

AC Corporate Transaction Services

Family Office Services

Assist Family's and High Net Worth Individuals with investment and family office services including raising growth capital to fund expansion.

Background

High Net Worth Family Office's that require value-enhancing work that is clearly understood and supported. Services including corporate finance, structuring, and succession planning. Custom designed solutions that achieve business and financial goals.

Approach

Our structures provide an effective mechanism for next generation owners to purchase shares in the company they work for.

The benefits of the structures are directly dependent on the growth in earnings of the company concerned.

This caters for succession planning considerations where a founder shareholder wishes to align the interests of new prospective owners with the overall performance of the business.

Tax and corporate structures are in line with our laws and regs. Structures have particular benefit for a tightly controlled enterprise (e.g. family businesses) looking for an efficient succession planning tool. Creates alignment and value-added approach to succession.

Having a professional alongside can also help diffuse the tension created through this process.

Outcomes achieved

These transactions are particularly suited for businesses that are bankable and likely to be valued in excess of R100m+. Issues identified were adequately addressed in the relevant transaction agreements. The post-transaction integration process was planned and executed on budget.

Client Feedback

"A big thank you for your resilience and efforts at successfully negotiating our efforts through a difficult business environment. You have added real value to our business, demonstrating acumen on development financial matters. Many thanks and best of luck."

Contact

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Engagement Overview



Role
Services to Family Office



Sector
Investment / Asset Management / Financial Services



Geography
Southern Africa



Enterprise Value
R150m+



Team Size
Family Office



Type of Engagement
12-month duration