LEGACY SOLUTIONS

SERVICE BROCHURE · NOVEMBER 2026

FINANCIAL MODELLING AND ASSESSMENT

Know the numbers work before you commit.

A lender-grade Investment Summary for a property or project: cash flow, projections and returns you can take to a bank.

Every legacy starts with a plan. Don't just make money, build wealth that outlives you.

Book your free 45-minute consultation or call 345-925-9810

WHERE YOU ARE TODAY

A good investment, or just a good feeling?

WHERE WE TAKE YOU

Picture making your offer knowing exactly how the property performs and what the bank will look for.

US$157M+	**Since 2018**	**3-year**	**Free**
financing secured for clients	helping Cayman buyers, realtors and developers	projections in every model	45-minute first consultation

YOUR CONSULTANT

Lori Moncrieffe

Founder & Consultant, Legacy Solutions
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THE CHALLENGE

A good investment, or just a good feeling?

01 Cash flow, returns and costs are rough estimates.

02 You don’t know what a bank will accept or how much it will lend against the property.

03 Buyers and investors ask for numbers you can’t show them yet.

“A big decision deserves real numbers, not guesswork.”



YOUR GUIDE

Analysis built the way a lender reviews a deal

Lori Moncrieffe, MSc, CAMS · Founder & Consultant

Lori spent over 15 years in commercial banking, credit adjudication and corporate finance, assessing deals from the bank’s side. Every Investment Summary is built the way a lender reads it and ends with a clear recommendation. We are issuer-neutral: we earn no commission from any bank, developer or broker.

- US$450M+ structured across her career
- Wharton Real Estate Investing & Analysis
- John Maxwell Certified Coach and Speaker
- DISC Behavior Consultant

WHY CLIENTS CHOOSE LEGACY SOLUTIONS

Lender-grade
Every model is built the way a lender reads a deal.

Stress-tested
Best, base and worst case on every model.

Issuer-neutral
No commission from any bank, developer or broker.

Fees agreed up front
Confirmed in a written proposal before work begins.

WHAT’S AT STAKE

A property that looks good on paper can tie up your deposit and cash flow for years if the numbers don’t work.

WHAT SUCCESS LOOKS LIKE

Picture making your offer knowing exactly how the property performs and what the bank will look for.

THE PLAN

Three steps to clear numbers

01

Free consultation

A 45-minute call on the property or project and what you need to know.

02

We build the model

Cash flow, 3-year projections, sensitivity tests, IRR and ROI.

03

Decide with confidence

An executive summary and recommendation you can act on or take to a lender.

YOUR ROADMAP

How an assessment works: who does what, and when the fees apply

01	**Free consultation** A 45-minute call on the property or project and your goals.	**Client and Legacy** No fee
02	**Engagement** We confirm the property, the scope and the fee in writing.	**Client signs** From CI$500 a property
03	**Intake** Financials, valuations and assumptions for the property.	**Client provides**
04	**Model build** A lender-grade cash flow model with 3-year projections.	**Legacy delivers**
05	**Scenarios** Sensitivity and stress tests, with best, base and worst cases.	**Legacy delivers**
06	**Report** An executive summary with cash flow, IRR and ROI.	**Legacy delivers**
07	**Recommendation** Clear recommendations and next steps.	**Client and Legacy**
08	**Financing, if you go ahead** We can take the numbers to the banks through our financing service.	**Next step**

YOUR INVESTMENT

Clear fees, agreed in writing

Published fees in Cayman Islands dollars, confirmed in writing before any work begins.

Property value up to CI$999,999: single / combined	CI$500 / CI$750
Property value CI$1M to CI$4.99M: single / combined	CI$1,000 / CI$1,500
Property value CI$5M+: single / combined	CI$1,750 / CI$2,250
Project Financing Assessment / Investment Prospectus Deck	0.50% of transaction
Agent Partner Package (realtors): up to 4 listing reports a month	CI$550 / month
Agent Partner Portfolio: 5 or more listing reports a month	Priced on request

Single covers a personal or a company review; combined covers both. Agent Partner fees are paid monthly in advance. Fees are indicative and confirmed in a written proposal.

WHAT WE WILL NEED FROM YOU

ABOUT THE PROPERTY

- Purchase agreement or listing details
- Valuation, if available
- Expected rental income or sales proceeds

ABOUT THE BUYER

- Buying personally, through a company, or both
- The deposit and how it will be funded
- Personal Financial Statement or company financials

YOUR NEXT STEP

Book your free 45-minute consultation

We talk through the property or project and what you need to know, and confirm the scope and fee in writing.

Book a consultation

45 minutes · no cost · no obligation

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Investment Summaries are analysis, not a guarantee of returns or an offer of finance. Legacy Solutions is issuer-neutral and earns no commission from any bank, developer or broker. Fees are in Cayman Islands dollars and confirmed in a written proposal.