



Workshop on:

# Wealth Management for Family Owned Businesses

January 25, 2020

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## Program Overview:

It is an undeniable fact that it takes a generation to establish a business. Accordingly, business entities then transfer ownership to the second generation, and it turns into a family owned business. Research shows that only 3% of all the family businesses worldwide remain in business for more than three generations.

In order to bring sustainability to family owned entities, formal procedures must be adapted for wealth management amongst the shareholders. Important shareholders agreement, documented decisions for the upcoming and outgoing generations has to be incorporated; methods of business diversification by the young family members should be discussed, written and adapted. Considering these important features, this workshop has been designed to facilitate structured wealth management practices in family owned organizations. Core discussions amongst the shareholders and few case studies will be the highlight of this workshop.

## Who Should Attend?

Family Business owners and their generations are highly encouraged to attend this session

## How Will You (Participant) Benefit?

- Form share purchase agreement
- Organization structuring with respect to governance and legal aspects
- Plan for induction of upcoming generation along with their financial compensation

## Trainers Profile:

Mohsin Adhi has more than fifteen years of professional experience from the corporate sector which is still ongoing. His corporate exposures include projects like delisting and buy back of securities, research and analysis of securities, interexchange arbitrage, media representation, etc.

Mohsin is a Board member of a Brokerage Firm (TREC & Clearing Member of PSX as well as Pakistan Mercantile Exchange (PMEX). Moreover, he is visiting faculty member at the Institute of Business Administration (IBA) Karachi. Apart from his Masters specializing in Finance and Financial Law from University of London, he is also a Certified Director of SECP as well as Master Trainer for Fixed Income and Securities.

His exposure as a consultant includes Organization Development, New Product Development and Change Management. In the past few years he has focused SME's and Family Managed Business as a core focus area of consulting. The companies facilitated through consulting belong to diverse sectors including Automobile and its Parts, Assets Management, Printing, Chemicals and Crockery.

In addition to this he has conducted trainings for participants from companies like Sindh Engro Coal Mining Company (SECMC), National Bank of Pakistan, Meezan Bank, American Life Insurance, Premier Agencies, Pak Libya Holding Company (Pvt.) Ltd., Synergies Worldwide. Mohsin has facilitated Family Managed Businesses in wealth management and business consulting, amongst those few prominent ones are B.P. Confectionaries, United King, Power Plus, Saeed Ghani, ICON Design, PCI Automotive and HTG Petrochemical IND (Pvt) Ltd.

## Topics Covered:

### Business as a legal entity

- Futuristic approach of division of the business
- Distribution of wealth amongst the family shareholder
- Provision to include executives as shareholders
- Tax implications
- Delegation of responsibilities

### Shareholders agreement

- Buy back provision
- Ownership and execution transfer
- Dividend policy
- Sponsors underwriting provision

### Capital structuring

- Debt to equity ratio
- Family based proportionate distribution
- Implication in terms of raising finance

### Investments and portfolio management

- Investments in family subsidiaries
- Investment portfolio other than family business
- Investment assessment tools

### Financial Statements

- Formal reporting
- Key ratios to assess

## Workshop Fees PKR 25,000/- per participant + 5% SST

Inclusive of Course material IBA Workshop Certificate Lunch Refreshments & Business networking

Experience

## EXECUTIVE EDUCATION

Centre for Executive Education, IBA, Karachi

Center for Executive Education (CEE)  
Institute of Business Administration City Campus.  
Off Garden Road, Karachi-74400.

### For Further Information

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