



Client Services Menu

Consultation

- Charged after free consultation if work is to be agreed upon but further details need to be supplied or worked upon by the client or \$LM Group. \$150 per hour
- Travel outside 100kms from Franklin carries a travel fee \$75 travel fee

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.

- o **\$hourly rate**

By negotiation

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

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 per month

Bank Tender and Finance

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 maximum 2 institutions
\$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 on increased finance

The success fee is charged upon the offer of finance and the client being able to meet any terms and conditions.

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
compared
\$1250 per additional
offer comparison

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
- 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.

\$300 per hour

OR

\$250 per month for one
review per quarter

OR

\$650 per month for
monthly reviews

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.