



Client Services

- Bank Mediation

When the business banking relationship is not as it should be, the business is either in “bad bank” or looking to be transferred to that department. The core business, with care and attention, will survive.

\$ _____ per hour.

A report and action plan will be provided by \$LM Group to the client after all meetings held.

Meetings will involve some or all of the following:

- Mediation meetings jointly between \$LM Group, the Bank and the client

- Regular client meetings

- Structure work with the client

- Action planning for the way forward

- Potential refinance or new Bank

The ongoing retainer is available to ensure the business remains on track. The retainer lasts for one year. The client will meet with the \$LM Group monthly.

\$350.00 per month. **ACCEPT RETAINER OPTION / DECLINE RETAINER OPTION (delete as applicable)**

- Bank Tender

The \$LM Group will work with the client to get the various Banks (as specified by the client) **to tender for their business / part of their business / the whole banking relationship (delete as applicable)**.

\$1500 minimum two institutions approached, **\$800** per additional institution

The client will have final sign off on the report before the financial institutions are approached. The report will be paid for whether the client asks the \$LM Group to approach the chosen institutions or not.

- Bank Tender with increased finance requirement

The \$LM Group will work with the client to get the various Banks (as specified by the client) **to tender for their business / part of their business / the whole banking relationship (delete as applicable)**.

\$LM Group

\$1500 minimum two institutions approached, **\$800** per additional institution

The client will have final sign off on the report before the financial institutions are approached. The report will be paid for whether the client asks the \$LM Group to approach the chosen institutions or not.

2% success fee will be charged on the amount of the increased finance

- Assessment of Banking offers (offers of finance and/or entire banking relationship)
The client will provide the offers, in their entirety, to the \$LM Group. The \$LM Group will then assess these offers, highlight good and bad, and provide recommendations for the client to choose and make a decision.
\$2500 per report, maximum two offers assessed, \$1250 per additional offer to assess.

- Complete Banking Review

\$LM Group will meet with the client to perform some or all of the following:

- Current debt structure assessment

- Help the company understand how their current bankers perceive them

- Assess what could be done to help the debt structure suit the business strategy

Charging options:

Hourly fee **\$300** for “one off” reports

Quarterly reviews paid for monthly at **\$250** per month

Monthly reviews paid for monthly at **\$650** per month

Reviews will be undertaken with the client. It is anticipated each review takes a minimum of 2 hours. The \$LM Group will provide a written report to the client after each review.

- Applications for business finance

To apply for business finance.

\$1750 report fee, maximum two institutions approached, **\$950** per additional institution

2% success fee chargeable upon offer of finance from Bank, as long as the business is able to meet all of the Bank's terms and conditions of offer.

- Other services available:

- Business plans

- Business Mentoring

PLEASE ASK FOR A QUOTE

Quotes can be given on any service to estimate time and cost of the requirement – please ask. Quotes will be given in writing and work will not begin until the quote has been accepted in writing.

Please email:

enquiries@slmgroup.co.nz