



Capability statement

For levy recovery work on behalf of owners corporations

Introduction

It is with pleasure we submit this Capability Statement as a potential provider of levy recovery and legal services to your Owners Corporations. We appreciate the opportunity to introduce our firm, key people and some of our proprietary technology.

Confidential information

We ask that the contents of this document including our fees is kept confidential. It has been provided to enable you on a confidential basis to consider retaining our firm for legal advice.

About us

Bugden Allen is a national law firm that specialises in property development law and structured titles such as strata and community title, leasehold and stratum. Our team is driven by our mission to help strata managers, owners corporations and developers create truly **great** communities.

With over 50 staff including 8 partners, we service clients across Australia from our offices in Sydney, Brisbane, Melbourne, the Sunshine Coast and Perth. Our team of experts in property development and strata law, is led by some of the country's leading property lawyers.

Our **LevyCollect** team is led by Petra Lohmann, who has over 35 years' experience specialising in the recovery work for unpaid strata levies. Petra is supported by a team of 7 debt collection specialists. They provide levy recovery services for all states and territories across Australia and are supported by our local legal teams if a matter ever becomes contested.

Our approach

Our approach is to form successful partnerships with strata management firms and their owners corporation clients built on trust and confidence.

We do this by:

- Providing fixed-fee proposals whenever possible
- Always acting with integrity and the highest professional ethical standards
- Using our own proprietary technology to offer our clients cost savings, visibility and control over their legal matter
- Acting as an extension of your finance team. We take the lead in the collection of overdue strata levies professionally and diligently, but with kindness and compassion
- Focusing on results, not more legal problems

- Working with strata managers and developers from the design phase of projects to ensure the community functions efficiently and harmoniously
- Providing world-leading experts without the expensive price tag
- Giving back to the industry and our clients through education, thought leadership and genuine support

Our services

Our team of specialist strata lawyers and support staff give us the depth needed to economically undertake the full range of strata and community titles work including:

- Levy recovery
- By-law drafting and reviews
- By-law registrations
- Strata and community titles advisory work
- Management rights
- Scheme Restructuring
- Redevelopment or termination of strata schemes
- Commercial property
- Property Law reform
- Sustainability initiatives in property
- Property technology
- Commercial and property litigation

Our NSW LevyCollect Work

Our team take all steps necessary to facilitate the recovery of out unpaid levies, interest and charges, which may include:

- Letter of Demand
- Setting up and monitoring payment arrangements
- Commencing recovery proceedings via the Local Court of NSW
- Obtaining judgment;
- Enforcing judgments;
- Implementing Insolvency proceedings where instructed (bankruptcy or winding-up)

Our fees

Every matter is different, and our fees will vary for each Owners Corporation. Some indicative examples of our fees are outlined in our LevyCollect Costs and Disbursements price list which accompanies this capability statement.

Initially, our cost of issuing a letter of demand is \$150.00 (+ GST). Thereafter, if the arrears remain unpaid and further action is required, an accurate fee estimate will be provided.

Our technology

One of our company's core values is *"With Innovation, we grow"*.

To support this, we have developed a proprietary platform called "LevyCollect" that helps our team be more efficient and provide our clients with online access to some of our legal services.



LevyCollect is the name of our levy recovery service and our software platform, headed up by a national team that has over 35-years experience in this area.

The *LevyCollect* portal gives our clients real-time visibility over their levy recovery matters. Strata managers can even create a new matter and upload all the documents we need to start levy recovery action. We are also working with some of the leading strata management systems in the industry to integrate LevyCollect via an API. Our first integration with Urbanise Strata is almost complete – if you are an Urbanise client, you can simply turn on the integration from within the system.

We are in active discussions with a number of the other software vendors including PiQ, MRI, Stratafy, Stratasphere and StrataMax.

A screenshot of the system is shown below:



There is no cost for LevyCollect for our clients. We will set you up in the platform as soon as you engage us for your first levy recovery matter.

Our team

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More information

If you require any further information about Bugden Allen, our team, experience and technology, please visit our web site or contact the writer on the details below.

Yours faithfully,

Bugden Allen Group Legal Pty Ltd



Petra Lohmann

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Costs & Disbursements Price List

Description	Amount (excl. GST) A minimum of:
Letter of Demand/Notice of Action	\$ 150.00
<u>Local Court of NSW</u>	
Statement of Claim per the Court's Scale	\$ 252.00 to \$631.00
Default Judgment for Liquidated Claim	\$370.00
Default Judgment for Unliquidated Damages	Cost per unit
Writ for the Levy of Property	\$400.00
Examination Notice	\$220.00
Examination Order (on issue)	\$450.00
Examination Order (attending hearing)	Cost per unit
Garnishee Order	\$300.00
Certified copy of judgment or order (Certificate of Judgment)	\$150.00
Online document lodgment	\$ 70.00
Affidavits	Cost per unit
Local Court Warrant of Arrest	\$ 250.00
Notice of Motion and affidavit seeking orders for Substituted Service	\$ 450.00
Consent Orders seeking the setting aside default judgment on the basis of full payment; including correspondence with other side; attendances on managing agent and communications with credit reference agencies	\$ 850.00
Notice of Discontinuance	\$300.00
Terms of Settlement	\$650.00
<u>District Court of NSW</u>	
District Court Statement of Claim	Cost per unit
<u>Other</u>	
Payment Plan set-up	\$260.00
Payment Plan monitoring (per instalment: with or without default)	\$100.00 to \$180.00
Obtaining and reviewing ledger for payments	\$70.00
Obtaining and reviewing ledger for payments; seeking instructions	\$100.00
Field-call instructions	\$220.00
Skip-Trace instructions	\$160.00
Emails	\$80.00
Letters	\$90.00
Telephone attendances	\$70.00
Conducting online searches	Cost per unit
All other professional fees	Cost per unit
Admin Fee on matter creation	\$25.00
Monthly admin fee	\$10.00
<u>Disbursements</u>	
Which may include: search fees, process servers fees, court fees; express and/or registered post and the like	At cost

Please note: “*Cost per unit*” means the hourly rate of the staff member conducting the work, divided into 10 units of 6 minutes each:

Role	Hourly Charge Out Rate Range
Partner	\$650.00 - \$850.00
Special Counsel	\$550.00 - \$650.00
Consultant	\$500.00 - \$550.00
Senior Associate	\$450.00 - \$500.00
Associate	\$400.00 - \$450.00
Solicitor/Licensed Conveyancer	\$300.00 - \$400.00
LevyCollect	\$350.00 - \$400.00
Paralegal	\$200.00 - \$350.00