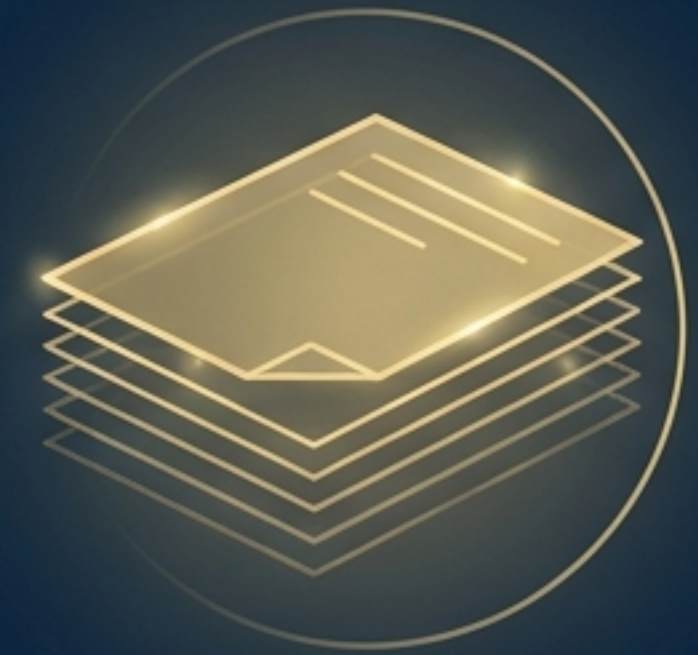


# Time Spent Searching Is Not Time Spent Advising

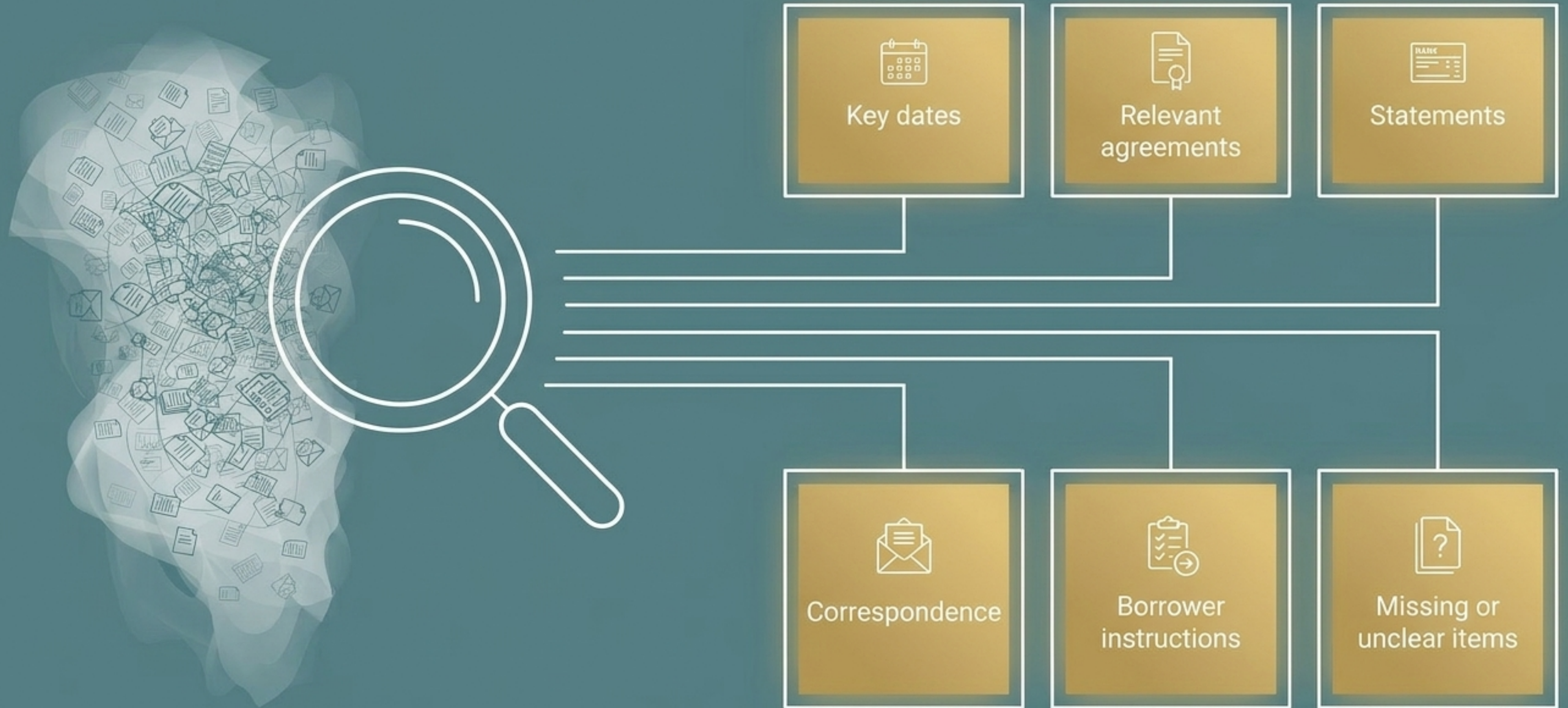


# The Challenge of Large Borrower Files

A large borrower document pack may contain statements, letters, agreements, account notes, emails, forms, and correspondence.



# Essential Facts to Locate



# The Sorting Phase

If the file is disorganised, time is spent sorting, cross-checking, and trying to understand the basic layout before proper review can begin.



Sorting & Cross-Checking

Proper  
Review

# Searching is Not Advising

Time spent searching is necessary, but it is not the same as professional review, advice, or preparing the next practical step.



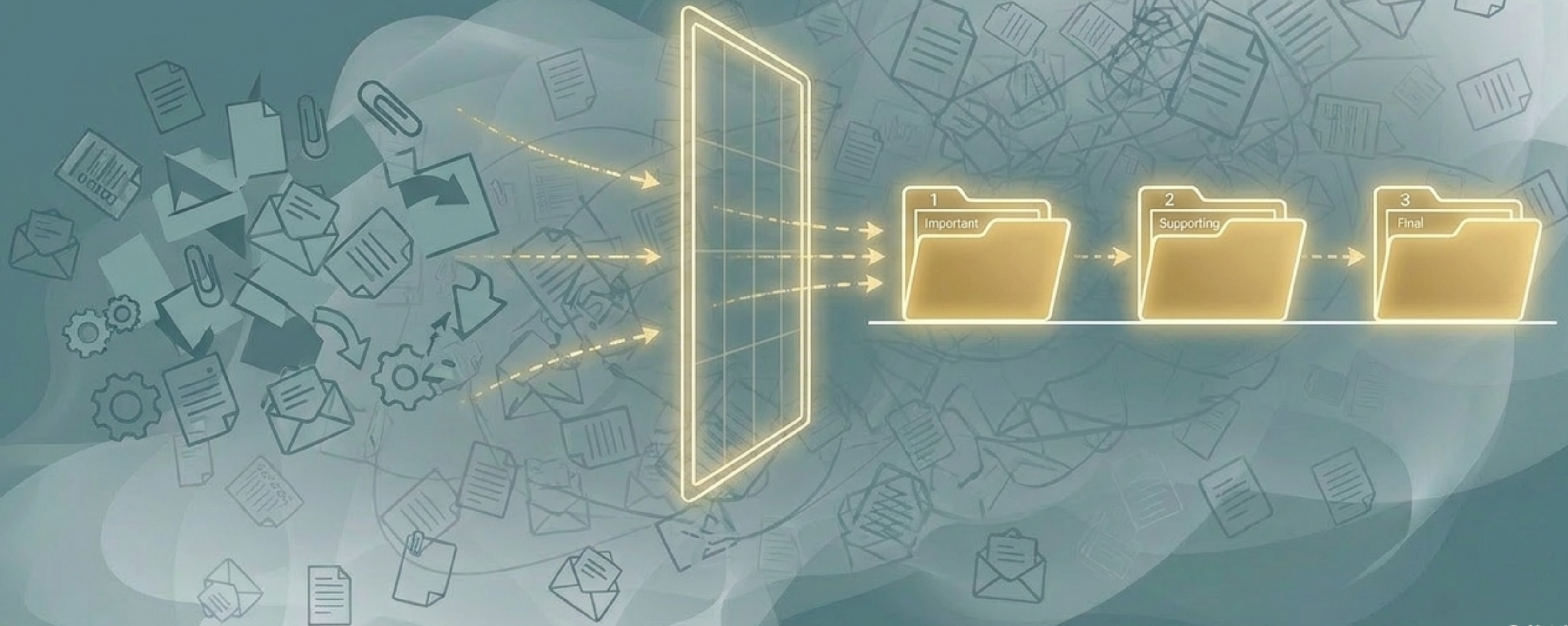
Sorting  
Layout  
Cross-checking



Professional review  
Actionable advice  
Next practical steps

# Where Document Pack Review Helps

Document Pack Review helps group related material, identify important pages, and create a clearer route through the file.



# Surfacing Key Components

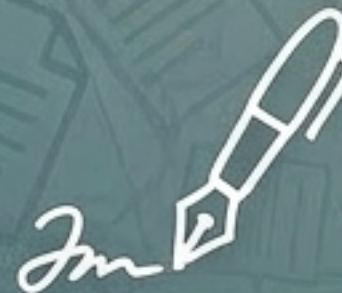
Dates, names, agreements, statements, correspondence, missing or unclear items, and documents that may need closer review.



Dates



Names



Agreements



Statements &  
Correspondence



Missing or  
unclear items



Documents that may  
need closer review

# A Clearer Starting Point

Document Pack Review prepares a clearer review pack for Gerry Owens or the appropriate professional to review.



# Professional Boundaries

## What it does not do



Does not provide legal, financial, regulatory, insolvency, or tax advice.



Does not decide whether rules were breached.



Does not confirm lender fault, decide claims, or guarantee outcomes.



Does not replace qualified professionals.

# Order Before Review

When a document pack is large, mixed, or difficult to follow, the first useful step is to bring it into order so the professional can spend more time reviewing what matters.

