

When liaising with a 3rd party, understand which region their office caters for. Important to build up relationships early during your career. Late stage relationships can seem opportunistic.

- Private equity

Main examples in Birmingham: Beechtree; NorthEdge; LDC; Inbank House; Inflexion; Equistine; Orbis; BGF Fresh Equity

- Corporate finance advisors

Altium; Atlanta; Clearwater; Rothchilds; Springboard; Accounting firms

- Credit funds & Clearing banks

Work for lenders is normally model building. Credit funds are useful to obtain information about precedent deals.

- Regional accountants

Can have clients that want to sell, may have to provide a referral fee as no quid pro quo relationship

- Lawyers

Similar to above, but ensure dealing with partners. Can build a quid pro quo relationship.

- Wealth managers

Wealthy people wanting to sell their business will often contact their wealth managers for advice. CF advisors can build a quid pro quo relationship by referring ex-owners who have sold their business to wealth managers.

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