

BASELINE FINANCE

Helping a growing mining services business secure its long-term operational base.

Operational certainty | Multi-party acquisition | SMSF and unit trust structure



<p>CLIENT SNAPSHOT</p> <p>INDUSTRY Mining services</p> <p>LOCATION Welshpool, WA</p> <p>SIZE / TENURE 40+ staff 5 years</p> <p>OBJECTIVE Secure long-term premises</p>	<p>BACKGROUND</p> <p>A growing WA mining services business sought assistance with acquiring a commercial property to secure its long-term operating base.</p>	<p>MANDATE</p> <p>Coordinate a multi-party purchase structure while protecting operational certainty before the existing lease expired.</p>
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THE CHALLENGE

The transaction required far more than arranging finance. It required careful coordination between all parties to achieve a commercially workable outcome.

- Multiple purchasing parties involved
- SMSFs incorporated within a unit trust structure
- Significant coordination required across advisers
- Ownership and lending structures needed to align
- Outcomes needed to balance multiple stakeholders
- Competitive industrial property market
- Long-term operational stability was critical

WHAT WE UNCOVERED

Baseline identified that lender selection would be shaped by the ownership structure. The SMSF and unit trust arrangements narrowed the field, and momentum depended on clear coordination between advisers and stakeholders.

<p>1</p> <p>Structure</p> <p>Not all lenders could accommodate the proposed SMSF and unit trust arrangements.</p>	<p>2</p> <p>Coordination</p> <p>Accountants, advisers and stakeholders needed to stay aligned throughout the process.</p>	<p>3</p> <p>Certainty</p> <p>The commercial priority was operational continuity before the existing lease expired.</p>
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THE SOLUTION

- Coordinated directly with accountants and advisers
- Gathered and organised required financial information
- Reviewed viable ownership and lending structures
- Ran a competitive tender across suitable lenders
- Negotiated terms aligned with stakeholder objectives
- Managed communication and process flow end to end

<p>Premises Secured</p> <p>LONG-TERM OPERATING BASE LOCKED IN</p>	<p>Terms Negotiated</p> <p>STRONG COMMERCIAL LENDING OUTCOME</p>	<p>Structure Approved</p> <p>SMSF AND UNIT TRUST ACCOMMODATED</p>	<p>Certainty Achieved</p> <p>OPERATIONAL STABILITY PROTECTED</p>
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FINAL THOUGHT

Commercial property transactions can involve far more than funding. Baseline Finance works with business owners and advisers to structure solutions that support long-term operational objectives.