



Q & A

with

Kim Lisa TAYLOR

We recently had the pleasure of meeting with Kim Lisa Taylor, the founding attorney of the nationwide corporate securities law firm, Syndication Attorneys, PLLC located in St. Augustine, Florida. In addition to her responsibilities as a licensed attorney, Kim is a highly regarded speaker, author, syndicator and entrepreneur. She shared with us the latest updates about her company, the offerings available on her website, and the release of her book: *How to Legally Raise Private Money; The Definitive Guide to Syndication and Raising Private Money for Real Estate and Small Business*.

Q: First, please begin by telling us about syndication. How do you explain it?

A: Syndication is basically people pooling resources together for a common purpose. For example, it could be to buy real estate, a new business, or anything else an individual may need to pool resources to obtain. In the context of what we're talking about, it is when someone has an idea that they would need to raise money to achieve. Their first step would be to consult with us so we could provide them with options for legally raising the money they need from private investors. Then they would hire our firm to draft the appropriate offering documents.

Q: Syndication Attorneys, PLLC is a corporate securities law firm. What are securities offerings?

A: Securities offerings may also be called "Private Placement Memorandums," "funding rounds" or "investment rounds." A securities offering is a way for businesses to legally raise money by selling securities in exchange for investor funds. Additionally, it provides the

corporate structure that allows a business to share profits with investors and, at the same time, comply with applicable securities laws.

Q: How would you describe Syndication Attorneys?

A: Syndication Attorneys is a virtual law firm. We primarily practice under federal securities laws, so we can help clients nationwide. Our practice areas are corporate structures combined with securities compliance as our primary focus. Our mission is to help entrepreneurs create successful investment companies so they can achieve their business objectives while helping their investors achieve their own financial goals. We show our clients how to confidently and effectively raise money from private investors for their real estate investment businesses or

startup companies, but even more than that, we teach them how to leverage their time, become more efficient, and manage risks as their companies grow. If anyone would like more information on our company, I encourage them to please visit our website www.SyndicationAttorneys.com.

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Q: What makes your company unique?

A: Other firms may draft securities offerings documents for people who are raising money from private investors, but something that makes us unique is that we also have an affiliated company called InvestorMarketingMaterials.com. We create professionally edited and designed marketing materials for the same people who are raising money for private investors. These materials are available through the company’s webstore.

Additionally, we offer free educational opportunities. There is a lot of valuable information on our website (accessible through the Library tab), and we have ongoing teleseminars and monthly webinars (often with guests) where we discuss topics that can help prospective clients gain confidence, knowledge and expertise in raising private money.

Q: What specific educational resources are available on the website?

A: Currently, we have approximately, 40 articles on different aspects of raising private money as well as a section of Frequently Asked Questions (FAQs). In addition, I frequently speak at live events around the country discussing the principles of syndication, and those are often shared. We host virtual Clients-Only Syndication Masterminds multiple times per month.

Q: To whom or to what would you attribute most of your knowledge in this field?

A: I have been an attorney since 2002 and have been practicing securities law since 2008. Throughout the years, I have been

responsible for hundreds of securities offerings. When I first started doing this, I went to every training event I could find on syndication, and I read every book I could find, and I found a mentor. I also read the laws relating to it as well as articles written by others. I went to a lot of training events where I could learn the kinds of things my clients needed to raise money for, essentially learning what my clients were being taught about buying residential and commercial real estate, or creating startup businesses. I also did some of my own investing through group investments and created my own syndicate. So, I would attribute most of my knowledge to having the drive to pursue my training and research independently, which I continue to do today.

Q: How would you describe the staff at Syndication Attorneys?

A: Our staff consists of highly experienced securities attorneys, paralegals/law clerks, and other support personnel. We all work closely together to collectively provide an excellent experience for our clients and adhere to the highest standards of quality control in the offering documents we create. We also have relationships with other professionals who can provide the types of services our clients need to help them grow their businesses.

Q: What can we expect from your new book *How to Legally Raise Private Money*?

A: The book provides the step-by-step process of setting up and running (or investing in) a pooled investment structure. It has gotten great reviews, and people say it really helps them understand the process of organizing and conducting a securities offering as well as their legal obligations under securities laws. The book is available on Amazon, Audible, and Kindle, and a digital flipbook copy is currently available at InvestorMarketingMaterials.com.

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