

# Introducing Quadrant Advisory

*Our purpose is to educate and assist business owners and directors to be proactive to get the best out of their financial relationships.*

Our advice will improve and strengthen your financial position through appropriate arrangements to meet your needs. We are responsive when it matters most and deliver results that give you peace of mind.

## WHAT QUADRANT ADVISORY IS NOT

Quadrant Advisory is not a finance broker.

- We do not accept upfront or other fees or trailing commissions from financiers or banks.
- Our fees are negotiated, success structured, fully disclosed and agreed up front with you.
- We are fiercely independent of financiers and will always act in the best interests of you, our client.

## WE CREATE VALUE FOR OUR CLIENTS BY:

- Our independence.
- Our profile.
- Our experience.
- Our knowledge.

## WHAT IS QUADRANT ADVISORY?

Quadrant Advisory works with business owners, directors and their banks to be proactive to get the best out of their relationships. Established by partners of one of the largest independent legal firms in Western Australia, Lavan, and an experienced former banker, Quadrant Advisory is a debt advisory, banking and risk management services firm bringing a banker's perspective to issues important to clients in Perth, regional Western Australia and nationally.

## WHAT QUADRANT ADVISORY DOES

The value of your business is maximised when we work as trusted advisors to deliver strategic business and financial advice to you. We can:

- Speed up decision making by assisting you in obtaining new and increased debt funding.
- Review your existing financing facilities and present information to your financier in a manner that meets your needs. We take into account a range of factors such as your relationship strength, debt structure, security provided, fees and pricing.
- Provide you with a banker's perspective in dealing with your financier by giving you a detailed understanding of banks' decision making processes including risk rating methodology, cost of capital assessment and lending appetite.
- Act as your advocate and assist you in discussions with your financier when there is a reduction in communication or a change in your risk profile.
- Help you talk to your bank about your succession plan and work with you to achieve your plan e.g. release of personal guarantees.
- Provide advice on risk management and corporate governance issues e.g. large debtor credit risk, Risk Appetite Statement.

Our team are experts in the financial services industry so can identify and assess your financial issues quickly and concisely. We can form a bridge between you and your financier to provide insightful and independent advice. We devise appropriate and relevant financial solutions for clients by using our deep industry knowledge, substantial experience and extensive networks. We can identify sources of finance suitable for your needs.

**Most importantly, we act for you, not your financier.**

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## HOW CAN QUADRANT ADVISORY ADD VALUE TO YOUR BUSINESS?

Quadrant Advisory can assist you with:

- The renewal or restructure of your finance facilities by presenting information to financiers in the format and style required by them.
- Reviewing your financing terms & conditions, covenants and security arrangements e.g. personal guarantees, reporting, covenants, margins, fees and other finance costs.
- New and increased funding for acquisitions, working capital or development.
- Resolving confusion over the status of your bank relationship.
- Working on and communicating your business succession plan to your bank.
- Dealing with your financier if your business is not meeting financial targets and/or other covenants.
- Improving your risk management and governance structures and processes e.g. Risk Appetite Statement, advisory board.

## OUR BUSINESS NETWORK

Combined with Lavan’s extensive industry experience and network, Quadrant Advisory has the full capability and resources to provide the best possible advice to our clients.

Recent client engagements that Quadrant Advisory has successfully assisted with include:

| Sector                       | Key Outcomes  |
|------------------------------|---|
| Finance Company              | Assisted with the creation and preparation of a credit risk management framework for a business finance company.                          |
| Industrial Products          | Arranged banking facilities for the current senior management team to affect a management buy out of their company.                       |
| Commercial Property Investor | Conducted an independent and rigorous tender proposal via 8 banks to source the best credit terms and conditions on a non-recourse basis. |
| Agricultural Company         | Assisted the company with an urgent funding application for additional working capital facilities caused by over-stocking issues.         |
| Agricultural Producer        | Negotiated a restructuring of debt repayments to its two financiers along with additional funding from shareholders.                      |



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