



19 July 2021

To Whom it May Concern,

On behalf of my sister, father and myself I would like to strongly recommend you consider engaging Robert Powell as part of your succession planning journey.

After working together in our family business for over 10 years our family found we were rarely discussing the topic of succession, we were too busy working in the business to worry too much about how to manage transition. However, as the years ticked on the topic became more urgent and we decided to help us get focussed and a clear outline of decisions to be made we engaged with Robert Powell at Grant Thornton.

Succession planning is incredibly personal and its important you engage with an experienced advisor that all generations are comfortable with. After considering many proposals we collectively agreed that Robert was the best fit for us. We all felt comfortable to speak transparently with Robert and felt we could trust him to guide us in creating a succession plan.

Robert facilitated interviews with the key members of our family in both first and second generation. We met together as a family as well as had one on sessions with Robert. With the information gathered through these interviews Robert put together a succession action plan using the FREEDOM framework. It was fantastic, we were quickly able to identify where the family members were aligned and very clear on those areas that we were not aligned. The process uncovered some topics and views that had never been discussed before! Most importantly we came away with a list of things to discuss/decide which we then used over the following years to help us prepare. Succession takes many conversations, some easy and some are hard and with Robert's plan we were always able to stay on track.

I highly recommend you take advantage of Robert's years of experience, you will be more prepared as a result.

Kind Regards,

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