

Membership category	Reactive	Active	Proactive
Expected type/size of firm	Small firm	Several partner/director firm	Multi partner/director firm which already has team members who are full-time or nearly full-time offering corporate finance services, to meet needs of firm's clients but also attracts external deals
Firm's likely aims of corporate finance	no plans to offer a full time CF service but want to be able to manage ad hoc clients' requirements	wishes to continue to grow their business advisory & corporate finance service offering for existing clients & to attract new clients and are still building systems and team to do that	wishes to continue to build the number of corporate finance deals per year & to complete them more efficiently & more profitably
Estimated activity level	1-2 deals/year	6-12 deals/year	12-50 deals/year
Regulatory requirements	none	Regulated by ICAEW/ICAS/ACCA and licensed DPB or FCA	Regulated by ICAEW/ICAS/ACCA and licensed DPB or FCA
Minimum membership term	12 mths	12 mths	12 mths
Membership price (excluding research & other chargeable activities - see * below)	£100/mth plus optional skeleton resources GP Toolkit £500 one-off	£800/month per firm	£300/month per office
<b>Deal Origination (Profile &amp; Direct Client Work to create pipeline)</b>			
	<b>Reactive</b>	<b>Active</b>	<b>Proactive</b>
Community - email, whatsapp group, zoom huddles with a mastermind group	y	y	y
Profile & press - National press coverage of the brand; draft press releases to use locally; use of brand on your websites etc	y	y	y
Marketing - publication of your completed deal tombstones; network opportunities enewsletter; sharing 123 businesses for sale	y	y	y
CF Strategy & Progress meetings - 1 hour per month		y	
Introduction to exit planning	GP toolkit		
Flyers already designed (4) to raise awareness of buying or selling		y	
Work programmes - Exit route map & sellability quiz; financial healthcheck; bank overdraft scorecard & invoice finance checklist		y	
Playbooks - how to build pipeline corporate finance work		y	y
Access to Researcher - Circulation Valuation Workbook quarterly; Circulation Companies M&A criteria monthly; Sector reports; Post-deal marketing; M&A matching to build acquisitive clients	*	*	*
<b>Deal Cultivation (of client and firm)</b>			
	<b>Reactive</b>	<b>Active</b>	<b>Proactive</b>
Community - email, whatsapp group, zoom huddles with a mastermind group	y	y	y
Seminar slide or blog content drafts by Kirsty		y	
Exit planning workshop programme		y	
1 hour coaching per month from Kirsty		y	
123 Business Sales process for stage 1 (research & flyer); 123 Business Sales process for stage 2 (info pack)	*	*	*
Conferences & Rising Stars training days (national)	*	*	*
Using Kirsty to train staff or meet with partner/director groups	*	*	*
Using Kirsty to present at client events/webinars	*	*	*
Access to Researcher - buyer lists, target lists, or precedent deal multiples for valuations	*	*	*
<b>Deal Execution</b>			
	<b>Reactive</b>	<b>Active</b>	<b>Proactive</b>
Community - email, whatsapp group, zoom huddles with a mastermind group	y	y	y
Technical support (Kirsty on call/email) up to 2 hours per month		y	
Skeleton pack of key letters	GP toolkit	y	
Step by step guides to carry out funding, buy and sell assignments	GP toolkit	y	
Access to Researcher - Precedent deal multiples for valuations	*	*	*
123 Business Sales process for stage 1 (research & flyer); 123 Business Sales process for stage 2 (info pack)	*	*	*
Network deal price for Experian Market IQ	*	*	*
Equity database - coming soon	y	y	y
<b>* Additional Chargeable Benefits</b>			
	<b>Reactive</b>	<b>Active</b>	<b>Proactive</b>
Access to Researcher	£100/hr	£40/hr retainer (min 5hrs/mth) or £100/hr	£40/hr retainer (min 5hrs/mth) or £100/hr
Additional training or Presenting rate for Kirsty (up to 3 hours)	£1,000	£500	£1,000
123 Business Sales per stage for stages 1 & 2	£1,000	£500	£1,000
Network deal price for Experian Market IQ	request details	request details	request details
Conferences & Rising Stars Training Days	priced by event	priced by event	priced by event