

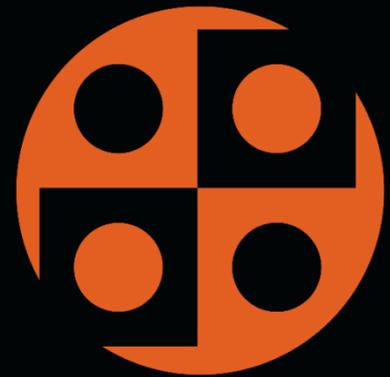


# Welcome to M. Allen

Veteran Owned Business that Specializes in Revenue, Profit & Business Development Services for Financial Services.

By: Founder & CEO, Matthew Allen Slonaker

Growth in Action Overview  
[www.mattallendevelopment.com](http://www.mattallendevelopment.com)



*M. Allen*  
Growth in action



# Today's agenda

Executive Summary  
Our Brand Promise  
Trends in Financial Services  
Pain & Problem We Are Solving  
Solution and Services  
Qualifications  
Our Leadership  
How We're Different  
Investment Discussion  
Timeline Discussion  
Questions and Next Steps

***“This is the greatest financial crisis since the Great Depression. Yet, it presents opportunities. Executives with vision and BOLDNESS can ensure their companies emerge stronger than ever”***



# Executive summary

## How and Why Did We Start M. Allen?

I founded M. Allen in early May 2020. Like many of the 40+ million U.S. citizens who became unemployed during the Covid health/economic crisis, I quickly pivoted and realized I could share my expertise in generating growth. This provided the trigger to launch. Within three short weeks, I commenced serving our initial client base (including my last employer) of three accounts.

Our mission is to help the 55% of B2B companies that miss their annual growth targets. We will do this by deploying our diverse executive experience in business operations, information technology and sales to lead engagements of all sizes and situations, with particular focus in the financial services sector.

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# Our M. Allen Brand

*What We Strive For Daily*

Transparency

Commitment to serve & deliver

Bring logical and sound decision making  
capabilities

Passion to what we do every day and with every  
client engagement

Affordable yet high value services and solutions

Integrity – do what we say

Growth – with our clients, partners & ourselves



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# Trends in Financial Services

- AI/Artificial Intelligence driving the way companies provide everything from customer service to investment advice
- Traditional financial institutions facing competition from non-traditional market players with skills, funding and innovation
- Prolonged low interest rate environment, many now look at cost containment as one of the keys to survival
- Security – everything depends on robust cybersecurity to hold off threats that are coming from multiple directions
- Risk Management – grapple with culture, ethics, and trust, it often finds itself playing defense
- Digital Lending and Labor – robotic process automation
- Non-performing Loan and Default Management – expecting a substantial increase due to high unemployment rates
- Core initiatives – seeking experienced talent with solutions that can accelerate go-to-market and create differentiation (customer experience and journeys)



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# Problem & Pain 08

1. **Growth Needs** – You are not meeting growth targets and goals. We can help.
2. **Reduce Internal Operating Costs** – From planning to deploying outsource solutions. We can help.
3. **Deploying Digital & Intelligent Tech** – Your internal IT team is lean, focused on other priorities or does not have the required expertise in-house. We can help.
4. **Improving Loan Performance** – You require help with default loan management & non-performing portfolio challenges. We can help.
5. **Your Operations Require Scale** – Lending through loan servicing operational needs for scaling or handling more loans. We can help.



# Solutions & Services

## M. Allen Direct

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### Sales & Marketing Strategy & Consulting



Go-to-Market  
Account Segmentation  
Sales Effectiveness  
Sales Enablement  
Account-based  
Marketing & More

### Contract National Business Development



Revenue Growth  
without Full Labor  
Sales Expense

### Program & Project Management



Operational Projects  
IT Projects  
Revenue Growth  
Projects  
Customer Experience  
& Success Projects



# Solutions & Services

## M. Allen In-Direct

### Technology Enablement



- Robotic Process Automation
- Mobile Apps
- Business & Predictive Intelligence
- App Development

### Servicing & Fulfillment Solutions



- National Bankruptcy & Foreclosure Services
- Loan Origination
- Production Fulfillment

### Property Preservation & Inspection Services



- Disaster Preservation and Rehab
- FHA Conveyance Solutions
- Field Services & Inspections

# 200%

INCREASE  
IN SALES WITHIN 3  
YEARS

# \$400M+

Annual Revenue Managed





## Massive Growth

Responsible for completing a total of 207+ deals during employ with a mortgage solution provider. Deals generated \$32M+ for the company, a third of its annual revenue.



## Revenue Up. Costs Down.

Enterprise national title sales and lead the improvement of increasing monthly sales by over 48% while decreasing the cost of sales by 27%



## Account Success

Developed growth strategy & have increased the sales coverage across 200 accounts by 3x while lowering the sales expense by over 25%.

Increased revenue per account by 5% within 6 months.

# Our Track Record

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Overview | M. Allen LLC

**Over the last five years, we've managed over \$400 Million in annual revenue**

**Lead 2x growth initiatives**

**Closed on over 250 deals**

"I've only had the opportunity to work with Matt for a brief period but during that time I was able to learn more about Enterprise Sales, Differentiated Selling and Innovative Marketing."

Linda Vo, VP  
WFG

"Matt is self-driven to deliver perfection. He blends technology, data, and business knowledge to deliver a comprehensive product. The amount of prep work and effort he puts in will far exceed expectations."

Tu Le, SVP  
Suntrust Bank

"I've worked with Matt in many different capacities over the years. He has the passion to drive a leadership team that is able to focus simultaneously on the people, the product and the process."

Doris Raimundi, SVP  
U.S. Bank



# Our Leadership

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## Matt Slonaker

Founder & CEO

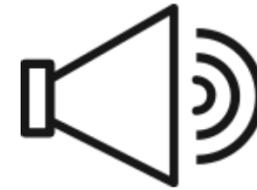
Growth-centric financial services leader with over 20 years of executive level success. Offers unmatched tactical planning skills in a diverse variety of environments, which include: start-ups, turnarounds, and well-established businesses. Experience leading IT, Business Ops & Sales/Marketing teams.



# HOW WE'RE DIFFERENT



More than strategy. Executes the strategy.



More than a generalist and diversity in ops, tech & revenue growth skills



Experience leading growth and executing programs within Fortune to private-owned enterprises



Advanced and agile techniques



Creative ideas with objective and data insights supporting

## CONSULTATION

Tailored to unique client situation - fixed monthly cost, retainer or variable per hour

## BUSINESS DEVELOPMENT

Tailored to unique client situation and services or solutions being sold - fixed monthly cost, retainer and commission schedules

## In-DIRECT M. Allen SERVICES

Tailored to the individual client services and ability to generate savings or package bundles



# Pricing

# Tailored action timeline



## PHASE 1 - Discovery

Run an executive briefing and discovery session or series of sessions – centered on specific pains

## PHASE 2 - Validation

Based on discovery, engage in a 2-4 week assessment or initial project engagement

## PHASE 3 – Engage Delivery

Finalize entry engagement road map, statement of work or project(s)

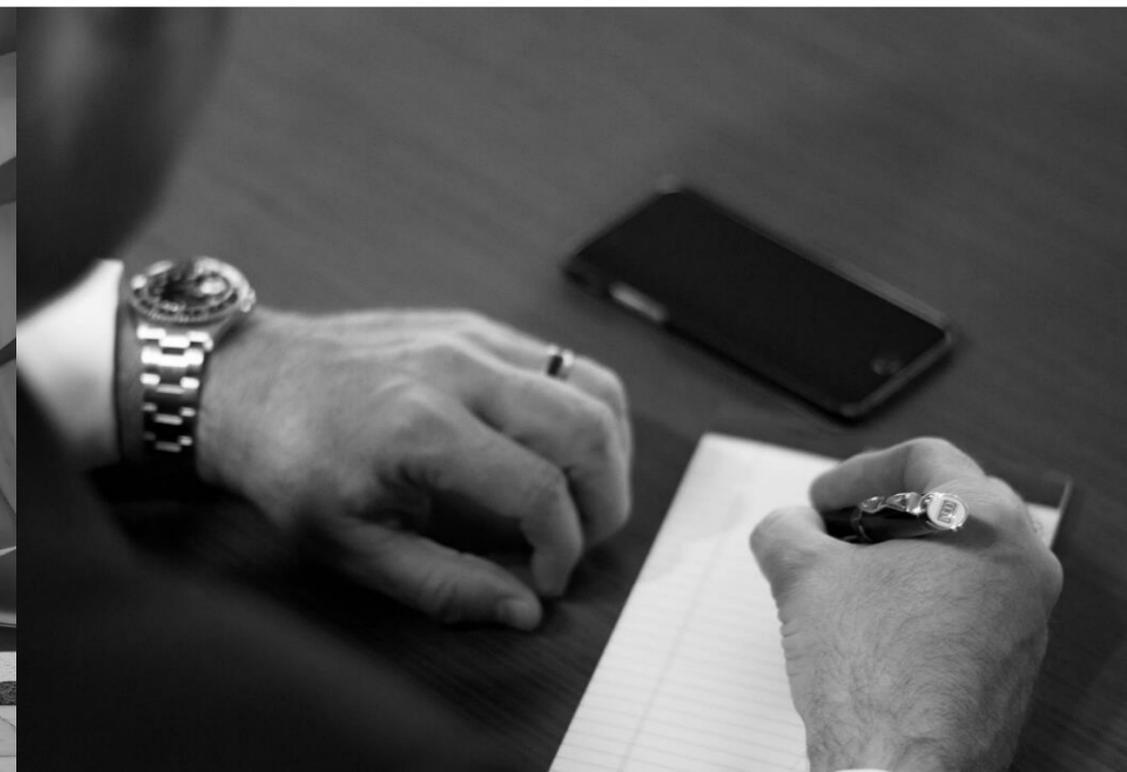
## Questions

Who else is involved in your buying process?

Where should we continue discussions?

What is your buying process?

Other risks or areas that we need to dig into?





# Contact us

M. Allen LLC – Growth in Action

## MAILING ADDRESS

17488 Olive Street, Broomfield, CO 80023

## EMAIL ADDRESS

[mstonaker@mattallendevelopment.com](mailto:mstonaker@mattallendevelopment.com)

## PHONE NUMBER

972.740.4300

## WEBSITE

[WWW.MATTALLENDEVELOPMENT.COM](http://WWW.MATTALLENDEVELOPMENT.COM)

A NIGHT OF POUR DECISIONS

**Your Invite**

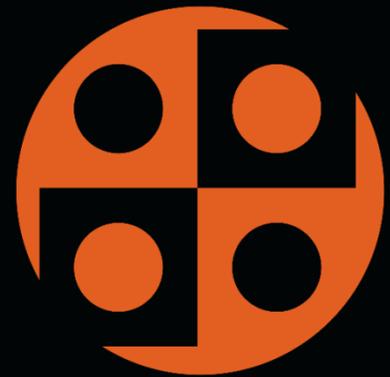
WINE TASTING

M . A L L E N L L C

H O S T I N G T H E I R

F I R S T V I R T U A L

T A S T I N G



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