Please complete this form if you wish to be listed on PFX as a Regional Manager (RM). This means that you will be able to list opportunities on PFX and widen your reach into the investor market. You will need to be able to list at least two new fully submission-ready opportunities per quarter, over and above enquiries that will come to you through PFX marketing.

If you are unable to meet our volume or experience requirements but have the occasional PF deal, please see ‘**PROFESSIONAL ADVISORS’** below.

|  |  |  |
| --- | --- | --- |
| 1 | First Name |  |
| 2 | Second Name |  |
| 3 | Position |  |
| 4 | Company |  |
| 5 | Address 1 |  |
| 6 | Address 2 |  |
| 7 | Town/City |  |
| 8 | Country |  |
| 9 | Phone (with country code) |  |
| 10 | Whatsapp |  |
| 11 | Company e-mail (not gmail etc) |  |
| 12 | Company website (required) |  |
| 13 | LinkedIn profile (optional) |  |
| 14 | Years PF experience |  |
| 15 | For professional advisors **other than** project finance advisors. What is the nature of your profession (accountancy, lawyers, corp finance consultant etc)? |  |

Please summarise **submission-ready opportunities** you are ready to list as follows. These must have EPC, off-take/PPA signed or ready to sign as should be the case for any specialist providers to the project (turbines, medical etc). Only complete this section if you have reviewed the [PFX Intake Form](https://www.projectfinanceexchange.com/api/PublicDownloads/PFX%20Intake%20Form.docx) and you can tick all the boxes shown for the various requirements. Our minimum deal value is $50m with no upper limit, but the ‘sweet spot’ for investors is currently $250m to $1bn+.

**Submission Ready Opportunities**

|  |  |  |  |
| --- | --- | --- | --- |
| $Value | Market Sector (infra, Renewables, Hospitality etc) | Location Country/State | Location of project ownership Country/State (if different to previous column) |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  | Add lines as needed |

Please list opportunities **currently in your pipeline** that still need work to bring them up to PFX Submission Ready standard.

**Pipeline**

|  |  |  |  |
| --- | --- | --- | --- |
| $Value | Market Sector (infra, Renewables, Hospitality etc) | Location Country/State | Location of project ownership Country/State |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  | Add lines as needed |

When completed please return this form to **comms.central@projectfinanceexchange.com.**

**PROFESSIONAL ADVISORS**

If you are a **consultant, accountant, lawyer or other professional** with clients who occasionally need project finance raising support, our Direct Intake Service (DIS) is designed for you. It is conditional that you introduce us directly to your client with no other intermediary involved.

* Complete and return this form inserting N/A into lines 12 to 14 above (but complete 15) and completing the first line of the **submission-ready opportunities** panel**.** This is all we need to make a judgement call on the project.
* We will send you our Intake Form for you to pass onto your client.
* On review of the Intake Form we will advise if we accept or decline the opportunity.
* If accepted we will provide you with an introducer/fee agreement. Once signed, we will connect directly with your client.
* When you have further opportunities, just e-mail us with a completed Intake Form from your client, and the above process is then repeated.
* We manage the introduction to the selected investor and support your client through the transaction.
* You receive an agreed proportion of the fee paid to us by the investor depending on the amount of work required in bringing the opportunity up to our ‘submission ready’ standards prior to listing.

To move forward please complete and return this form to **DIS@projectfinanceexchange.com** with ‘**Professional Advisor’** in the subject line. We will revert to you within three working days.

Thank you.

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