

Membership category	Build Your Own	Growth	Established
	Reactive	Active	National
Expected type/size of firm	Small firm	Several partner/director firm	Multi CF in offices offering corporate finance services across the group to clients in all offices
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 pipeline of deals from the group & to complete them more efficiently & more profitably, to achieve a higher avg fee per client KPI for shareholders
Estimated activity level	varies	6-20 deals/year	30-100+ 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 main office	schedule of services to be agreed, including white-label & exclusive options
Deal Origination (Profile & Direct Client Work to create pipeline)			
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; Dealflow Briefing newsletter, Succession Newsletter, blogs; guides		y	y
CF Strategy & Progress meetings - onboarding firms 1 hour per month then as required		y	y
Flyers already designed (4) to raise awareness of buying or selling		y	whitelabelled
Work programmes incl exit planning workshop; financial healthcheck; acquisition ready programme; valuations		y	whitelabelled
Playbooks - set up and building a corporate finance service		y	
Access to Research - Circulation Valuation Workbook & Playbook quarterly; Sector reports/Market Reviews; M&A matching; Regional Reports, Current Affairs		*	*
Deal Cultivation (of client and firm)			
Community - email, whatsapp group, zoom huddles with a mastermind group	y	y	y
Seminar slide or blog content drafts by Kirsty		y	whitelabelled
Exit planning workshop programme		y	whitelabelled
1 hour coaching per month from Kirsty - onboarding firms then as required		y	as required across group
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, precedent deal multiples for valuations, current affairs, market reviews, age analyses		*	*
Deal Execution			
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	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 & Harvey AI	*	*	*
* Additional Chargeable Benefits			
	Build Your Own Reactive	Growth Active	Established National
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	request details	request details	request details
Conferences & Rising Stars Training Days	priced by event	priced by event	priced by event
Network deal prices for deals and company database & Harvey AI	request details	request details	request details