



Case Study: Family Business



Future-proofing Family Businesses

STRUCTURED OWNERSHIP TRANSFER





Client Overview

OWNERSHIP TRANSITION

The family-run retail company aims to **smoothly transfer ownership shares** from parents to children while ensuring stability and tax efficiency.

FAMILY HARMONY

It's crucial to **preserve control and protect family relationships**, ensuring continuity and harmony as the next generation takes on leadership roles.

The Challenge of Transition

GOVERNANCE AND SHARE TRANSFER

- Complete share transfer for Business Property Relief
- Avoid triggering Capital Gains Tax
- Establish clear governance to prevent disputes
- Maintain family harmony and operational continuity
- Secure future leadership and decision-making clarity



Our Solution

01

VALUATION

We conducted a **comprehensive valuation** of the family business, ensuring accurate assessment and fair pricing for ownership shares during the transfer process to the next generation.

02

SHARE CLASS

The redesign of share classes was essential to **balance control** and inheritance objectives, allowing parents to retain oversight while ensuring equitable distribution among the children.

03

GOVERNANCE

We established a structured governance framework through **shareholder agreements**, clearly outlining voting rights and responsibilities to prevent future disputes and ensure smooth operations.

Key Outcomes of Our Approach



SUCCESSFUL SHARE TRANSFER

Achieved zero Capital Gains Tax liability



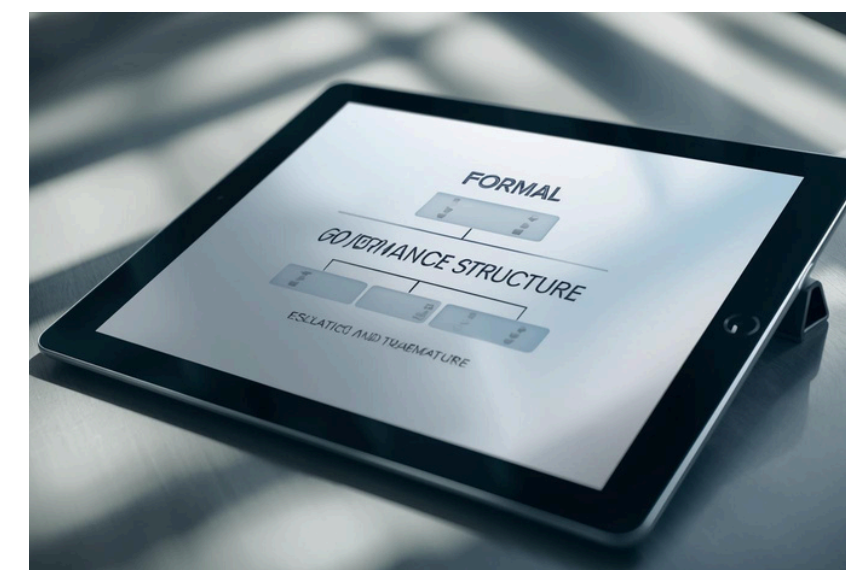
IHT EXPOSURE REDUCTION

Significant savings via Business Property Relief



FORMAL GOVERNANCE FRAMEWORK

Established to ensure family harmony



STRENGTHENED FAMILY UNITY

Enhanced collaboration and shared vision

Client Testimonial: A Safe Transition

"A TRUSTED PARTNERSHIP"

“Lanop protected both our business and our relationships. The transition felt natural and safe.” This quote highlights the importance of family-focused guidance.




Running a family enterprise?

Email

inquiries@lanop.co.uk

Phone

 +44 7769 736060

 +971 56 819 1060

Book a Free Meeting

