

SPORTS AND ENTERTAINMENT

Family Office



STONEHAGE
FLEMING

NOW AND FOR FUTURE GENERATIONS

PLANNING FOR THE LONG-TERM

Few people get to turn their passion into a career, but for professional athletes and entertainers, their talent, dedication and sheer determination is what takes them to the top in fiercely competitive industries. We understand that the rewards for this hard work and dedication in what can be a relatively short career, should be preserved and enhanced.

Stonehage Fleming has a wealth of experience in these sectors, providing clients with a range of integrated financial and administrative services to allow them to focus on their careers.

The peak earning potential of a sports and entertainment professional varies greatly throughout their career. Building a capital base to provide for their long-term future can be a challenge. Needs vary according to the complexity of an individual's circumstances, but, generally, all are seeking to meet long-term requirements – both for them and their families.

Experience has taught us how to help our clients avoid the obvious pitfalls, while helping them take advantage of the many opportunities which may present themselves.

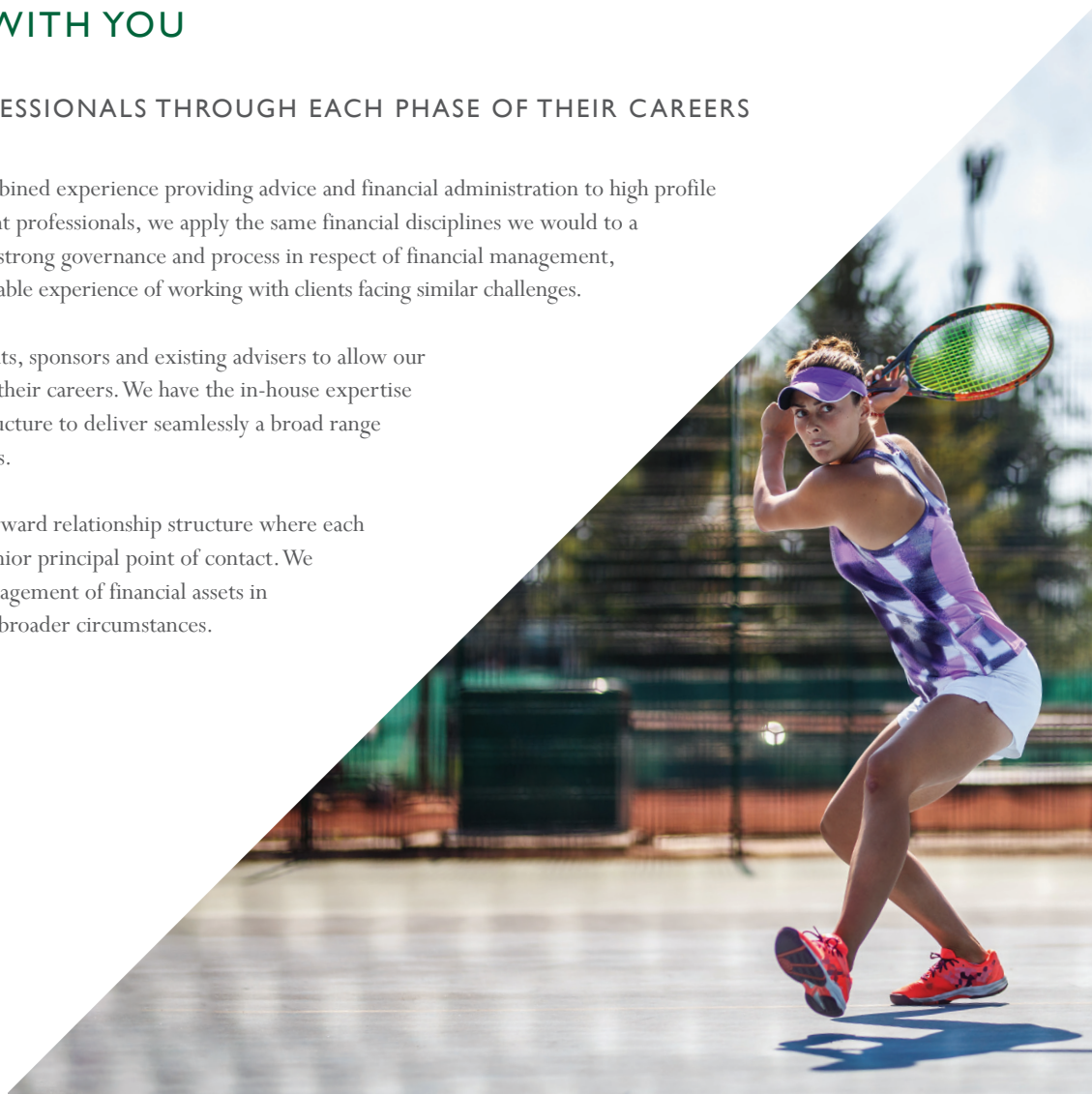
WORKING WITH YOU

WE GUIDE PROFESSIONALS THROUGH EACH PHASE OF THEIR CAREERS

With over 50 years combined experience providing advice and financial administration to high profile sports and entertainment professionals, we apply the same financial disciplines we would to a business. We emphasise strong governance and process in respect of financial management, drawing on our considerable experience of working with clients facing similar challenges.

We work alongside agents, sponsors and existing advisers to allow our clients to focus fully on their careers. We have the in-house expertise and operational infrastructure to deliver seamlessly a broad range of Family Office services.

We operate a straightforward relationship structure where each client is assigned one senior principal point of contact. We always consider the management of financial assets in the context of a client's broader circumstances.



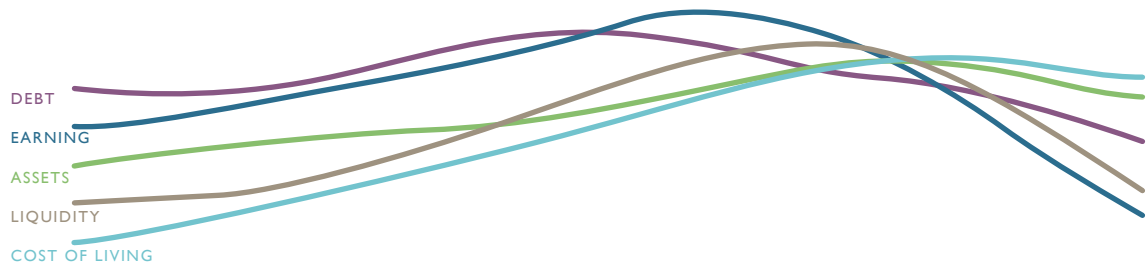


ADVISING AT EACH STAGE OF THE LIFECYCLE

Our experience of advising other successful sports and entertainment stars, as well as a wide variety of wealthy individuals and families, give us insights into the challenges and opportunities they face.

This experience goes far beyond financial matters and helps ensure that all decisions and their implications are considered thoroughly and in their proper context.

Stonehage Fleming provides advice at each stage of the lifecycle.



POSITION AND CHALLENGES

BUILDING

- ▶ Funding from personal resources
- ▶ Living off salary, limited prize money & endorsements
- ▶ Property, car often a priority
- ▶ Managing relationships with first agent & advisers

GROWING

- ▶ Increased wealth from salary, sponsorship & commercial partnerships
- ▶ Increased profile
- ▶ More complex lifestyle requirements and assets
- ▶ Identifying and following processes around financial decision making
- ▶ Growing roles of advisers
- ▶ Growing pressure to perform
- ▶ More strategic thoughts around purpose of wealth

PEAKING

- ▶ Earnings peaking
- ▶ Brand maximisation
- ▶ Planning for life post sport, deciding when to retire & reflecting on legacy
- ▶ Looking after family & increased lifestyle costs
- ▶ Consolidating direct investment opportunities

NEXT CHAPTER

- ▶ Initiate post career plan
- ▶ Managing life events
- ▶ Re-evaluate lifestyle sustainability
- ▶ Reassessment of direct investment interests
- ▶ Constant re-evaluation of post career financial requirements
- ▶ Prepare the Next Generation
- ▶ Engage in social capital and philanthropic ambitions

As a family office, a key focus of Stonehage Fleming is the protection and preservation of family wealth through the generations. We support clients through each stage of their career providing bespoke family office and wealth planning services through to tax planning, structuring, investment management and next generation education.

WHAT WE DO FOR CLIENTS



PROFESSIONAL
ATHLETES



MUSICIANS



ACTORS,
DIRECTORS & MEDIA

Our specialised services have been designed in direct response to the needs of international athletes, entertainers and their families:

- ▶ Financial reporting and governance
- ▶ Investment management
- ▶ Budgeting and financial planning
- ▶ Global tax compliance
- ▶ Fiduciary trusts, and company formation
- ▶ Business management and support
- ▶ Project management
- ▶ Lifestyle asset management
- ▶ Legal and structuring
- ▶ Philanthropy
- ▶ Wealth planning

THE PROCESS

1. STARTING THE CONVERSATION

Our process begins with a series of conversations to understand a client's purpose, values and aspirations for the future. We do not expect them to have all the answers but a good starting point is to consider:

- ▶ What drives and motivates you?
- ▶ What does having wealth mean to you?
- ▶ What do you want achieve with your wealth?

2. ARTICULATION OF STRATEGY

The next step is to articulate the strategy - how to effect to the values articulated in the first stage. Here we consider:

- ▶ Retirement planning
- ▶ Inheritance planning
- ▶ Philanthropy
- ▶ Family governance
- ▶ Investment structuring and strategy
- ▶ Asset protection
- ▶ Next generation education

3. IMPLEMENTATION

We then work with families, providing ongoing implementation and continuity of advice.

CONTACT US

Please contact us for a discussion if you think we may be able to help you and your family.

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