



CHINIARA & CO.

Advisors to Business Families

Protecting your Wealth Through Generations

Our Deliverables

Facilitate conversations among family members, and ensure alignment

Design and action 100-year governance transformation plans

Institutionalize decision-making systems & processes

Devise governance structures, and monitor their implementation

Build Boards of Directors, and help grow your Wealth

Our Structure and our Remit

The Chiniara Foundation



DYNASTIC PLANNING*

- 100-year Governance Transformation Plans
- Governance Stress Tests
- Facilitating / Initiating Conversations
- Alignment
- Vision, Values, Purpose
- Devising Family Charters
- Building Institutions at 3 levels: Family, Family Business, and Private Capital
- Implementation
- Tracking Change

GOVERNANCE INTEGRATED SOLUTIONS

- Family Business
- Trusted Advisory
- Board Participation
- Legal Strategy
- Managing Third-Party Relationships
- Mentoring & Coaching NxG to take ownership
- Mentoring & Coaching Seniors to Let Go
- Family Office
- Building Infrastructure
- Intra/Entrepreneurship

MEDIATION

- Conflict Management
- Conflict Preemption
- Settlement Negotiation

R & D

- Advanced Research History & Philosophy of Governance
- Lecturing & Publishing
- Developing Region-Specific & Bespoke Legal and Governance Tools
- Legislative Support
- ESG / Doing the Right Thing

* Applying The 7-Step Methodology™

Our Competitive Advantage

We care

We care about you, your family, and your family business, and we put you and your family at the center
We have nothing to sell, and if we were to sell you anything, it would be peace of mind
We are known to go beyond the call of duty

We are pioneers

We were the first to introduce family governance advisory to the region, others simply followed our lead
Our 7-Step Methodology™ has been tried and tested successfully over the past 25 years
Our approach has been recognized by our peers as a game-changer

We are independent

Serving business families has been our bread and butter for over a quarter of a century
Your interests and those of your family always come first
We are not employed by any organization or linked financially or otherwise to any government concern

We are selective

We work only with families who wish to build a better and a more sustainable future
Our vision is to become their preferred partners throughout their transformation journey
Our objective is to help create 50 million jobs, one family business at a time

We are lawyers

We fully understand the culture, the fundamental values, and the legal system across our region
We question the facts, and we devise region-specific and tailor-made solutions to address your needs
We keep your information private and confidential

Our Approach



From Experience

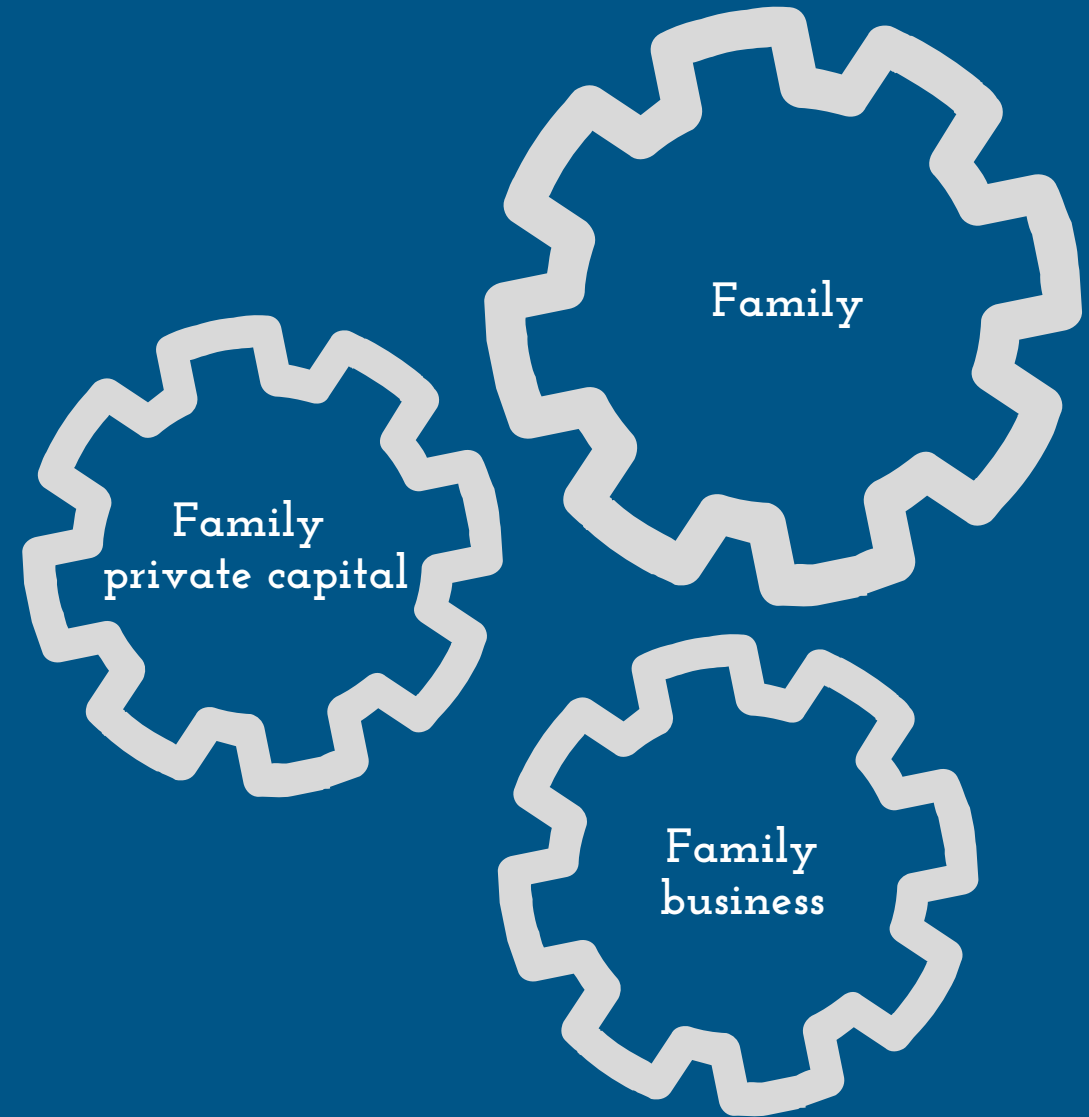
No matter how sophisticated a legal, financial, tax, or accounting structures one puts in place, it will fall apart ... if the family members are not aligned, and do not subscribe to the same vision, values, and purpose.

Holistic Approach to Family Businesses

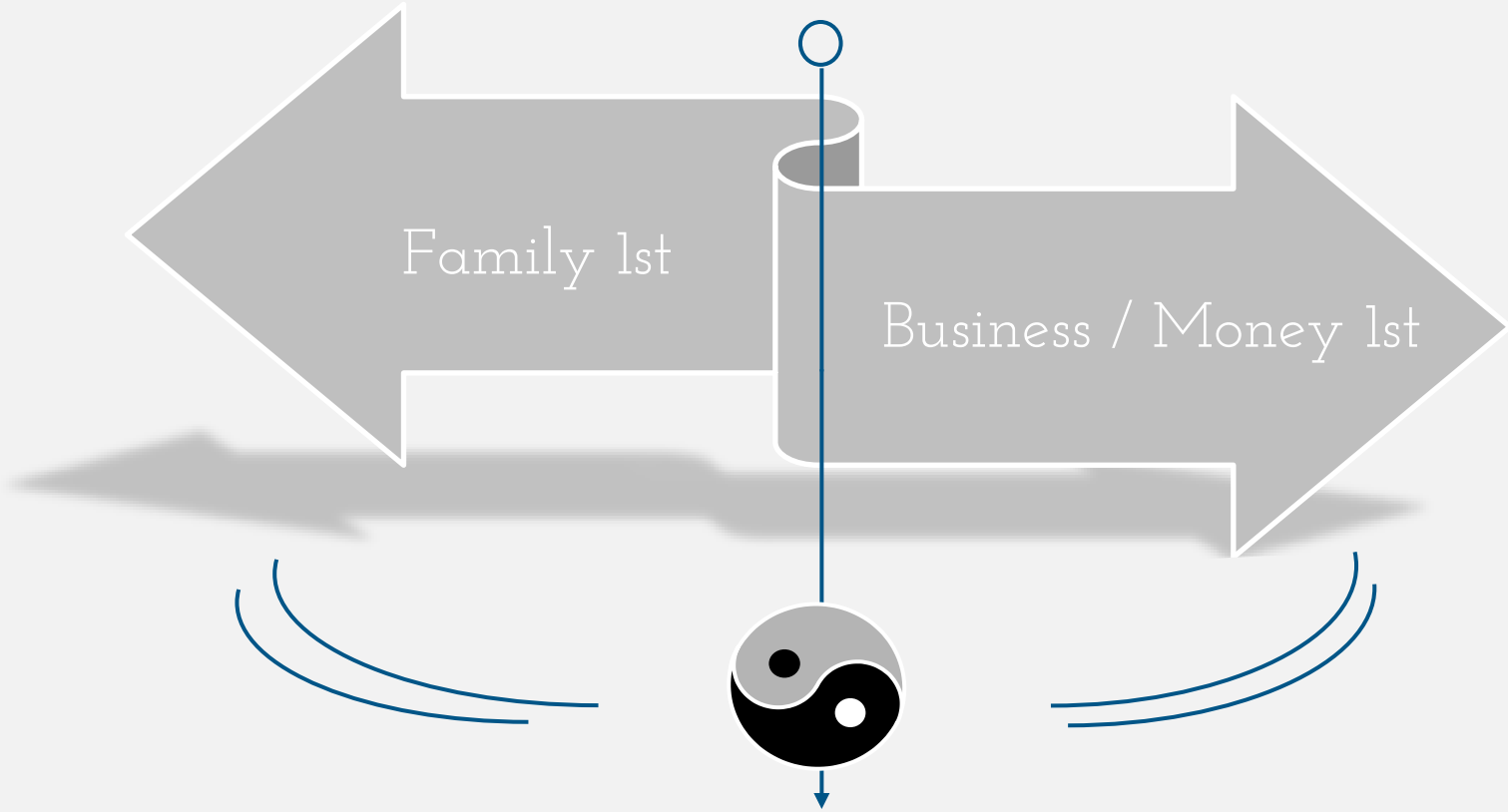
A family business, unlike other forms of business, is not a stand-alone entity.

It is an ecosystem comprised of three autonomous systems: the Family, the Family Business, and the Family Private Capital.

These systems are different in nature, yet complementary, and cohabit under the same roof.

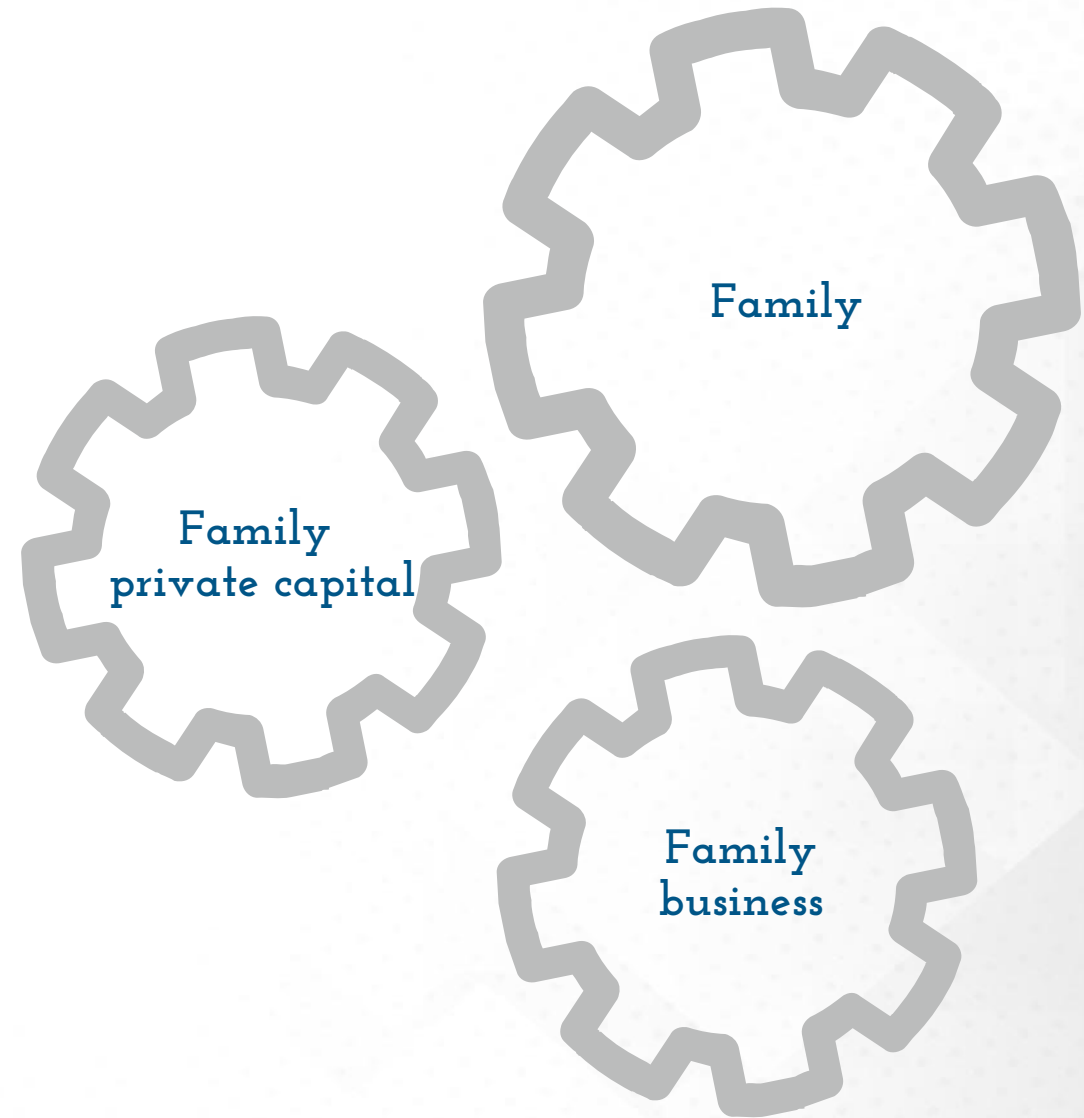


The Perpetual Dilemma in Family Businesses, and the Primary Cause of Conflict



To cohabitate efficiently,
each one of these systems,
requires its own governance
rules and policies.

The whole, encapsulated in
what is commonly called a
'Family Charter'.



In a family business context

There are no standards-fit-all family charters

There are no best practice systems and processes

Every family is different

When Others

... focus on the money and the source of money;

We put the family at the center

... treat governance as a commodity;

We approach it as a state of mind

... start with a template and try to fit you in a box;

We take you on a journey

Bottom-up Approach

1. We facilitate the **conversation** among family members and help them achieve alignment and agree a common vision, values, and project.
2. We devise **scalable and bespoke solutions** tailor-made to fit the family's needs, long-term.
3. We help families devise **family charters** and introduce **Institutions** designed to protect their assets onshore and offshore.
4. We assist families with the **implementation** of their family charter and ensure the sustainability of their wealth in the hands of future generations.
5. We are **respectful**, and work at the pace of the slowest family member.

Our Story and our Ambitions

Walid S. Chiniara was joined by his son Karl Chiniara to institutionalize Walid's family business advisory practice, and to take it to new levels.

Together they established **Chiniara & Co.** to capitalize on the past 25+ years since Walid entered this field. Their objective is to create 50 million jobs, over the next twenty years, one family business at a time.

They are supported by a distinguished advisory board, who's role is to help the practice excel at serving the family business community and its next generation of leaders.

In addition, they are seconded by an exceptional team of multi-disciplinary experts who contribute to devising bespoke and tailor-made solutions to address the needs of *their families*.

Chiniara & Co. is controlled by **The Chiniara Foundation** for the study and advancement of the 'Law' in matters pertaining to family business succession planning.



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Walid S. Chiniara, Esq. is the founder of Chiniara & Co. He is an international finance lawyer, an artisan, and a thought leader in the field of governance, its history, and philosophical foundation.

After 15 exciting years practicing law across several jurisdictions, Walid spent the last 25+ years serving families in business, looking to preserve and grow their Wealth in the hands of future generations.

He worked alongside over 165 iconic families from around the world, building family offices, managing conflict, and devising family-specific tools, tailored to address their needs and those of the rising NxGen. He still acts as *homme de confiance* to many of them.

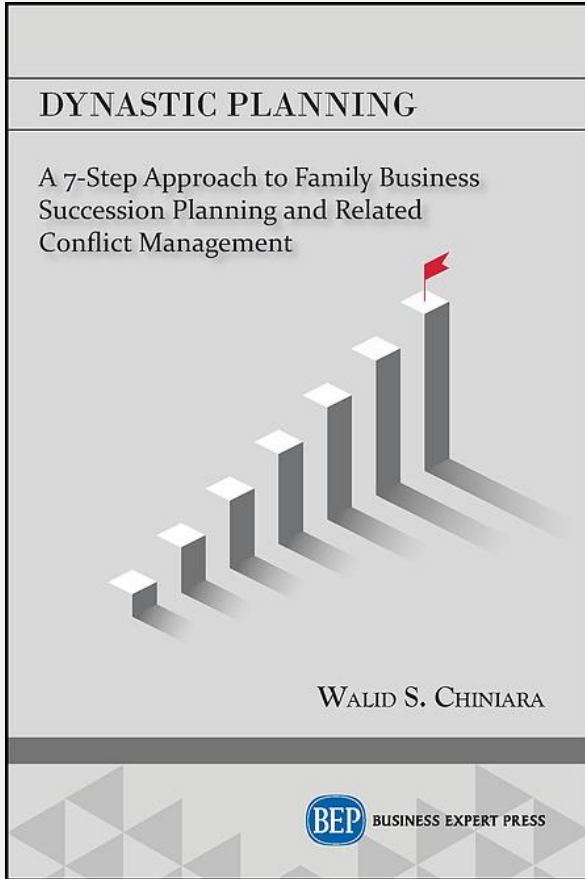
Over the years, Walid forged himself a reputation as the go-to person for mission impossible family business succession planning, and the 7-Step Methodology™ he has developed has been recognized by his peers as a game changer. For many, it has become the family business succession planning tool par excellence.

He is an accredited Mediator and a member of the Quebec Bar. He is also, an associate member at Outer Temple Chambers, in the UK, a fellow at the Institute for Corporate Governance, ESCP Business School, Paris, France, and a member of the Family Firm Institute (FFI), the Society of Trust and Estate Planners (STEP), and The International Academy of Trust and Estate Law (TIAETL).

Walid is the recipient of many prestigious awards, a published author, and a regular guest speaker at a number of regional and international forums. He recently shared his experience in a book titled: *Dynastic planning: a 7-Step Approach to Family Business Succession Planning and Related Conflict Management*.

For more information on Walid S. Chiniara, please consult his personal website: walid@walidchiniara.com

Walid S. Chiniara, in numbers



- 1** ≈40 Years practicing law across 5 continents
- 2** ≈25 Years exclusively serving business families
- 3** +10,000 conversations
- 4** 165 families in business
- 5** +250 senior founders
- 6** 100s of conferences lectures, and articles
- 7** > B\$750 under management
- 8** +1500 NextGen
- 9** 75 countries

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