

Membership category	Build Your Own	Growth	Established
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	either very small firm with occasional deals or established team with specific needs	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	varies	6-12 deals/year	12-50 deals/year
Regulatory requirements	Regulated by ICAEW/ICAS/ACCA and licensed DPB or FCA	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 resources	£800/month per firm	£300/month per office
Deal Origination (Profile & Direct Client Work to create pipeline)	Build Your Own	Growth	Established
Community - email, whatsapp group, zoom huddles with a mastermind group, national benchmarking survey	included	included	included
Profile & press - National press coverage of the brand; draft press releases to use locally; use of brand on your websites etc		y	y
Marketing - publication of your completed deal tombstones; network opportunities enewsletter; sharing 123 businesses for sale		y	y
CF Strategy & Progress meetings - 1 hour per month		y	
3 introductory tools - exit route map, target acquisition criteria, overdraft scorecard	GP toolkit*		
Flyers already designed (4) to raise awareness of buying or selling		y	
Work programmes incl exit planning workshop; financial healthcheck; acquisition ready programme		y	
Playbooks - set up and building a corporate finance service		y	y
Access to Research - Circulation Valuation Workbook quarterly; Sector reports; Post-deal marketing; M&A matching; Regional Reports		*	*
Deal Cultivation (of client and firm)	Build Your Own	Growth	Established
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 marketing processes to deliver as back-office support	*	*	*
National Conferences	*	*	*
Access to Kirsty to train staff or meet with partner/director groups	*	*	*
Access to Kirsty to present at client events/webinars	*	*	*
Access to Research - buyer lists, target lists, or precedent deal multiples for valuations		*	*
Deal Execution	Build Your Own	Growth	Established
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		y	
Step by step guides to carry out funding, buy and sell assignments		y	
Access to Research - Precedent deal multiples for valuations		*	*
123 Business Sales marketing processes to deliver as back-office support	*	*	*
Network preferential price for deals and company database	*	*	*
* Additional Chargeable Benefits	Build Your Own	Growth	Established
Access to Research	£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 & basic stage 2	£1,500	£1,000	£1,000
Network deal prices for deals and company database	request details	request details	request details
Conferences & Rising Stars Training Days	priced by event	priced by event	priced by event