

# Global Business Succession and Transfer Planning Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Business Succession and Transfer Planning market size was valued at US\$ 18757 million in 2025 and is forecast to a readjusted size of US\$ 29691 million by 2032 with a CAGR of 6.8% during review period.

Business Succession and Transfer Planning refers to the systematic and forward-looking planning and execution services provided by professional institutions to business owners and their families or shareholders, focusing on the critical event of the transfer of ownership, control, and management rights in the future. Its core objective is to ensure business continuity, control risks, optimize tax and legal structures, and achieve the long-term stable transfer of business value and family wealth during generational changes or exits from the business.

### Gross Profit Margin Levels

The profit structure of business succession and transfer planning is essentially still "human capital-intensive professional services." In large conglomerates (accounting firms/consulting companies/private banks), project gross profit margins are primarily influenced by the proportion of expert working hours, the degree of standardization in delivery, the complexity of cross-border compliance, and whether long-term trusteeship (family office, trust management, investment management) is involved. Highly standardized projects in small and medium-sized enterprises can often push gross profit margins to a higher range through templated tools and process management; while highly customized cross-border structural design, family governance, and succession planning projects, although priced higher, rely more on senior partners and multi-

disciplinary teams, resulting in a lower gross profit margin. Overall, the industry's common project gross profit margins are roughly between 35% and 60%; projects focused on "consulting/tax/legal documentation" typically have higher margins, while projects focused on "transaction execution/M&A matchmaking/multi-jurisdictional compliance coordination" fluctuate more, but if they can be converted into long-term trustees and annual retainers, the overall profit quality will significantly improve.

## Industry Drivers

The core driving force behind this industry's growth is the intensive period of intergenerational succession of businesses and wealth globally. The aging of founders, increasing pressure on intergenerational continuity in family businesses, and stricter tax and regulatory systems across multiple jurisdictions mean that relying solely on wills or verbal arrangements is increasingly insufficient to cover real risks. Public materials from J.P. Morgan indicate that many business owners still tend to delay succession, missing the optimal window for transition. Institutions such as UBS and HSBC also emphasize the need for systematic planning and execution several years in advance to mitigate family conflicts, tax risks, and business continuity risks. On the other hand, corporate value increasingly stems from brand, data, equity incentives, and cross-border asset allocation. A single "equity transfer" is no longer sufficient for succession. Industry demands are expanding to governance systems (family charters/family committees), successor capacity building, funding and insurance arrangements, trust/foundation structures, and multi-path exit strategies such as sales/mergers/ESOPs, thereby driving a simultaneous increase in average order value and penetration rate of ongoing services.

This report is a detailed and comprehensive analysis for global Business Succession and Transfer Planning market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global Business Succession and Transfer Planning market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Business Succession and Transfer Planning market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Business Succession and Transfer Planning market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Business Succession and Transfer Planning market shares of main players, in revenue (\$ Million), 2021-2026

### **The Primary Objectives in This Report Are:**

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Business Succession and Transfer Planning

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Business Succession and Transfer Planning market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Deloitte, PwC, EY, KPMG, BDO, RSM, Grant Thornton, Baker Tilly, Crowe, Forvis Mazars, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market segmentation

Business Succession and Transfer Planning market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Ownership Succession

Control Succession

Management Succession

## Market segment by Service Model

Customized Consulting

Technology-Enabled

Full-Process Managed Services

## Market segment by Inheritance Path

Internal Inheritance

External Transfer

## Market segment by Application

Manufacturing

Finance and Wealth Management

Technology and Internet

Others

## Market segment by players, this report covers

Deloitte

PwC

EY

KPMG

BDO

RSM

Grant Thornton

Baker Tilly

Crowe

Forvis Mazars

J.P. Morgan

HSBC Global Private Banking

Morgan Stanley

Goldman Sachs

Citi Private Bank

Julius Baer

Pictet

Lombard Odier

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 13 chapters:**

Chapter 1, to describe Business Succession and Transfer Planning product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Business Succession and Transfer Planning, with revenue, gross margin, and global market share of Business Succession and Transfer Planning from 2021 to 2026.

Chapter 3, the Business Succession and Transfer Planning competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Business Succession and Transfer Planning market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Business Succession and Transfer Planning.

Chapter 13, to describe Business Succession and Transfer Planning research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Classification of Business Succession and Transfer Planning by Type

1.3.1 Overview: Global Business Succession and Transfer Planning Market Size by Type: 2021 Versus 2025 Versus 2032

1.3.2 Global Business Succession and Transfer Planning Consumption Value Market Share by Type in 2025

1.3.3 Ownership Succession

1.3.4 Control Succession

1.3.5 Management Succession

1.4 Classification of Business Succession and Transfer Planning by Service Model

1.4.1 Overview: Global Business Succession and Transfer Planning Market Size by Service Model: 2021 Versus 2025 Versus 2032

1.4.2 Global Business Succession and Transfer Planning Consumption Value Market Share by Service Model in 2025

1.4.3 Customized Consulting

1.4.4 Technology-Enabled

1.4.5 Full-Process Managed Services

1.5 Classification of Business Succession and Transfer Planning by Inheritance Path

1.5.1 Overview: Global Business Succession and Transfer Planning Market Size by Inheritance Path: 2021 Versus 2025 Versus 2032

1.5.2 Global Business Succession and Transfer Planning Consumption Value Market Share by Inheritance Path in 2025

1.5.3 Internal Inheritance

1.5.4 External Transfer

1.6 Global Business Succession and Transfer Planning Market by Application

1.6.1 Overview: Global Business Succession and Transfer Planning Market Size by Application: 2021 Versus 2025 Versus 2032

1.6.2 Manufacturing

1.6.3 Finance and Wealth Management

1.6.4 Technology and Internet

1.6.5 Others

1.7 Global Business Succession and Transfer Planning Market Size & Forecast

1.8 Global Business Succession and Transfer Planning Market Size and Forecast by Region

1.8.1 Global Business Succession and Transfer Planning Market Size by Region: 2021 VS 2025 VS 2032

1.8.2 Global Business Succession and Transfer Planning Market Size by Region, (2021-2032)

1.8.3 North America Business Succession and Transfer Planning Market Size and Prospect (2021-2032)

1.8.4 Europe Business Succession and Transfer Planning Market Size and Prospect (2021-2032)

1.8.5 Asia-Pacific Business Succession and Transfer Planning Market Size and Prospect (2021-2032)

1.8.6 South America Business Succession and Transfer Planning Market Size and Prospect (2021-2032)

1.8.7 Middle East & Africa Business Succession and Transfer Planning Market Size and Prospect (2021-2032)

## **2 COMPANY PROFILES**

### 2.1 Deloitte

2.1.1 Deloitte Details

2.1.2 Deloitte Major Business

2.1.3 Deloitte Business Succession and Transfer Planning Product and Solutions

2.1.4 Deloitte Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Deloitte Recent Developments and Future Plans

### 2.2 PwC

2.2.1 PwC Details

2.2.2 PwC Major Business

2.2.3 PwC Business Succession and Transfer Planning Product and Solutions

2.2.4 PwC Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 PwC Recent Developments and Future Plans

### 2.3 EY

2.3.1 EY Details

2.3.2 EY Major Business

2.3.3 EY Business Succession and Transfer Planning Product and Solutions

2.3.4 EY Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 EY Recent Developments and Future Plans

### 2.4 KPMG

- 2.4.1 KPMG Details
- 2.4.2 KPMG Major Business
- 2.4.3 KPMG Business Succession and Transfer Planning Product and Solutions
- 2.4.4 KPMG Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
- 2.4.5 KPMG Recent Developments and Future Plans
- 2.5 BDO
  - 2.5.1 BDO Details
  - 2.5.2 BDO Major Business
  - 2.5.3 BDO Business Succession and Transfer Planning Product and Solutions
  - 2.5.4 BDO Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.5.5 BDO Recent Developments and Future Plans
- 2.6 RSM
  - 2.6.1 RSM Details
  - 2.6.2 RSM Major Business
  - 2.6.3 RSM Business Succession and Transfer Planning Product and Solutions
  - 2.6.4 RSM Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.6.5 RSM Recent Developments and Future Plans
- 2.7 Grant Thornton
  - 2.7.1 Grant Thornton Details
  - 2.7.2 Grant Thornton Major Business
  - 2.7.3 Grant Thornton Business Succession and Transfer Planning Product and Solutions
  - 2.7.4 Grant Thornton Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.7.5 Grant Thornton Recent Developments and Future Plans
- 2.8 Baker Tilly
  - 2.8.1 Baker Tilly Details
  - 2.8.2 Baker Tilly Major Business
  - 2.8.3 Baker Tilly Business Succession and Transfer Planning Product and Solutions
  - 2.8.4 Baker Tilly Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.8.5 Baker Tilly Recent Developments and Future Plans
- 2.9 Crowe
  - 2.9.1 Crowe Details
  - 2.9.2 Crowe Major Business
  - 2.9.3 Crowe Business Succession and Transfer Planning Product and Solutions

2.9.4 Crowe Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 Crowe Recent Developments and Future Plans

2.10 Forvis Mazars

2.10.1 Forvis Mazars Details

2.10.2 Forvis Mazars Major Business

2.10.3 Forvis Mazars Business Succession and Transfer Planning Product and Solutions

2.10.4 Forvis Mazars Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 Forvis Mazars Recent Developments and Future Plans

2.11 J.P. Morgan

2.11.1 J.P. Morgan Details

2.11.2 J.P. Morgan Major Business

2.11.3 J.P. Morgan Business Succession and Transfer Planning Product and Solutions

2.11.4 J.P. Morgan Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 J.P. Morgan Recent Developments and Future Plans

2.12 HSBC Global Private Banking

2.12.1 HSBC Global Private Banking Details

2.12.2 HSBC Global Private Banking Major Business

2.12.3 HSBC Global Private Banking Business Succession and Transfer Planning Product and Solutions

2.12.4 HSBC Global Private Banking Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 HSBC Global Private Banking Recent Developments and Future Plans

2.13 Morgan Stanley

2.13.1 Morgan Stanley Details

2.13.2 Morgan Stanley Major Business

2.13.3 Morgan Stanley Business Succession and Transfer Planning Product and Solutions

2.13.4 Morgan Stanley Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Morgan Stanley Recent Developments and Future Plans

2.14 Goldman Sachs

2.14.1 Goldman Sachs Details

2.14.2 Goldman Sachs Major Business

2.14.3 Goldman Sachs Business Succession and Transfer Planning Product and Solutions

- 2.14.4 Goldman Sachs Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
- 2.14.5 Goldman Sachs Recent Developments and Future Plans
- 2.15 Citi Private Bank
  - 2.15.1 Citi Private Bank Details
  - 2.15.2 Citi Private Bank Major Business
  - 2.15.3 Citi Private Bank Business Succession and Transfer Planning Product and Solutions
  - 2.15.4 Citi Private Bank Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.15.5 Citi Private Bank Recent Developments and Future Plans
- 2.16 Julius Baer
  - 2.16.1 Julius Baer Details
  - 2.16.2 Julius Baer Major Business
  - 2.16.3 Julius Baer Business Succession and Transfer Planning Product and Solutions
  - 2.16.4 Julius Baer Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.16.5 Julius Baer Recent Developments and Future Plans
- 2.17 Pictet
  - 2.17.1 Pictet Details
  - 2.17.2 Pictet Major Business
  - 2.17.3 Pictet Business Succession and Transfer Planning Product and Solutions
  - 2.17.4 Pictet Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.17.5 Pictet Recent Developments and Future Plans
- 2.18 Lombard Odier
  - 2.18.1 Lombard Odier Details
  - 2.18.2 Lombard Odier Major Business
  - 2.18.3 Lombard Odier Business Succession and Transfer Planning Product and Solutions
  - 2.18.4 Lombard Odier Business Succession and Transfer Planning Revenue, Gross Margin and Market Share (2021-2026)
  - 2.18.5 Lombard Odier Recent Developments and Future Plans

### **3 MARKET COMPETITION, BY PLAYERS**

- 3.1 Global Business Succession and Transfer Planning Revenue and Share by Players (2021-2026)
- 3.2 Market Share Analysis (2025)

- 3.2.1 Market Share of Business Succession and Transfer Planning by Company Revenue
- 3.2.2 Top 3 Business Succession and Transfer Planning Players Market Share in 2025
- 3.2.3 Top 6 Business Succession and Transfer Planning Players Market Share in 2025
- 3.3 Business Succession and Transfer Planning Market: Overall Company Footprint Analysis
  - 3.3.1 Business Succession and Transfer Planning Market: Region Footprint
  - 3.3.2 Business Succession and Transfer Planning Market: Company Product Type Footprint
  - 3.3.3 Business Succession and Transfer Planning Market: Company Product Application Footprint
- 3.4 New Market Entrants and Barriers to Market Entry
- 3.5 Mergers, Acquisition, Agreements, and Collaborations

## **4 MARKET SIZE SEGMENT BY TYPE**

- 4.1 Global Business Succession and Transfer Planning Consumption Value and Market Share by Type (2021-2026)
- 4.2 Global Business Succession and Transfer Planning Market Forecast by Type (2027-2032)

## **5 MARKET SIZE SEGMENT BY APPLICATION**

- 5.1 Global Business Succession and Transfer Planning Consumption Value Market Share by Application (2021-2026)
- 5.2 Global Business Succession and Transfer Planning Market Forecast by Application (2027-2032)

## **6 NORTH AMERICA**

- 6.1 North America Business Succession and Transfer Planning Consumption Value by Type (2021-2032)
- 6.2 North America Business Succession and Transfer Planning Market Size by Application (2021-2032)
- 6.3 North America Business Succession and Transfer Planning Market Size by Country
  - 6.3.1 North America Business Succession and Transfer Planning Consumption Value by Country (2021-2032)
  - 6.3.2 United States Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

6.3.3 Canada Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

6.3.4 Mexico Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

## **7 EUROPE**

7.1 Europe Business Succession and Transfer Planning Consumption Value by Type (2021-2032)

7.2 Europe Business Succession and Transfer Planning Consumption Value by Application (2021-2032)

7.3 Europe Business Succession and Transfer Planning Market Size by Country

7.3.1 Europe Business Succession and Transfer Planning Consumption Value by Country (2021-2032)

7.3.2 Germany Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

7.3.3 France Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

7.3.4 United Kingdom Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

7.3.5 Russia Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

7.3.6 Italy Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

## **8 ASIA-PACIFIC**

8.1 Asia-Pacific Business Succession and Transfer Planning Consumption Value by Type (2021-2032)

8.2 Asia-Pacific Business Succession and Transfer Planning Consumption Value by Application (2021-2032)

8.3 Asia-Pacific Business Succession and Transfer Planning Market Size by Region

8.3.1 Asia-Pacific Business Succession and Transfer Planning Consumption Value by Region (2021-2032)

8.3.2 China Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

8.3.3 Japan Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

8.3.4 South Korea Business Succession and Transfer Planning Market Size and

Forecast (2021-2032)

8.3.5 India Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

8.3.6 Southeast Asia Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

8.3.7 Australia Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

## **9 SOUTH AMERICA**

9.1 South America Business Succession and Transfer Planning Consumption Value by Type (2021-2032)

9.2 South America Business Succession and Transfer Planning Consumption Value by Application (2021-2032)

9.3 South America Business Succession and Transfer Planning Market Size by Country

9.3.1 South America Business Succession and Transfer Planning Consumption Value by Country (2021-2032)

9.3.2 Brazil Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

9.3.3 Argentina Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

## **10 MIDDLE EAST & AFRICA**

10.1 Middle East & Africa Business Succession and Transfer Planning Consumption Value by Type (2021-2032)

10.2 Middle East & Africa Business Succession and Transfer Planning Consumption Value by Application (2021-2032)

10.3 Middle East & Africa Business Succession and Transfer Planning Market Size by Country

10.3.1 Middle East & Africa Business Succession and Transfer Planning Consumption Value by Country (2021-2032)

10.3.2 Turkey Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

10.3.3 Saudi Arabia Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

10.3.4 UAE Business Succession and Transfer Planning Market Size and Forecast (2021-2032)

## **11 MARKET DYNAMICS**

- 11.1 Business Succession and Transfer Planning Market Drivers
- 11.2 Business Succession and Transfer Planning Market Restraints
- 11.3 Business Succession and Transfer Planning Trends Analysis
- 11.4 Porters Five Forces Analysis
  - 11.4.1 Threat of New Entrants
  - 11.4.2 Bargaining Power of Suppliers
  - 11.4.3 Bargaining Power of Buyers
  - 11.4.4 Threat of Substitutes
  - 11.4.5 Competitive Rivalry

## **12 INDUSTRY CHAIN ANALYSIS**

- 12.1 Business Succession and Transfer Planning Industry Chain
- 12.2 Business Succession and Transfer Planning Upstream Analysis
- 12.3 Business Succession and Transfer Planning Midstream Analysis
- 12.4 Business Succession and Transfer Planning Downstream Analysis

## **13 RESEARCH FINDINGS AND CONCLUSION**

## **14 APPENDIX**

- 14.1 Methodology
- 14.2 Research Process and Data Source
- 14.3 Disclaimer

## List Of Tables

### LIST OF TABLES

- Table 1. Global Business Succession and Transfer Planning Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
- Table 2. Global Business Succession and Transfer Planning Consumption Value by Service Model, (USD Million), 2021 & 2025 & 2032
- Table 3. Global Business Succession and Transfer Planning Consumption Value by Inheritance Path, (USD Million), 2021 & 2025 & 2032
- Table 4. Global Business Succession and Transfer Planning Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 5. Global Business Succession and Transfer Planning Consumption Value by Region (2021-2026) & (USD Million)
- Table 6. Global Business Succession and Transfer Planning Consumption Value by Region (2027-2032) & (USD Million)
- Table 7. Deloitte Company Information, Head Office, and Major Competitors
- Table 8. Deloitte Major Business
- Table 9. Deloitte Business Succession and Transfer Planning Product and Solutions
- Table 10. Deloitte Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 11. Deloitte Recent Developments and Future Plans
- Table 12. PwC Company Information, Head Office, and Major Competitors
- Table 13. PwC Major Business
- Table 14. PwC Business Succession and Transfer Planning Product and Solutions
- Table 15. PwC Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 16. PwC Recent Developments and Future Plans
- Table 17. EY Company Information, Head Office, and Major Competitors
- Table 18. EY Major Business
- Table 19. EY Business Succession and Transfer Planning Product and Solutions
- Table 20. EY Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 21. KPMG Company Information, Head Office, and Major Competitors
- Table 22. KPMG Major Business
- Table 23. KPMG Business Succession and Transfer Planning Product and Solutions
- Table 24. KPMG Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 25. KPMG Recent Developments and Future Plans

- Table 26. BDO Company Information, Head Office, and Major Competitors
- Table 27. BDO Major Business
- Table 28. BDO Business Succession and Transfer Planning Product and Solutions
- Table 29. BDO Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 30. BDO Recent Developments and Future Plans
- Table 31. RSM Company Information, Head Office, and Major Competitors
- Table 32. RSM Major Business
- Table 33. RSM Business Succession and Transfer Planning Product and Solutions
- Table 34. RSM Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 35. RSM Recent Developments and Future Plans
- Table 36. Grant Thornton Company Information, Head Office, and Major Competitors
- Table 37. Grant Thornton Major Business
- Table 38. Grant Thornton Business Succession and Transfer Planning Product and Solutions
- Table 39. Grant Thornton Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 40. Grant Thornton Recent Developments and Future Plans
- Table 41. Baker Tilly Company Information, Head Office, and Major Competitors
- Table 42. Baker Tilly Major Business
- Table 43. Baker Tilly Business Succession and Transfer Planning Product and Solutions
- Table 44. Baker Tilly Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 45. Baker Tilly Recent Developments and Future Plans
- Table 46. Crowe Company Information, Head Office, and Major Competitors
- Table 47. Crowe Major Business
- Table 48. Crowe Business Succession and Transfer Planning Product and Solutions
- Table 49. Crowe Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 50. Crowe Recent Developments and Future Plans
- Table 51. Forvis Mazars Company Information, Head Office, and Major Competitors
- Table 52. Forvis Mazars Major Business
- Table 53. Forvis Mazars Business Succession and Transfer Planning Product and Solutions
- Table 54. Forvis Mazars Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 55. Forvis Mazars Recent Developments and Future Plans

Table 56. J.P. Morgan Company Information, Head Office, and Major Competitors

Table 57. J.P. Morgan Major Business

Table 58. J.P. Morgan Business Succession and Transfer Planning Product and Solutions

Table 59. J.P. Morgan Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 60. J.P. Morgan Recent Developments and Future Plans

Table 61. HSBC Global Private Banking Company Information, Head Office, and Major Competitors

Table 62. HSBC Global Private Banking Major Business

Table 63. HSBC Global Private Banking Business Succession and Transfer Planning Product and Solutions

Table 64. HSBC Global Private Banking Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. HSBC Global Private Banking Recent Developments and Future Plans

Table 66. Morgan Stanley Company Information, Head Office, and Major Competitors

Table 67. Morgan Stanley Major Business

Table 68. Morgan Stanley Business Succession and Transfer Planning Product and Solutions

Table 69. Morgan Stanley Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 70. Morgan Stanley Recent Developments and Future Plans

Table 71. Goldman Sachs Company Information, Head Office, and Major Competitors

Table 72. Goldman Sachs Major Business

Table 73. Goldman Sachs Business Succession and Transfer Planning Product and Solutions

Table 74. Goldman Sachs Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 75. Goldman Sachs Recent Developments and Future Plans

Table 76. Citi Private Bank Company Information, Head Office, and Major Competitors

Table 77. Citi Private Bank Major Business

Table 78. Citi Private Bank Business Succession and Transfer Planning Product and Solutions

Table 79. Citi Private Bank Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 80. Citi Private Bank Recent Developments and Future Plans

Table 81. Julius Baer Company Information, Head Office, and Major Competitors

Table 82. Julius Baer Major Business

Table 83. Julius Baer Business Succession and Transfer Planning Product and

## Solutions

Table 84. Julius Baer Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Julius Baer Recent Developments and Future Plans

Table 86. Pictet Company Information, Head Office, and Major Competitors

Table 87. Pictet Major Business

Table 88. Pictet Business Succession and Transfer Planning Product and Solutions

Table 89. Pictet Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Pictet Recent Developments and Future Plans

Table 91. Lombard Odier Company Information, Head Office, and Major Competitors

Table 92. Lombard Odier Major Business

Table 93. Lombard Odier Business Succession and Transfer Planning Product and Solutions

Table 94. Lombard Odier Business Succession and Transfer Planning Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 95. Lombard Odier Recent Developments and Future Plans

Table 96. Global Business Succession and Transfer Planning Revenue (USD Million) by Players (2021-2026)

Table 97. Global Business Succession and Transfer Planning Revenue Share by Players (2021-2026)

Table 98. Breakdown of Business Succession and Transfer Planning by Company Type (Tier 1, Tier 2, and Tier 3)

Table 99. Market Position of Players in Business Succession and Transfer Planning, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 100. Head Office of Key Business Succession and Transfer Planning Players

Table 101. Business Succession and Transfer Planning Market: Company Product Type Footprint

Table 102. Business Succession and Transfer Planning Market: Company Product Application Footprint

Table 103. Business Succession and Transfer Planning New Market Entrants and Barriers to Market Entry

Table 104. Business Succession and Transfer Planning Mergers, Acquisition, Agreements, and Collaborations

Table 105. Global Business Succession and Transfer Planning Consumption Value (USD Million) by Type (2021-2026)

Table 106. Global Business Succession and Transfer Planning Consumption Value Share by Type (2021-2026)

Table 107. Global Business Succession and Transfer Planning Consumption Value

## Forecast by Type (2027-2032)

Table 108. Global Business Succession and Transfer Planning Consumption Value by Application (2021-2026)

Table 109. Global Business Succession and Transfer Planning Consumption Value Forecast by Application (2027-2032)

Table 110. North America Business Succession and Transfer Planning Consumption Value by Type (2021-2026) & (USD Million)

Table 111. North America Business Succession and Transfer Planning Consumption Value by Type (2027-2032) & (USD Million)

Table 112. North America Business Succession and Transfer Planning Consumption Value by Application (2021-2026) & (USD Million)

Table 113. North America Business Succession and Transfer Planning Consumption Value by Application (2027-2032) & (USD Million)

Table 114. North America Business Succession and Transfer Planning Consumption Value by Country (2021-2026) & (USD Million)

Table 115. North America Business Succession and Transfer Planning Consumption Value by Country (2027-2032) & (USD Million)

Table 116. Europe Business Succession and Transfer Planning Consumption Value by Type (2021-2026) & (USD Million)

Table 117. Europe Business Succession and Transfer Planning Consumption Value by Type (2027-2032) & (USD Million)

Table 118. Europe Business Succession and Transfer Planning Consumption Value by Application (2021-2026) & (USD Million)

Table 119. Europe Business Succession and Transfer Planning Consumption Value by Application (2027-2032) & (USD Million)

Table 120. Europe Business Succession and Transfer Planning Consumption Value by Country (2021-2026) & (USD Million)

Table 121. Europe Business Succession and Transfer Planning Consumption Value by Country (2027-2032) & (USD Million)

Table 122. Asia-Pacific Business Succession and Transfer Planning Consumption Value by Type (2021-2026) & (USD Million)

Table 123. Asia-Pacific Business Succession and Transfer Planning Consumption Value by Type (2027-2032) & (USD Million)

Table 124. Asia-Pacific Business Succession and Transfer Planning Consumption Value by Application (2021-2026) & (USD Million)

Table 125. Asia-Pacific Business Succession and Transfer Planning Consumption Value by Application (2027-2032) & (USD Million)

Table 126. Asia-Pacific Business Succession and Transfer Planning Consumption Value by Region (2021-2026) & (USD Million)

Table 127. Asia-Pacific Business Succession and Transfer Planning Consumption Value by Region (2027-2032) & (USD Million)

Table 128. South America Business Succession and Transfer Planning Consumption Value by Type (2021-2026) & (USD Million)

Table 129. South America Business Succession and Transfer Planning Consumption Value by Type (2027-2032) & (USD Million)

Table 130. South America Business Succession and Transfer Planning Consumption Value by Application (2021-2026) & (USD Million)

Table 131. South America Business Succession and Transfer Planning Consumption Value by Application (2027-2032) & (USD Million)

Table 132. South America Business Succession and Transfer Planning Consumption Value by Country (2021-2026) & (USD Million)

Table 133. South America Business Succession and Transfer Planning Consumption Value by Country (2027-2032) & (USD Million)

Table 134. Middle East & Africa Business Succession and Transfer Planning Consumption Value by Type (2021-2026) & (USD Million)

Table 135. Middle East & Africa Business Succession and Transfer Planning Consumption Value by Type (2027-2032) & (USD Million)

Table 136. Middle East & Africa Business Succession and Transfer Planning Consumption Value by Application (2021-2026) & (USD Million)

Table 137. Middle East & Africa Business Succession and Transfer Planning Consumption Value by Application (2027-2032) & (USD Million)

Table 138. Middle East & Africa Business Succession and Transfer Planning Consumption Value by Country (2021-2026) & (USD Million)

Table 139. Middle East & Africa Business Succession and Transfer Planning Consumption Value by Country (2027-2032) & (USD Million)

Table 140. Global Key Players of Business Succession and Transfer Planning Upstream (Raw Materials)

Table 141. Global Business Succession and Transfer Planning Typical Customers

## List Of Figures

### LIST OF FIGURES

- Figure 1. Business Succession and Transfer Planning Picture
- Figure 2. Global Business Succession and Transfer Planning Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Business Succession and Transfer Planning Consumption Value Market Share by Type in 2025
- Figure 4. Ownership Succession
- Figure 5. Control Succession
- Figure 6. Management Succession
- Figure 7. Global Business Succession and Transfer Planning Consumption Value by Service Model, (USD Million), 2021 & 2025 & 2032
- Figure 8. Global Business Succession and Transfer Planning Consumption Value Market Share by Service Model in 2025
- Figure 9. Customized Consulting
- Figure 10. Technology-Enabled
- Figure 11. Full-Process Managed Services
- Figure 12. Global Business Succession and Transfer Planning Consumption Value by Inheritance Path, (USD Million), 2021 & 2025 & 2032
- Figure 13. Global Business Succession and Transfer Planning Consumption Value Market Share by Inheritance Path in 2025
- Figure 14. Internal Inheritance
- Figure 15. External Transfer
- Figure 16. Global Business Succession and Transfer Planning Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 17. Business Succession and Transfer Planning Consumption Value Market Share by Application in 2025
- Figure 18. Manufacturing Picture
- Figure 19. Finance and Wealth Management Picture
- Figure 20. Technology and Internet Picture
- Figure 21. Others Picture
- Figure 22. Global Business Succession and Transfer Planning Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 23. Global Business Succession and Transfer Planning Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 24. Global Market Business Succession and Transfer Planning Consumption Value (USD Million) Comparison by Region (2021 VS 2025 VS 2032)

Figure 25. Global Business Succession and Transfer Planning Consumption Value Market Share by Region (2021-2032)

Figure 26. Global Business Succession and Transfer Planning Consumption Value Market Share by Region in 2025

Figure 27. North America Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 28. Europe Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 29. Asia-Pacific Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 30. South America Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 31. Middle East & Africa Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 32. Company Three Recent Developments and Future Plans

Figure 33. Global Business Succession and Transfer Planning Revenue Share by Players in 2025

Figure 34. Business Succession and Transfer Planning Market Share by Company Type (Tier 1, Tier 2, and Tier 3) in 2025

Figure 35. Market Share of Business Succession and Transfer Planning by Player Revenue in 2025

Figure 36. Top 3 Business Succession and Transfer Planning Players Market Share in 2025

Figure 37. Top 6 Business Succession and Transfer Planning Players Market Share in 2025

Figure 38. Global Business Succession and Transfer Planning Consumption Value Share by Type (2021-2026)

Figure 39. Global Business Succession and Transfer Planning Market Share Forecast by Type (2027-2032)

Figure 40. Global Business Succession and Transfer Planning Consumption Value Share by Application (2021-2026)

Figure 41. Global Business Succession and Transfer Planning Market Share Forecast by Application (2027-2032)

Figure 42. North America Business Succession and Transfer Planning Consumption Value Market Share by Type (2021-2032)

Figure 43. North America Business Succession and Transfer Planning Consumption Value Market Share by Application (2021-2032)

Figure 44. North America Business Succession and Transfer Planning Consumption Value Market Share by Country (2021-2032)

Figure 45. United States Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 46. Canada Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 47. Mexico Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 48. Europe Business Succession and Transfer Planning Consumption Value Market Share by Type (2021-2032)

Figure 49. Europe Business Succession and Transfer Planning Consumption Value Market Share by Application (2021-2032)

Figure 50. Europe Business Succession and Transfer Planning Consumption Value Market Share by Country (2021-2032)

Figure 51. Germany Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 52. France Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 53. United Kingdom Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 54. Russia Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 55. Italy Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 56. Asia-Pacific Business Succession and Transfer Planning Consumption Value Market Share by Type (2021-2032)

Figure 57. Asia-Pacific Business Succession and Transfer Planning Consumption Value Market Share by Application (2021-2032)

Figure 58. Asia-Pacific Business Succession and Transfer Planning Consumption Value Market Share by Region (2021-2032)

Figure 59. China Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 60. Japan Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 61. South Korea Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 62. India Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 63. Southeast Asia Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 64. Australia Business Succession and Transfer Planning Consumption Value

(2021-2032) & (USD Million)

Figure 65. South America Business Succession and Transfer Planning Consumption Value Market Share by Type (2021-2032)

Figure 66. South America Business Succession and Transfer Planning Consumption Value Market Share by Application (2021-2032)

Figure 67. South America Business Succession and Transfer Planning Consumption Value Market Share by Country (2021-2032)

Figure 68. Brazil Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 69. Argentina Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 70. Middle East & Africa Business Succession and Transfer Planning Consumption Value Market Share by Type (2021-2032)

Figure 71. Middle East & Africa Business Succession and Transfer Planning Consumption Value Market Share by Application (2021-2032)

Figure 72. Middle East & Africa Business Succession and Transfer Planning Consumption Value Market Share by Country (2021-2032)

Figure 73. Turkey Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 74. Saudi Arabia Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 75. UAE Business Succession and Transfer Planning Consumption Value (2021-2032) & (USD Million)

Figure 76. Business Succession and Transfer Planning Market Drivers

Figure 77. Business Succession and Transfer Planning Market Restraints

Figure 78. Business Succession and Transfer Planning Market Trends

Figure 79. Porters Five Forces Analysis

Figure 80. Business Succession and Transfer Planning Industrial Chain

Figure 81. Methodology

Figure 82. Research Process and Data Source

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