



A S C E N D
C O R P *Strata*



PROPOSAL FOR PROFESSIONAL MANAGEMENT

SP67851 – 200 WILLIAM STREET WOOLLOOMOOLOO NSW

14 NOVEMBER 2022





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COVER LETTER

14 November 2022

Matthew Perkins
200 William Street
Woolloomooloo NSW 2011

Via Email: matt@perkins.id.au

Dear Matt,

We would like to take this opportunity to thank you for the prospect to tender for your building located at 200 William Street Woolloomooloo. We are of the understanding that this building consists of 38 residential apartments as well as 26 car spaces.

With well over 30 years of combined Strata Management experience and recently being awarded Number 1 Boutique Strata Agency in NSW, the Team at AscendCorp Strata is strategically placed to offer unique high-end quality service to Owners Corporations in establishing and managing Strata Schemes.

Our goal at AscendCorp Strata is to forge long term partnerships with our Owners Corporations. We believe that the successful operation of a Strata Scheme is built and maintained over time via a consistent application of quality preparation, advice and decision making. This process cannot be achieved without the understanding that not only are all Strata Schemes unique, the Owner's Corporations within them also have their own specific wants and needs, as well as a vision for the future.

At AscendCorp Strata, our mission is to ascertain what the Owners Corporation desires to achieve with the assistance of their Strata Manager. An Owners Corporation has the potential to create their own standard and character for their building, and with continuity and intelligent action establish a stable and economical plan for its ongoing management.

In managing your Strata Scheme, we envisage an active and inclusive Owners group complemented by a Management team that supports, offers advice, and carries the administrative load. Our goal is to maintain the enjoyment of managing your scheme for all parties involved, whilst reducing the burden of work involved for our strata committees.

We pride ourselves on maintaining impeccable service as the standard. With industry leading turnaround times, astute advice and an unparalleled depth of experience, AscendCorp Strata delivers the pinnacle in Strata Scheme Management.

We look forward to guiding you into the next phase of your Strata Scheme's evolution. If there are any questions, please feel free to contact me.

Kind Regards,

Ryan Walmsley
Managing Director
AscendCorp Strata Pty Ltd





COMPANY AND OPERATING HISTORY

AscendCorp Strata was formed in early 2018, post the sale of Meriton Strata Management late in 2017. The company is owned and operated by Ryan and Sarah Walmsley, who are both Managing Directors.



Ryan Walmsley – Managing Director

Ryan's career is highlighted by an extended tenure with one of Australia's largest Developers. Reporting as Operations Manager and setting up management divisions providing both Facilities Management and Strata Management services, Ryan has developed a deep insight into the development process and post completion management. Ryan founded and operated Meriton Strata Management for over 8 years until it's eventual sale due to legislative changes. In doing so, he developed a keen understanding of the benefits of fostering a professional working relationship between the Strata Manager, Developer and Owners Corporation in ensuring all requirements are fulfilled and managed at the various stages of the development cycle. As the development process overlaps from one stage to the next, it is imperative that the transitions are managed effectively, and communication remains at the forefront to ensure all stakeholders are satisfied with the end result.



Sarah Walmsley – Managing Director & Licensee in Charge

Sarah Walmsley is herself one of the most experienced Strata Managers in the industry. Having achieved the highest accreditation possible through SCA (Strata Community Australia), Sarah is officially accredited as a Practicing Strata Community Manager (PSCM). Having spent time at several of the major Strata Management firms, she expanded her skillset within the unique culture of the Meriton Group, harnessing the rare experience of running a Strata Management firm whilst having firsthand exposure to the needs and requirements of Australia's largest residential Developer. Sarah's experience does not end there, she is also highly qualified having her License in Strata Management, Real Estate as well as having Degrees in both Events Management and Business, Sarah is the backbone of the AscendCorp Delivery Promise.

Post the sale of Meriton Strata Management due to changes in legislation, Sarah and Ryan teamed up once again to form AscendCorp Strata Management. This time enabling them to form their own culture, combining high level Strata Management experience with the rare insight into the innerworkings of a Tier 1 Developer.

Ryan and Sarah are both determined to bring back high-level customer service standard to the strata management experience, ensuring that client satisfaction always remains the focal point of their business.



YOUR INVESTMENT

Description	Cost per annum ex GST (38 lots)	
Term	Per Lot	Per Annum
Management Fee	\$220	\$8,360
Fixed Disbursements	\$80	\$3,040
Total	\$300	\$11,400

We at AscendCorp Strata are very appreciative of the opportunity to discuss providing our unique Strata Management services.

We believe our services and advice will not only garner immediate improvements to the management of your scheme, but also provide diligent and caring ongoing management and planning into the future.

We understand the importance of minimising the Strata Scheme's unbudgeted costs, and as such we are pleased to undertake our services as outlined in our scope of works using our predominantly fixed pricing structure.

Please refer to our bespoke Agency Agreement for a comprehensive list of our pricing structure and to understand what is included in our fixed disbursement fee.



Tulipwood – Proudly managed By AscendCorp



Natura – Proudly managed By AscendCorp



MANAGEMENT SERVICES

At AscendCorp Strata, we focus on keeping our fee structure as simple and as transparent as possible:

- › We charge an Annual Strata Management fee, calculated per lot.
- › We charge an Annual Fixed Disbursement fee, calculated per lot.
- › We keep all other additional further service fees as low as possible as they are only as required.

What is included in the Strata Management Fee:

- › Maintain strata roll/minute book/common seal and routine correspondence
- › Receiving, processing, and paying invoices related to the scheme
- › Arrange work order and quotations for standard and non-standard repairs
- › Arranging for appropriate qualified contractors and consultants to inspect and maintain statutory compliance
- › Arranging Fire Safety Statement and inspections required in order to ensure compliance
- › Arrange Insurance Valuation as required
- › Arranging Insurance Quotations and claims
- › Prepare Capital Works fund and Administrative fund budgets
- › Arranging the 10-year capital works fund plan by an appropriate consultant
- › Establish levy payment facility
- › Arranging and undertaking administrative duties in relation to annual general meetings, limited to 2 hours during our normal office hours

What is included in the Fixed Disbursement Fee:

- › Establish and maintain investment accounts
- › Scanning of Documents if sent by email, posted on line or prior to handover or destruction of physical records
- › Expenses incurred maintaining records of the scheme, including costs of storing records with the storage facility
- › Checking accreditation, licenses and insurances for all engaged contractors
- › Issuing levy notices
- › Issue security keys/passes and maintain register
- › Re-issue lost/stolen key/pass
- › Ingoing and outgoing telephone calls on behalf of the owners' corporation or strata committee
- › Printing in both black and white and colour on behalf of the owner's corporation or strata committee
- › Monthly reporting to the committee including updates on all current and outstanding matters

Unlike other Strata Agencies who charge 'Disbursements' for every piece of paper printed, for every time a phone call is made, and every time a levy notice is sent out, we do not.

We charge a simple reduced fee, calculated per lot per annum to keep your Strata Schemes costs down and to allow for more effective budgeting and forward planning.

Please refer to the Agency Agreement for a full scope of works.



PREVIOUS PROJECT EXPERIENCE

Ryan and Sarah have both been involved in the planning, preparation, handover and ongoing management of the below large-scale developments such as;



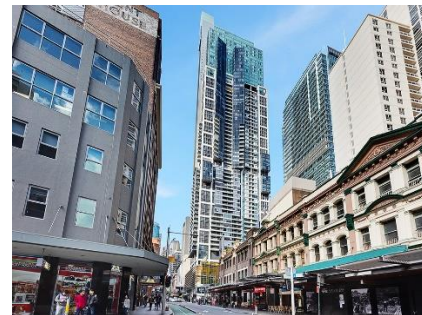
MASCOT CENTRAL
942 Lots / 4 Strata Schemes
Retail Precinct & BMC



MERITON MOORE PARK PRECINCT
Over 2000 Lots / 9 Strata Schemes
Retail Precinct, Shared Facilities under BMC



EPPING PARK
764 Lots / 3 Strata Schemes
Community and Neighbourhood Association



WORLD TOWER
715 Lots / 4 Strata Schemes including
Commercial & Retail with BMC, member of
World Square BMC



INFINITY
549 Lots / 81 Storey tower in Brisbane
4 Strata Schemes,
BMC and Hotel



SOLEIL
464 Lots / 74 Storey tower in Brisbane
3 Strata Schemes
Hotel, BMC, Shopping precinct



PROFESSIONAL STANDARDS SCHEME

AscendCorp Strata are proud members of SCA (NSW), the peak body for the strata sector in NSW representing 2,000 strata managers.

The NSW Government under the Minister for Better Regulation and Innovation, Kevin Anderson, has approved a Professional Standards Scheme. This formal recognition by the NSW Government is first of its kind for the property services sector in Australia and an exciting time as members of the SCA NSW.

The scheme has been approved for an initial period of 5 years commencing from 1st July 2021. This approval means our business, AscendCorp Strata, must adhere to a Code of Ethics including professional standards, and is monitored by Professional Standards Australia.

What does this mean for you?

At the forefront of this scheme is a further commitment to consumers to ensure high professional standards across the strata industry in NSW. This is in line with various other initiatives across NSW, including the NSW Government plan to rebuild the construction sector and restore confidence and professionalism.

The Professional Standards Scheme will bring to our clients a range of benefits, including:

- The SCA (NSW) will oversee and self-regulate the conduct of all members within a structured professional framework.
- In addition to our internal complaints handling process, the Professional Standards Scheme brings a further robust and independent complaints handling process, ensuring clients can be assured of an independent review and response.
- An increase in Continual Professional Development (CPD) requirements for Strata Managers and Licensee's in Charge, ensuring the industry remains up to date, educated and aware of their on-going responsibilities to the consumer.

At AscendCorp Strata we are committed to supporting the strata industry, contributing to the overall improvement, and providing an excellent customer experience. The introduction of the Professional Standards Scheme will assist us in meeting these goals for our clients.

If you have any questions regarding the Professional Standards Scheme, please contact Sarah Walmsley or SCA (NSW) on 02 9492 8200. Alternatively, further details are available at www.psc.gov.au.

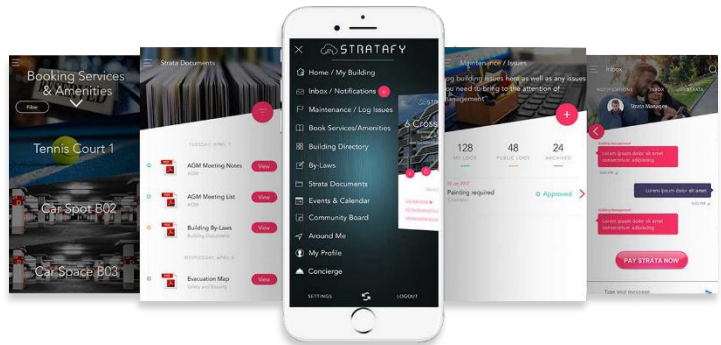




QUALITY CONTROL AND RESIDENT MANAGEMENT

At AscendCorp Strata, we have chosen to employ arguably the most advanced, user friendly Strata and Building Management software on the market, Stratafy.

Having developed a close relationship with the founders of Stratafy, we have had a hand in assisting to tailor the software during its evolution to what we now believe to be the ideal solution for small to large scale mixed-use developments.



Stratafy, being a cloud-based software, enables us to access the entire suite of management options at any time of the day or night, at any location, requiring only an internet connection.

Each occupant is encouraged to download the Stratafy App (iOS & Android), using the instructions provided in their welcome packs. From this App, residents are able to perform almost any Strata or Building Management function including but not limited to the following:

- › Paying strata levies
- › Logging a maintenance request including photos taken in real time
- › Accessing all relevant scheme documentation i.e. COC, Strata Plan, Cert of title, financial reports, all agendas and minutes, building schematics, all at the press of a button
- › Chat with fellow residents via the chat function
- › Liaise with committee members
- › Approve or decline jobs or invoices
- › Create asset registers
- › View maintenance schedules
- › View building notices
- › View advertisements and offers from retail stores within the scheme

This is merely a snapshot of the capability of Stratafy, should you wish to review the software in action we would gladly arrange a meeting directly with the Software developers for a personal presentation of its capabilities.



Maison Deux – Proudly managed By AscendCorp



Lehan Gardens – Proudly managed By AscendCorp



WHY CHOOSE ASCENDCORP STRATA?

- › **Family owned and operated business** focussing on high-end level of service with proactive management and communication.
- › **Highly Experienced and engaged strata managers** and support staff who are recognised as leaders in the industry
- › **Simplifying Strata Legislative requirements** so your home and/or investment is a positive experience.
- › **Opportunity for cost savings on Insurance, Utilities** and review of all contracts.
- › **Cutting edge Software** that allows Owners and Tenants to access all documentation through an App installed on their smart phone.
- › **Monthly reporting** giving committee members transparency and updates on all current and outstanding matters.
- › **Industry leading response times** using the latest Technology to create simple and effective communication.
- › **In depth Developer experience** with the largest Developers in Australia.
- › **Vast network of quality Contractors** ready to respond 24/7.
- › **High level Strata Accounting** and reporting using the latest Technology.
- › **All Strata Meetings** held within office hours will incur no additional charge.
- › **AscendCorp Strata complies** with the Professional Standards Scheme
- › **Ability to request work orders and quote requests directly to your Strata Manager**, through an App installed on your phone.
- › **Strata Meetings run more efficiently** with electronic voting through all Attendees' smartphones.
- › **Transparent and realistic annual fees** with fixed disbursement cost structure
- › **We are a fun dynamic team** who like to work in the 21st century with Technology, which means we work faster therefor less of your time is wasted!



Spectra – Proudly managed by AscendCorp



HANDOVER PROCESS

Engaging the services of a new Strata Manager can be a daunting and complicated process and is the reason many strata schemes do not change even when the level of service they are receiving is less than acceptable. We believe you deserve better and are here on hand and ready to guide you through the process and ensure that the transition is a smooth and uncomplicated one. We can facilitate the process by providing motions to terminate your existing manager as well as assisting step by step until all of the books and records are integrated into our system and every single owner and agent within your scheme is warmly welcomed to the AscendCorp Strata Team

NEXT STEPS

- › Contact our office via phone or email to discuss this proposal further or go through any questions you may have. This is an obligation-free discussion and information contained is always kept private and confidential.
- › We invite you to meet with us in person. Again, this is obligation-free and completely confidential. This allows for you to be comfortable with our managerial services and further discuss any questions or concerns you may have.
- › If you then wish to proceed, we will guide you through all of the necessary paperwork required and assist with facilitating the handover.

REFERENCES

Available upon request.



Battique – Proudly managed By AscendCorp



The Greens – Proudly managed by AscendCorp



CONTACT US

Ryan Walmsley

Managing Director at AscendCorp Strata

Mobile: 0405 323 381

Phone: 02 9799 1111

Address: 609/100 Walker Street NORTH SYDNEY NSW 2060

Postal: PO Box 419 NORTH SYDNEY NSW 2059

Email: ryan@ascendcorpstrata.com.au

Web: www.ascendcorp.com.au

Located just off Miller Street, our Walker Street location is in the heart of Sydney's second-largest CBD. Our ideal corporate office space is connected to the entire city via North Sydney Station and is situated just a short walk from Greenwood Plaza, buses, and ferries. We have various meeting rooms and zoom rooms available to our clients at any time as well as ample off-street parking available in one of the many parking stations located on Walker Street.



Our new office space – Located in the heart of North Sydney CBD



Meeting Rooms – Available to our clients, also includes zoom facilities

HEAR WHAT OUR CLIENTS HAVE TO SAY

"Thanks for your advice and a very well managed meeting last night. Having you and Ryan on board is like a breath of fresh air. We are all really looking forward to working with you." – **Treasurer, Lane Cove**

"Thanks for all your help getting us sorted, the committee commented today on how much of a relief it is so be moving forward and we appreciate yours and Ryan's assistance greatly!" – **Chairperson, Huntleys Cove**

"On behalf of the committee we really appreciated your time today at our meeting, it was great meeting you & being able to communicate face to face with everyone present." – **Committee Member, Kogarah**