



Family Legacies is a family business consultancy, focused on helping family business resolve the critical issues of keeping the family and business successful, leaving a legacy for future generations.



FAMILY LEGACIES

Securing Your Legacy for Future Generations

MULTIDISCIPLINARY FAMILY BUSINESS CONSULTING



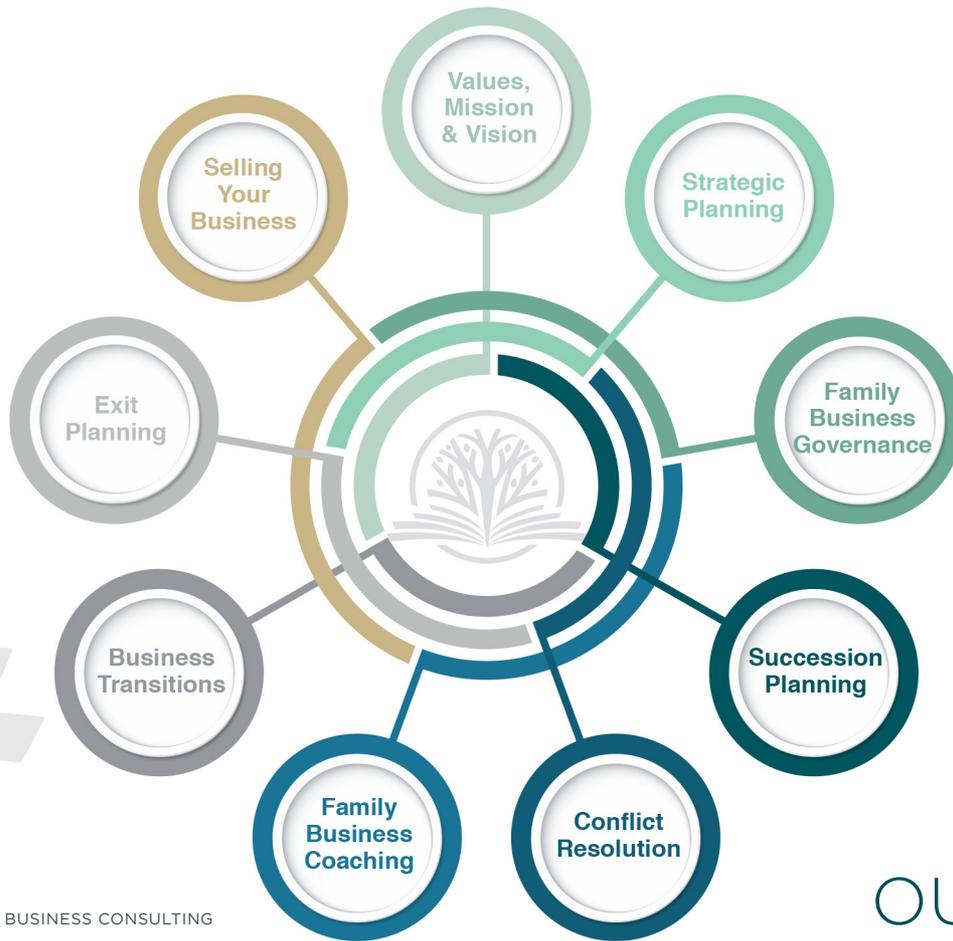
WE POSITION YOU
TO GROW
YOUR FAMILY-BUSINESS
SUSTAINABLY

Our services are professional, integrated, and multi-disciplinary. Family Legacies specialises in advising family businesses on how to manage critical issues and implement best practices to yield a successful, enduring organisation that serves family-owners and the community.

Let us help you ...

WHAT YOU DO TODAY, **AS A LEADER
OF A BUSINESS-OWNING FAMILY,**
WILL ECHO THROUGH
CURRENT & FUTURE GENERATIONS.

FAMILY LEGACIES GUIDES YOU & YOUR BUSINESS **ON THE PATH TO SUCCESS.**



FAMILY LEGACIES / MULTIDISCIPLINARY FAMILY BUSINESS CONSULTING

OUR **SERVICES**

CREATE SUSTAINABLE VALUE, MISSION, AND VISION STATEMENTS

These carefully constructed statements are particularly critical to the ultimate success of a family business. They promote cohesiveness among family members and offer comfort to clients.



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The financial success of any company ultimately rests upon its culture and underlying values. These statements create energy, momentum, and enthusiasm for the road ahead, edging the company towards a positive future. Once identified, family members work toward the clearly-stated business goals we help you structure.

OUR VALUE -, MISSION -, & VISION - CYCLE INCLUDES THESE KEY STEPS:

VALUE, MISSION, & VISION STATEMENTS



DEVELOP A SOLID FAMILY BUSINESS STRATEGY

The essence of planning is setting goals, and detailing the actions required to achieve those objectives in a rapidly changing world.



Businesses must continually evolve and develop new transitional strategies, if they are to remain healthy and financially viable across generations. Family Legacies guides you in developing these strategies through:



STRUCTURE MEANINGFUL FAMILY BUSINESS GOVERNANCE

For businesses to flourish it is crucial they continually evolve with effective and transparent governance structures.



Principles, policies and structures should be formalised to safeguard the growth and interests of the company and family shareholders.

Our consultants help you develop these constructs that also promote family harmony and welfare. Our integrated family business governance includes:

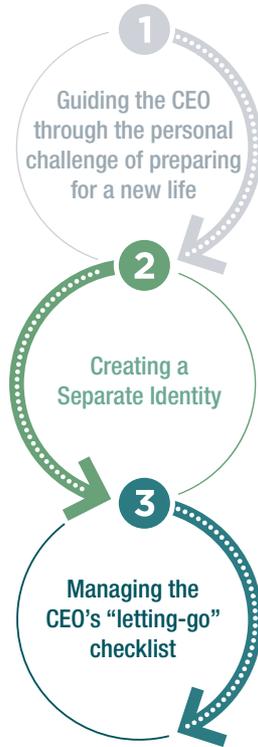


ADVANCE A SUSTAINABLE SUCCESSION PLAN

Business owners face great challenges when passing the company onto the younger generation. Lifelong hopes, dreams, ambitions, interpersonal relationships, and more come into play during this exacting phase.



Family Legacies helps you avoid the pitfalls of a mismanaged succession planning process, so you survive the second-, third- and beyond generational transition. Our integrated sustainable success plan cycle includes these key steps:



MANAGE CONFLICT RESOLUTION

Successful business families learn to manage the inevitable clashes around differences. They internalise the fact that discussion around alternative viewpoints and hidden agendas frequently encourages constructive change.



We teach you how to manage conflict so you flourish.

We guide you in developing compassionate communication & problem-solving techniques. Our integrated conflict management program includes these key steps:



ENGAGE IN SUPPORTIVE **FAMILY BUSINESS COACHING**

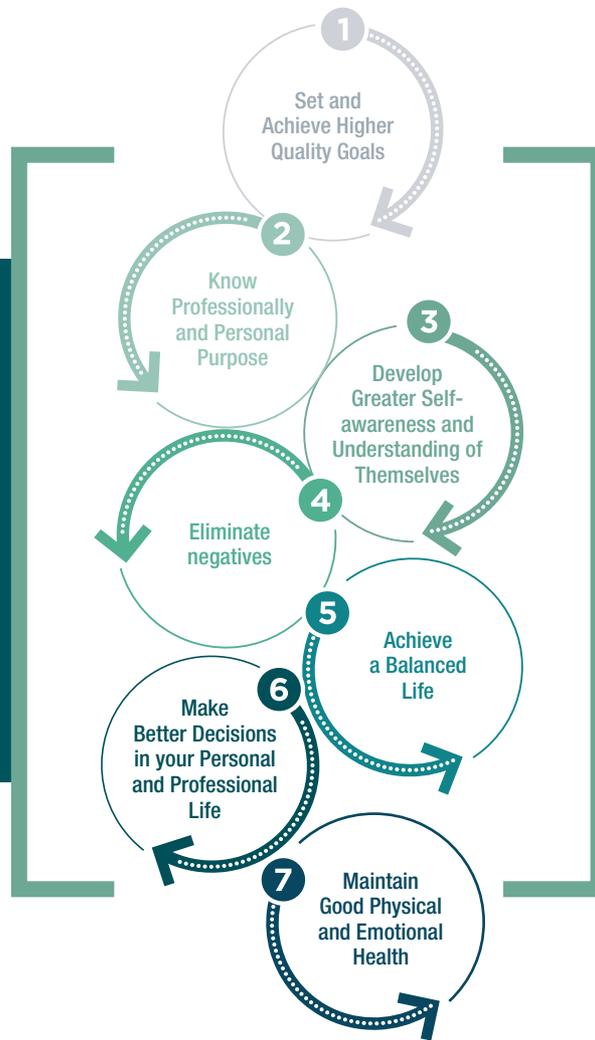
A professional sounding board encourages necessary personal reflection. It clarifies and develops the best mix of skills and experience to meet each new challenge successfully.



Family Legacies uses an objective, non-judgemental, impartial approach

that encourages clear communication between family business members with no fear of reprisal. Our integrated business transition cycle includes the key steps.

We help you:



FORMULATE EFFICIENT BUSINESS TRANSITIONS

We understand the complexities involved in the business cycles of buying, improving, growing and selling businesses.

We provide business consulting and ownership transition services to privately-held small-, and mid-size, business owners to assist them in transitioning your businesses smoothly – and on your terms.

BUSINESS

SELL

GROW



Our mission is to help owners transition their businesses on their terms, on their timeline, at the maximum selling price.

A longer-term approach that yields better results transition. Our integrated business transition cycle includes these key steps:



ADVANCE FORWARD-THINKING **EXIT PLANNING**

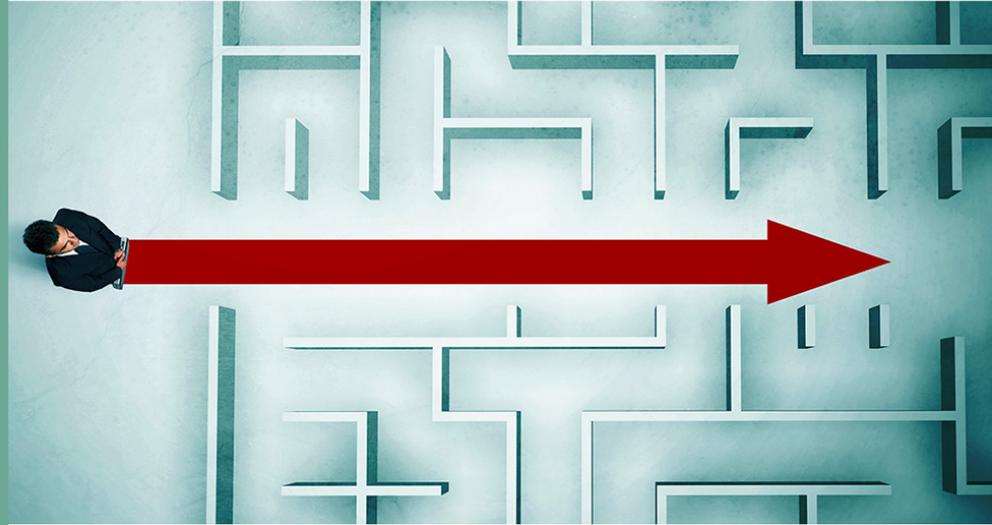
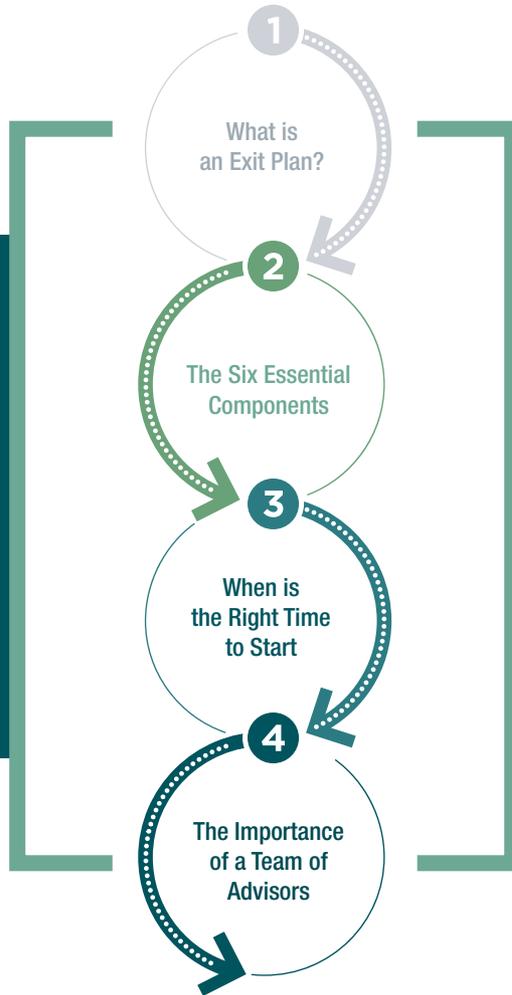
Developing a solid executable exit plan is the most important thing you can do to protect the value of your business. It is likely to be your most valuable asset, representing 80 - 90% of your net worth, and 100% of your annual income.



We help you plan successfully

for this transition because we understand the need to prepare to plan a timely exit thoroughly.

Our integrated exit-planning cycle includes these key steps:



PLAN THE ULTIMATE **SALE OF YOUR COMPANY**

Succession planning can be one of the most challenging aspects of owning and operating a family business.



Many family business owners want to pass ownership onto younger generations to keep the company 'in the family'. If a clear successor within the family doesn't exist, we coach you in fit, timeline, and cost so you make a choice that reflects the importance of your choice.

Our integrated business sale planning cycle includes these key steps:



EXPERT GUIDANCE YOU CAN TRUST

Family Legacies' Associates have proven expertise in Family Business Consulting, Corporate and Family Business Strategic Planning, Financial Planning, Wealth and Risk Management, Corporate Finance, Business Transitions and Exit Planning (Buy, Improve, Grow and Sell-Side and Buy-Side Businesses), Commercial and Family Law, Executive Coaching, Leadership Development and Facilitation. These skills assure you of a professional and integrated multi-disciplinary service.



FOUNDED BY **TREVOR DICKINSON**

- 30 year career with Trevor's four-generation, 110-year old family business founded by his great-grandfather in 1910.
- Trevor has a wealth of knowledge and insights into the critical issues and challenges associated with working in as well as leading a family-owned business.
- Trevor completed an undergraduate degree in BSc. Bldg. Mgmt., MBA, and numerous executive and certificate programs. He started developing his knowledge and expertise in family business consulting 24 years ago.
- Awarded Dual Certificates in Family Business Advisory & Family Wealth Advisory with the Family Firm Institute. Also awarded Certificate in Family Business Governance & Directorship from Family Business Australia.
- Member of the Institute of Directors IoD (South Africa), Family Firm Institute (USA), Family Business Australia and Exit Planning Institute (USA).
- Trevor has vast experience working with family-owned companies throughout the world; North & South America, Europe, Russia & CIS, Middle East and throughout sub-Saharan Africa.



LET'S **TALK** *Trevor Dickinson*

FAMILY LEGACIES / MULTIDISCIPLINARY FAMILY BUSINESS CONSULTING

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VISION STATEMENT

Family Legacies' vision is to perform as a leading company specialising in family business consultancy. We focus on helping family businesses resolve critical issues and successfully maintain the business to leave a lasting legacy for future generations.

MISSION STATEMENT

Family Legacies mission is to facilitate successful family businesses. In the process, we resolve the challenges associated with preserving a successful family business. Our consulting and leadership coaching practices enable family-owned businesses to respond appropriately to current complex and pressing socio-economic challenges.

Securing Your Legacy for Future Generations

