

In partnership with Portfolios we ask you to follow this process so we are prepared to discuss your deal/s with you.

Step One – Client Portfolio Summary	OUTCOME
Log onto www.portfolios.net.au and complete or Complete and fax in 02 4981 3725	We know you
Step Two –Complete and Forward Deal Summary	OUTCOME
Provides us with fundamental deal and deal partner information.	We know what you are trying to do and fundamental details
Step Three – Phone Meeting and Research	OUTCOME
Call us to arrange a time to discuss. The phone meeting typically takes place within 72 hours of booking Complete further deal research/ due diligence prior to meeting	Phone meeting booked You get further info
Step Four – Phone Meeting	OUTCOME
Because we know you, your story, your deal and deal partner we can discuss strategies on how to ...Make it Happen	Deal Yes/ No Further Action
THINGS YOU SHOULD KNOW	
<ol style="list-style-type: none"> 1. A maximum two (2) deals reviewed per meeting 2. We will not book nor take the phone meeting unless we have all the information 3. Be UPFRONT and HONEST on all details 4. Tell us about your deal partners (and potential ones) 5. You take it on to follow through and manage us 	
Potential Deal Partners	OUTCOME
They follow the same process Have them go to www.portfolios.net.au or complete Client Portfolio Review and fax to 02 4981 3725 You manage and follow through with all stakeholders	We know them and what they can do We all know your deal could work