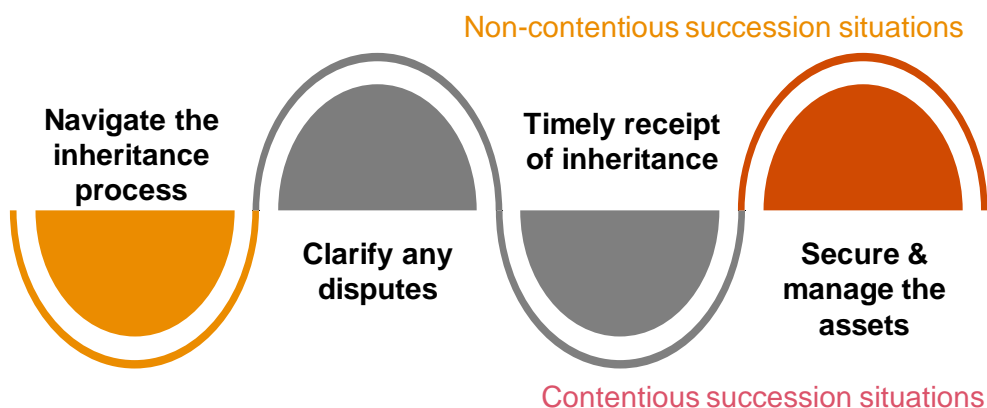




# Supporting high net worth individuals in succession situations

Succession planning for high net worth individuals can be a complex and sensitive subject. Any mis-step may strain family ties and diminish the value of the family wealth. The right professionals will help an orderly transition and manage family disputes.



## How PwC can help

### Support to executor

Compiling assets & liabilities of the deceased. Investigate financial transactions. Support management, disposal & distribution of assets. Preparation of estate accounts.

### Interim administration

Act as Court-appointed independent administrator to safeguard and manage deceased's assets pending resolution of proceedings in Court. Support settlement discussions.

### Estate administration

Appointment by beneficiaries to act as administrators. Attend to probate formalities, take custody of assets, settle liabilities and make distributions to beneficiaries.

### Trust disputes

Independent Court-appointed trustee or provision of support to trustee. Support mediation / settlement discussions. Financial review of the underlying assets. Prepare financial statements of the trust. Advise on distributions of assets to beneficiaries.

### Executorship

PwC named as executor in the will of testators as part of their wealth and succession planning.

### Asset verification & tracing

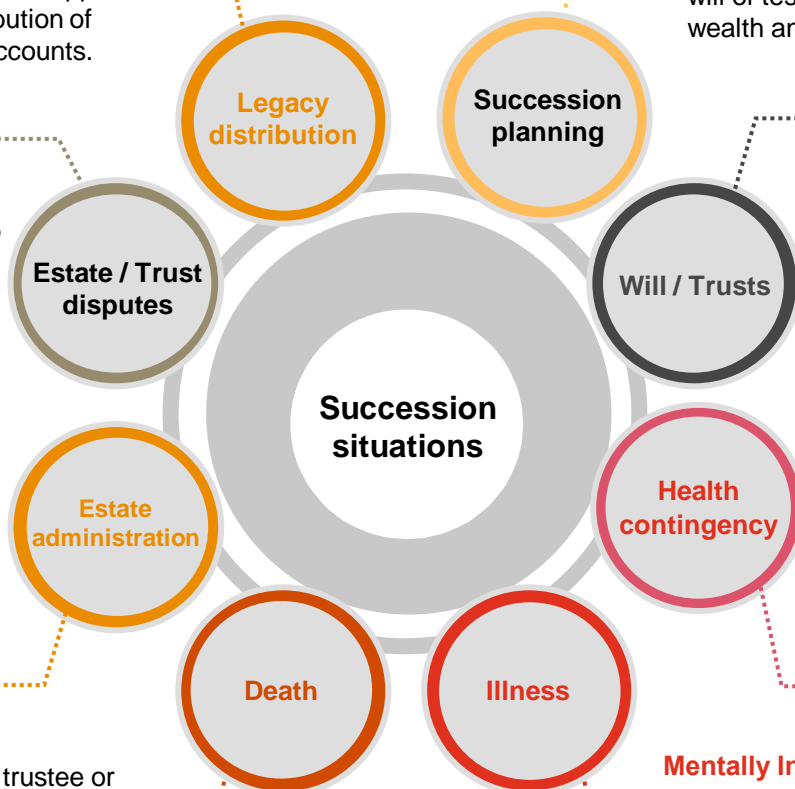
Assist client to verify and draw up list of assets for succession planning and will preparation.

### Enduring Power of Attorney ("EPoA")

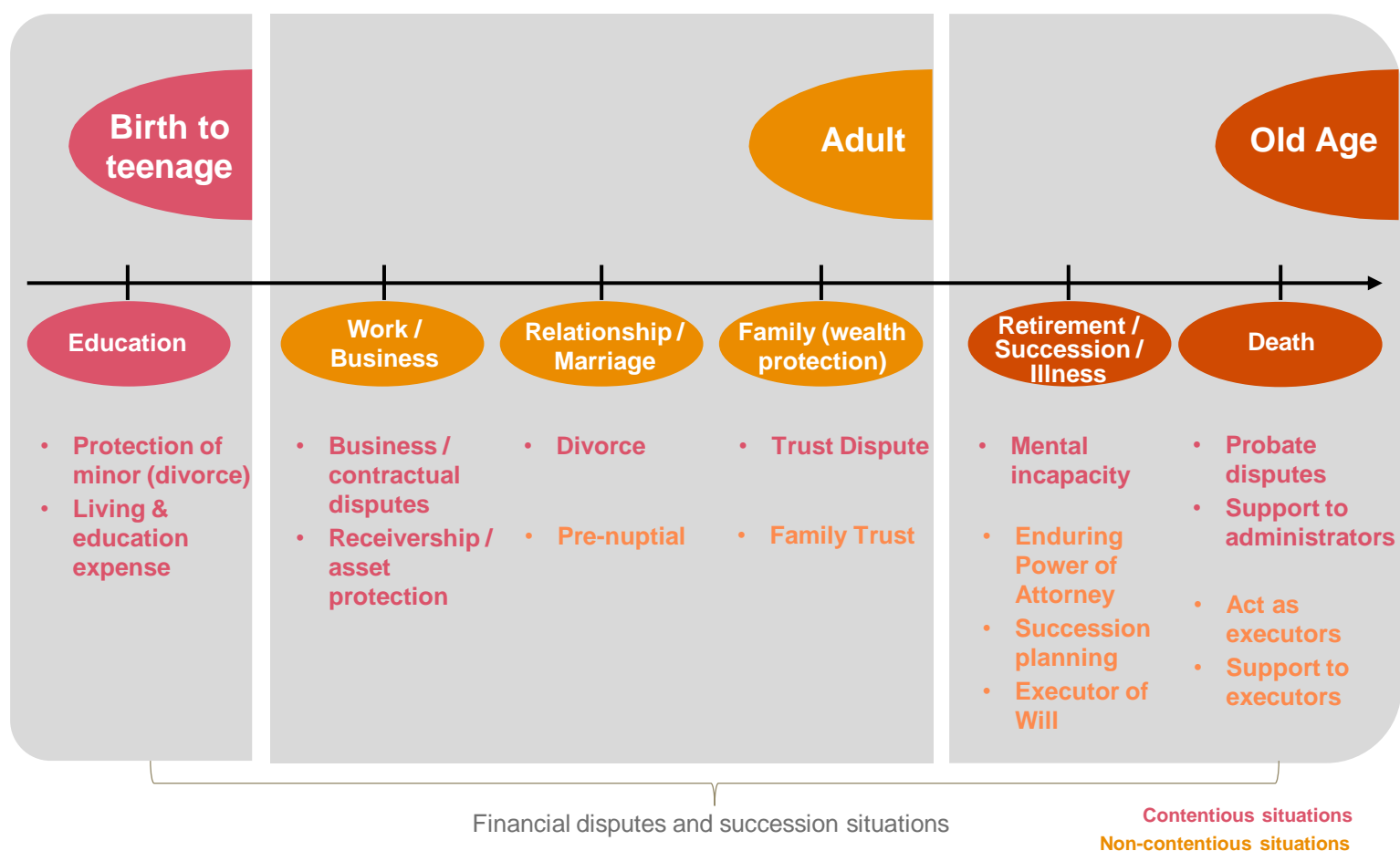
Manage the assets in accordance with the authority granted by client upon occurrence of specified events or incapacity.

### Mentally Incapacitated Person ("MIP")

PwC acts as Committee pursuant to the Mental Health Ordinance. Protect and manage patient's assets and attend to patient's financial needs.



## Personal Financial Life Cycle



Timely use of professionals  
can make a big difference

## Contact us

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