



PwC Private Service

**Client Talk-book/
Discussion Document**

April 2026



Agenda

- 1 Introduction
- 2 Our Service Offerings to Family Businesses
- 3 Our Service Offerings to Executives and High Net-worth Individuals
- 4 Credentials and Team

Introduction



Our Commitment to Private Clients

Our Private Clients are wealthy individuals, families, business owners, founders of family businesses that have accumulated wealth over the years. Generally, key objectives of Private Clients is to ensure that their accumulated wealth not only succeeds them but continues to grow to meet their current and future financial obligations, financial needs of future generations and their charity and philanthropic endeavors.

At PwC, our purpose is “to build trust in society and solve important problems.” We believe that our purpose aligns with our value proposition to you, as our prospective Private Client. With the global expertise of our Private Service team, we have been a reliable support to our private clients in crafting bespoke solutions in relation to wealth succession, wealth transference and business continuity over the years.

To assist you, we have a global network of dedicated private business experts, we create innovative services and methodologies, conduct research and thought leadership, and develop unique programs specifically designed for you.



Our Service Offerings to Family Businesses



Our unique approach:

PwC Owner's Agenda

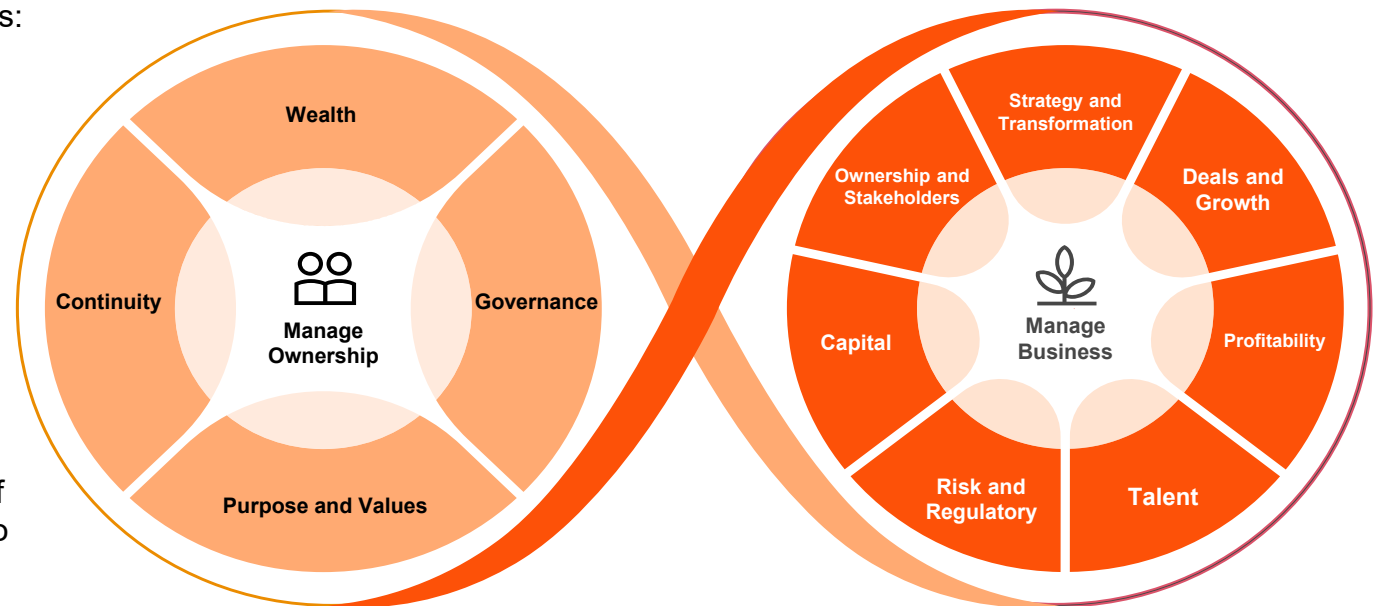
The Owner's Agenda is our unique approach to supporting family businesses of all sizes and generational stage. It's a proprietary framework that we've developed to assist business-owning families in developing both their ownership strategy and their business strategy.

As a family business owner, the Owner's Agenda helps to address two key interrelated issues that business owners must manage everyday vis: ownership dynamics and business success. It addresses both sets of issues in a consistent, integrated and joined-up way, reflecting the fact that you sit at the heart of each of them, and that your agenda encompasses both.

Balancing family and business

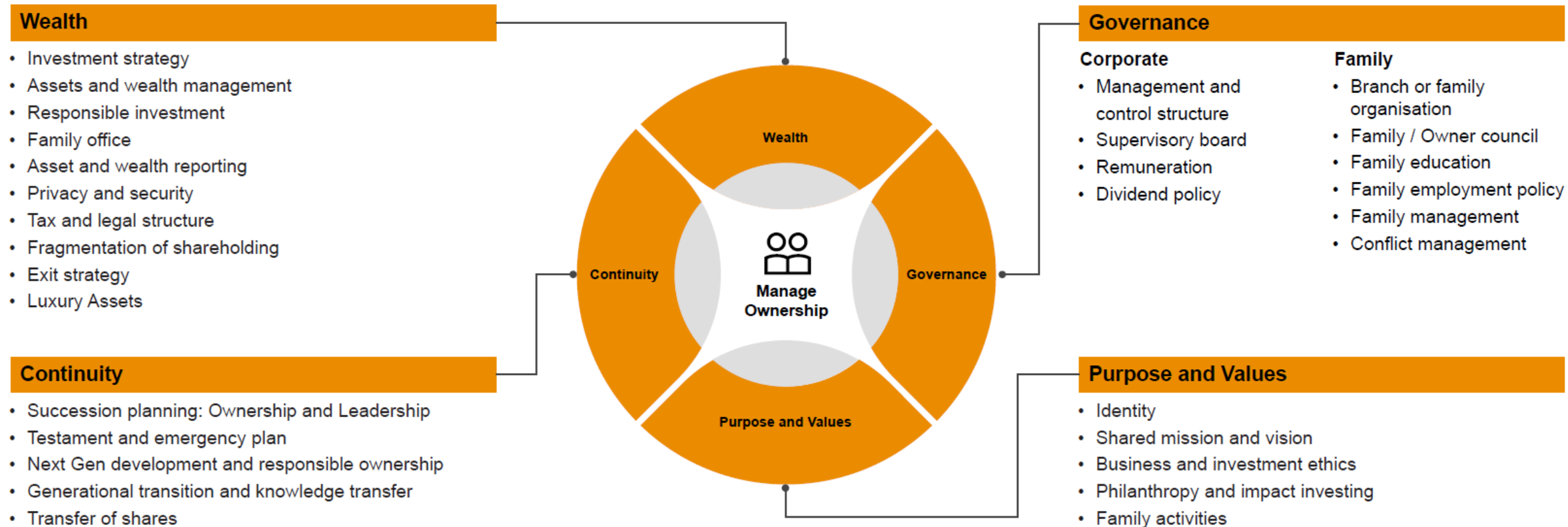
The diagram on this page illustrates how the Owner's Agenda balances and reconciles your family and business strategies. The infinity loop shows how the two sets of issues are entwined and constantly interacting with each other.

Within the loop, the "manage ownership" circle on the left shows four of the key challenges that we can help you identify and address relating to your ownership strategy. The "manage business" wheel on the right, shows the main issues that we can help you consider in creating the right strategy to drive and manage growth systematically.



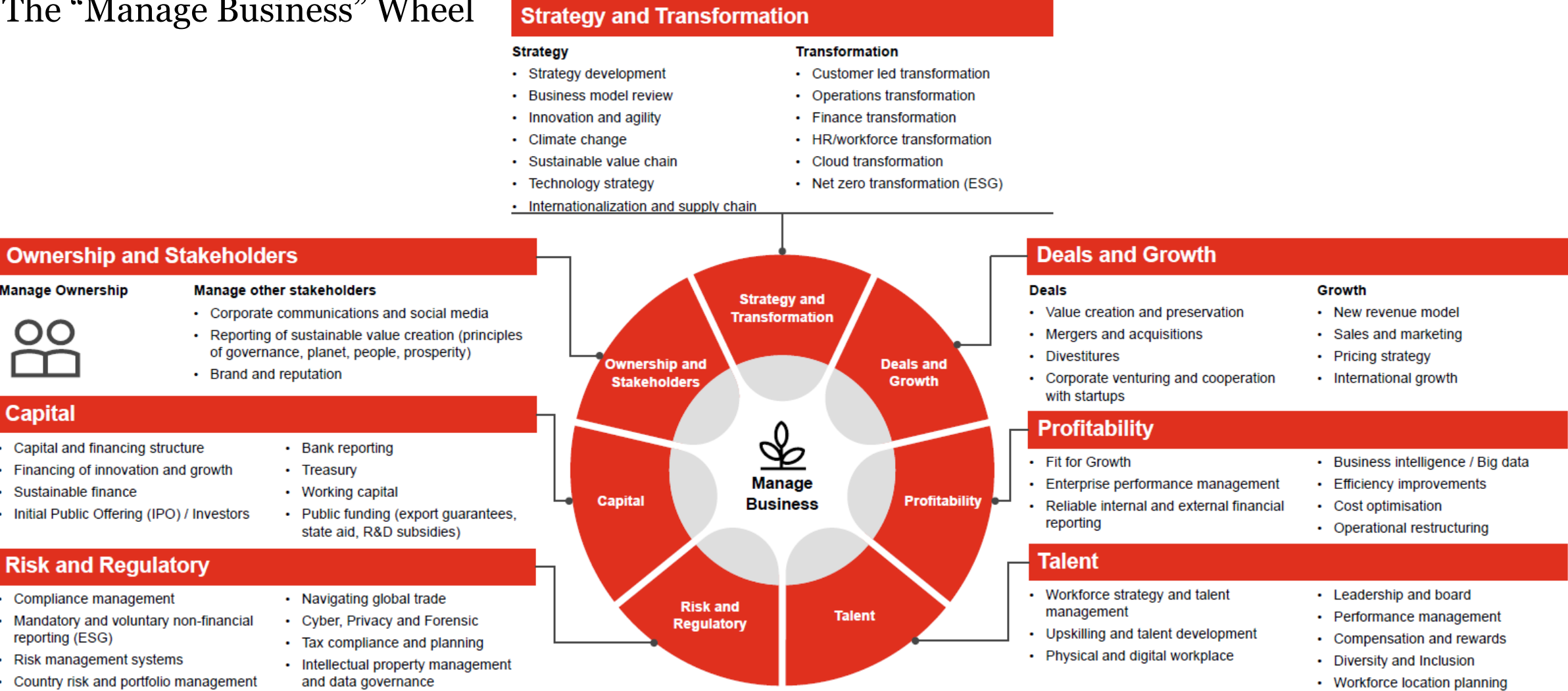
Our Service Offerings to Family Businesses

The “Manage Ownership” Wheel



Our Service Offerings to Family Businesses

The “Manage Business” Wheel



Our Service Offerings to
Executives and
High Net-worth Individuals

3

Our Service Offerings to Executives and High Net-worth Individuals

How can PwC help?



Credentials &
Team

4

Our Credentials

Client: Founder of the business was in his 70's, with three adult children. One child was COO, while the other two worked outside the business. He was uncertain the COO would be able to run the company and was looking for help with succession planning.

Project approach: Our team gathered data and interviewed family and advisors, followed by facilitating a series of discussions among the founder and his children. PwC brought expertise regarding leading practices for succession planning and preparing the next generation to become involved in the business. Our team met with each of the key stakeholders to evaluate strategy and succession alternatives and worked with the founder and his kids to design an approach. A key priority was forming a board of directors, which included non-family participants. PwC also conducted a skillset/capability analysis for the COO.

Client: Fifth generation family-owned business in the domestic entertainment and media industry. The family always had a family member as CEO and chairman of the board, and the board of directors consisted only of family members.

Project approach: We helped the Company identify the right talent needed at the board level, including:

- Evaluating the board of directors' oversight roles
- Suggesting they expand their board to include outside members
- Recommending they form committees to steer and oversee management functions
- Suggesting candidates for the new board seats.

Client: A retired engineer that was previously a top executive in a prominent oil and gas company in Nigeria. The engineer has physical and liquid investments in Nigeria and offshore, with total value of over one billion naira. The engineer has a spouse and two adult kids with multiple citizenship.

Project approach: PwC provided an advice on the various wealth succession and transference plans available in Nigeria and in the jurisdiction where the assets are held. We identified the pros and cons of each alternative and advised the optimal form to adopt to manage tax and cost exposures. We also supported the client in regularizing ownership of the physical assets and provided support in implementing his succession plan.

Client: A high net-worth individual taking up a role as a key consultant in a fintech company.

Project approach: Our team reviewed the contractual terms between our client and the company. We advised on compensation structures that enabled tax savings towards improving the client's disposable income. We also advised on the available tax planning opportunities and assisted in implementing the advice.

Point of Contact



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Jonathan leads PwC's Global Private practice, serving family businesses, family offices, and entrepreneurial owners. He oversees strategy, operations, talent development, thought leadership, and marketing for the sector. Jonathan also heads the Global & US Family Business and Family Office practice and has published thought leadership on family governance, strategy, and succession in national and international outlets. His focus is on building trusted, collaborative relationships and crafting tailored approaches to help families achieve their goals. As lead engagement partner for some of the largest US family businesses and offices, he leverages PwC's global network and collaborates with external advisors to deliver innovative solutions. Jonathan has deep experience in setting up family offices and private trust companies, assessing risk and governance, and developing multigenerational strategies. He is skilled in guiding owners through governance and oversight during generational transitions. His work supports long-term family and business success.



Esiri Agbeyi
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Esiri is a Partner at PwC Nigeria and leads the People and Organisation Unit in Tax, focusing on compensation structuring, immigration, and personal compliance. She also heads the Private Wealth Client Services team and serves as PwC Africa's Family Business Leader.

A specialist in Family Business Advisory, Private Wealth, International Tax, ESG, and Compensation Design, Esiri advises multigenerational family businesses, ultra-high-net-worth individuals, and corporate clients across industries. She has structured family offices, facilitated governance workshops, and developed succession strategies, including establishing trust structures for families.

Beyond client work, she hosts PwC's NextGen Talks podcast and leads family business roundtables. She is a Fellow of ACCA, CITN, and ICAN, with certifications from LBS, Cambridge, and NYU. Esiri serves as a Non-Executive Director, mentors professionals, writes articles, and speaks at conferences, earning multiple leadership awards for her leadership roles and contribution to the Nigerian economy.

Point of Contact



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Oscar Teunissen is a partner at PwC's New York office, serving as the Global Private Equity and Endowments Tax Leader. He also leads the PwC National Tax Strategy in the U.S. and is involved in the Family Office Practice.

With over 35 years of experience, Oscar specializes in advising family offices, hedge funds, and private equity funds on cross-border tax matters, investment opportunities, and managing global tax risks. His expertise includes asset management, international tax aspects of deals, and setting up tax-efficient structures.

Oscar focuses on global structuring, treasury management, international reorganizations, and mergers and acquisitions. He frequently speaks at conferences and has published articles in notable tax publications. His recent works include discussions on global infrastructure investing and U.S.-managed hedge funds.

Oscar holds degrees in Taxation and Economics from the University of Amsterdam, an LL.M. in Tax from the London School of Economics, and a U.S. LL.M. in Taxation from New York University School of Law. He is also a member of the Netherlands Tax Bar



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Olayinka is with the Private Wealth of PwC Nigeria. She has experience working with private clients and family businesses, advising High Net worth Individuals on their global wealth management and tax compliance matters.

She provides family wealth succession and family business advisory services to wealthy families, high net-worth and ultra-high net-worth individuals. She has advised wealthy individuals and families on optimal investment holding structures for efficient wealth succession, family business ownership restructuring (including set up of local and foreign holding structures), optimal ownership forms for the achievement of wealth preservation goals etc.

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Oluwatoyin is a Senior Manager with the People and Organisation team in the Tax Line of Service of PwC Nigeria. Her experience extends across the oil and gas telecommunications, information, entertainment, utilities, government and public sectors of the economy.

Since joining PwC in 2012, she has been involved in advising various clients on diverse tax and regulatory matters; immigration; payroll administration; tax structuring; contract reviews for tax efficiency; mergers & acquisition including due diligence, tax audits and investigation.

She holds a BSc (Hons) in Accounting. She is a member of the Institute of Chartered Accountants of Nigeria (ICAN) and Chartered Institute of Taxation of Nigeria (CITN)



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Babatunde Olaniyi is an Associate Director with over 10 years tax compliance and advisory experience with PwC Nigeria and PwC United Kingdom. His experience extends across the oils and gas, consumer and industrial products & services, and financial services sector.

He has worked on several tax advisory, tax audits and financial reporting engagements involving clients in the oil & gas, financial services, telecommunication, consumer goods and pharmaceutical industries.

He holds a BSc (Hons) in Accounting. He is a member of the Institute of Chartered Accountants of Nigeria (ICAN) and Chartered Institute of Taxation of Nigeria (CITN). He also holds an Advanced diploma in International Tax from the Chartered Institute of Taxation, United Kingdom

Thank you

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At PwC, we help clients build trust and reinvent so they can turn complexity into competitive advantage. We're a tech-forward, people-empowered network with more than 360,000 people in 136 countries. Across audit and assurance, tax and legal, deals and consulting we help clients build, accelerate and sustain momentum. Find out more at www.pwc.com.