

### **Background and Problem**

A fast growing and increasingly successful property investment company, in business for less than one year, had ambitions to provide innovative products and services in various sectors of the retail property market. Inherent in the marketing and packaging of such products was the ability to offer structured financing to investors to facilitate their investment.

The company wanted help with the preparation and presentation of information to issue to a broad range of financial institutions to support applications for financial assistance.

### **Actions Taken**

A LGBA member worked with the Directors to organize existing material in such a way that one document could serve all markets by dropping in and out specifically tailored sections. The document was structured as a business plan and the member contributed new sections, demonstrating the size and value of the transactions already undertaken and adding financial credence to the information.

A list was prepared of the target sectors within the financial community and the particular companies within each sector. Assistance was provided by using the member's network of associates to gain introductions at the right level within certain institutions, including main stream and other banks, insurance companies, and commercial finance brokers. Meetings with banks and other institutions were arranged, and one particular introduction to a US insurance company resulted in the creation of a specific insurance bond, a product which is so far unique in the UK market.

This has enabled the company to undertake further significant profit generating investments.

### **The Result**

The company has carried on with its innovative approach to property investments and is now seeking to leverage its position by obtaining a facility for its own use secured against this type of bond.

As often happens with the LGBA the member has continued to give advice and support and is now exploiting the network further to gain introductions to larger financial institutions and specialist banks. It is expected that a couple of individual development projects will be financed as a test of the company's power to deliver and that if successful a full facility will be made available.

**If you want to find out more about any of the areas covered in this case study  
and how we can support your business – contact us today.**