



# MAXIS

A D V I S O R S

Maximizing Opportunities.

Incentives / Site Selection / Real Estate Advisory / Compliance

[w. www.maxisadvisors.com](http://www.maxisadvisors.com)



Your trusted partner for  
maximizing opportunities.



## We Are Maxis Advisors

For nearly **25 years**, **Maxis Advisors**, formerly known as Development Advisors (DAI), has provided **experience and expertise** to directly **increase project return on investment and profitability** for capital investment and job-creating projects for **Fortune 500** and **middle-market** companies.

Our **highly-skilled team** of former public officials and senior business executives has worked with clients throughout the United States on projects ranging from **\$2 million to \$1 billion in capital investment**. Our diverse industry sector knowledge, subject matter expertise, and market understanding -- combined with our background in the public sector -- consistently add value to your capital investment decisions.

**Maxis Advisors'** incentive packages represent more than **\$9 billion in capital investment** and **9,500 jobs in 42 states**, representing a variety of industries including manufacturing, distribution, office, and real estate development.



## Our Values

### Work with Integrity >

**Maxis Advisors** sets clear expectations by communicating and listening. We build trust by working on **long-term relationships** focused on **advancing company goals**. Personalities and egos are checked at the door to do what's best for the team and our clients.

### Live the Code >

**Maxis Advisors** team members are true to our word, which includes being **on time and prepared** for all phone calls, appointments, meetings, and commitments. We maximize opportunities by making the most out of every moment and interaction with **professionalism, preparation, and self-improvement**.

### Defined by Excellence >

Professionals who are exceptional at what they do make up our team. We **exceed expectations** by **paying attention to the details and fundamentals**. Our team is continuously working to overcome complacency and explore uncharted territory to gain maximum benefits for our clients.

We believe our clients deserve maximum results when they engage with our team members and our company.



## Stronger Together >

We work collaboratively as a team to achieve long-term goals. We are **better together** and approach all interactions with that understanding. We develop solutions with creativity, spirit, and enthusiasm rather than pointing fingers and dwelling on problems. Our team uses mistakes as teachable moments to improve our processes. Our feedback among team members is **Thoughtful, Specific, and Positive**. (TSP)

## Do Good >

Businesses will come and go, and economies can change overnight.

**People are what really matter.**

We demonstrate an unwavering commitment to doing the right thing in every action and every decision.

**Truthfulness and responsibility** are essential in keeping our clients' best interest and maintaining our integrity.

## Fire and Grit >

**Maxis Advisors** appreciates best efforts, but we reward and celebrate results. **We set high goals** with measurables to track progress and hold ourselves accountable. We are attentive to our clients and look for ways we can meet their needs by showing resourcefulness and initiative. We take personal responsibility for making things happen and **proactively figure things out**.

**We believe our clients are entitled to be represented in the utmost professional manner at all times with all parties, regardless of circumstances.**

## Our Services

### Site Selection

**Maxis Advisor's** comprehensive location analysis identifies and evaluates the **most important factors** for your company's location decision.



### Real Estate Advisory

**Maxis Advisors** effectively advises our clients in leasing and/or purchasing existing facilities, acquiring sites, and constructing new facilities. Our **expert advisory services** can assist with relocations, expansions, consolidations, subleases, acquisitions, and dispositions. **Maxis** is adept at partnering and/or coordinating activities by leveraging existing strategic relationships.



### Incentive Negotiations

We are committed to securing the highest level of financial and in-kind support for our clients' projects. Our negotiation process ensures that **every project is packaged and presented** in a manner that will maximize the value of incentives.

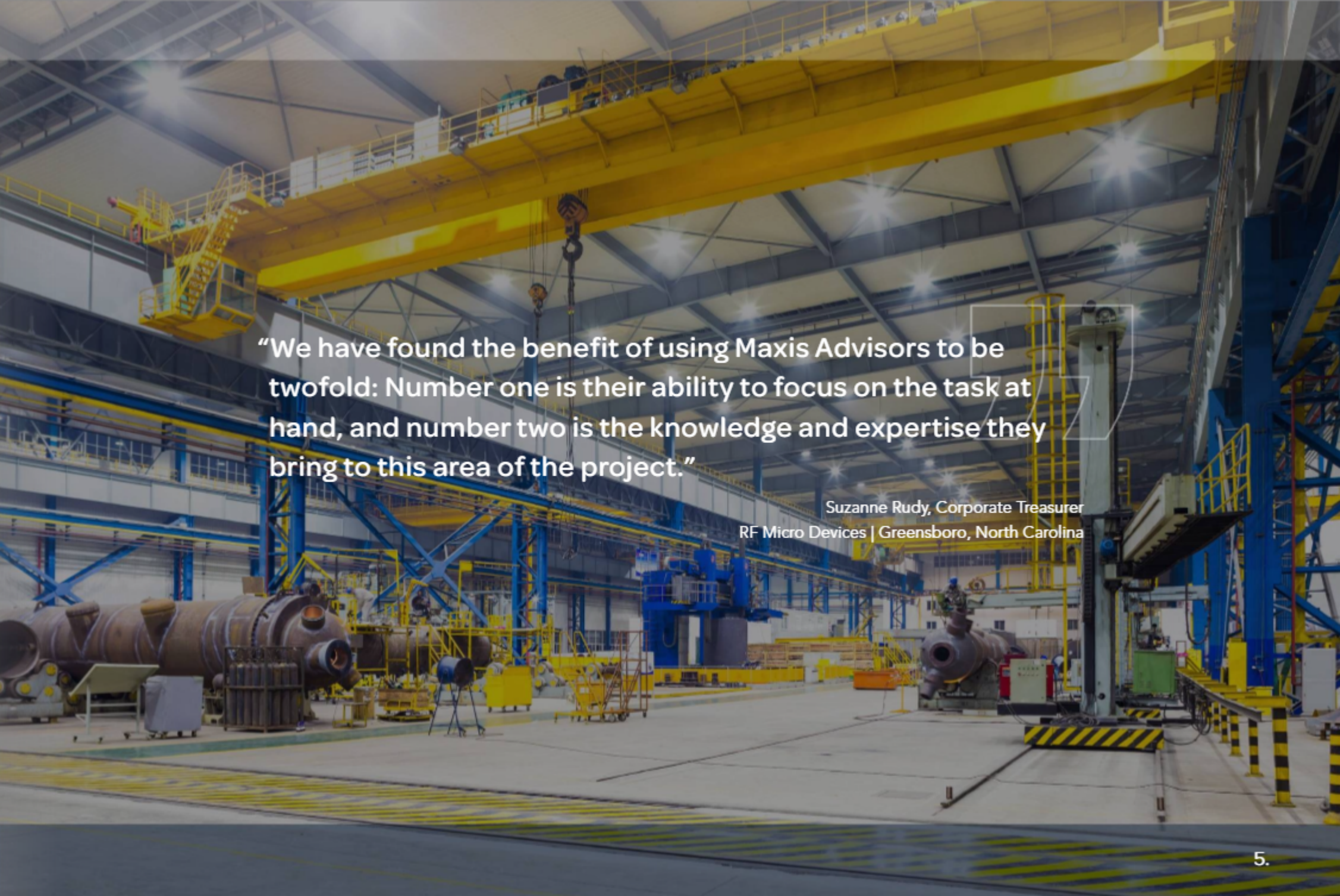


### Compliance

Management and project teams change over time, leading failures to collect previously awarded incentives. **Maxis Advisors** provides **post-project monitoring** and compliance support to ensure our clients receive all owed incentives **on time**.





A wide-angle photograph of a large industrial manufacturing facility. A prominent yellow overhead crane spans the width of the frame. Below it, the floor is filled with large, cylindrical metal components, likely parts of industrial machinery. The facility has a high ceiling with a complex network of steel beams and bright overhead lighting. The overall scene conveys a sense of large-scale industrial production.

“We have found the benefit of using Maxis Advisors to be twofold: Number one is their ability to focus on the task at hand, and number two is the knowledge and expertise they bring to this area of the project.”

Suzanne Rudy, Corporate Treasurer  
RF Micro Devices | Greensboro, North Carolina



# Site Selection

## Location Analysis & Selection

A comprehensive community cost analysis identifies and assesses the most important factors for your company's location decision using detailed criteria.

- Real Estate Requirements
- Location Analysis
- Access to airport, rail, port, major interstates, intermodal facilities
- Building and Site investigation
- Workforce and livability evaluation
- Environmental considerations
- Infrastructure needs
- Utility options and quality
- Proximity to suppliers/customers
- Incentive assessments



## Cost Analysis

- Comparison analysis between candidate locations
- Up-front entry costs: Infrastructure, Utilities, Roads & Fees
- Real estate acquisition cost
- Industry-specific costs
- On-going operational costs: Taxes, Transportation, Labor & Utilities

## Labor Analysis

- Labor availability profile
- Area Wage Cost Analytics
- Local existing industry intelligence
- GIS demographic heat maps
- Special workforce conditions: recent layoffs, military installations, industry cluster evaluation
- Access to area academic and technical skill graduates, certificate-holders
- Workforce Training assistance
- Skill-set specific targeting



# Incentives

## Incentive Analysis & Negotiation

**Maxis Advisors** is committed to securing the highest level of financial and in-kind support for our clients' projects. Our negotiation process ensures that every project is **packaged and presented** in a manner that will maximize the value of incentives.

### Maxis Advisors will:

- Identify and evaluate all incentive programs, including project costs that can be directly offset by incentives.
- Package and present the project to government and economic development officials
- Maximize the value of all incentives and negotiations
- Secure commitments in writing and outline the actual value of the incentive package
- Secure final approvals and negotiate terms of incentive contracts
- Perform post-project monitoring and compliance



We support the strategic decision-making of our clients in the strictest confidence, protecting their anonymity and improving their negotiation position.



## Granting Entities

Federal, State, & Local Authorities, Utilities, Economic Development Entities

## Triggering Events

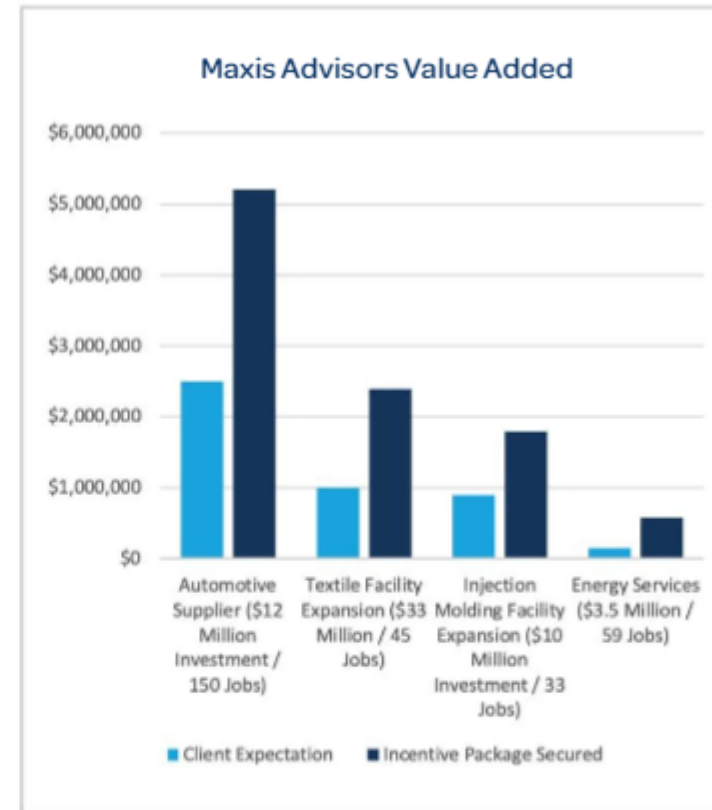
- Market Entry
- Expansions
- Relocations/Consolidations
- Mergers and Acquisitions
- Routine Capital Investments

## Incentive Packages/Capital Investment

- Typically range from **5%-20%** of capital investment
- Recent packages secured by Maxis Advisors represent **>10%-20%** of client capital investment

## Select Industry Examples:

Automotive, Aerospace, Advanced Materials, Bio/Pharma, E-Commerce, FinTech, Flooring/Furniture, Food/Beverage, Logistics, Metals, Plastics, Software/Tech, Textiles



## Projects:

Headquarters, Assembly, Data Centers, Distribution, Industrial, Manufacturing, Office/Back Office, R&D, Selected Commercial, Retail and Real Estate Developments

## Incentives (Cont.)

### Types of Incentives

#### Statutory - "By Right"

Incentives which are provided to companies by a matter of law

- Typically provided via state income tax credits
- Articulated fully at no cost to the client

#### Statutory - "Negotiated"

Incentive programs which are available by statute - however, the commitment and value is value is negotiated on a case-by-case basis.

##### Examples:

- Workforce Training grants
- Property tax reductions
- Payroll tax reimbursements
- Sales tax exemptions


#### Discretionary Impact

Incentives that are only offered when negotiated in conjunction with a competitive project.

##### Examples:

- Land/property subsidies or donations
- Cash grants for construction and equipment
- Site preparation grants and in-kind services
- Utility rate reductions
- Infrastructure upgrades
- Railway extensions
- Moving cost reimbursements
- Payroll withholding reimbursements
- Port fee reductions
- Fee waivers





"I am sure you know this, but your clients think you guys walk on water. We're looking forward to working with you." "

Alan Asbury, Controller  
Mountaire Farms | Lumber Bridge, North Carolina



## Compliance

Once **Maxis Advisors** negotiates a successful incentive package, we take steps to ensure our clients receive full benefits.

Incentive programs require on-going compliance management over multiple years. Thorough compliance takes **valuable time and resources**. We can assist clients by applying our expertise to help administer, report and collect business incentives on their behalf.

### Advantages to using Maxis Advisors for your incentive compliance:

- Single point of contact for coordination
- Handle burdensome reporting requirements
- Recognition of programs' nuances and intricacies
- Ensure continuity in case of internal turnover
- Specialist to track legislation, regulatory, and policy changes
- Peace of mind that incentives compliance managed by experts to free client to focus on core business

**Maxis Advisors** works with our clients to **help train** and coordinate your staff to track and gather data accurately. Our services include preparing a calendar and work plan to itemize all action items, and to continue to negotiate and mitigate with appropriate **state and local officials** during changing performance conditions.





"Hiring you was one of the best decisions we made on our project. You accommodated our management style, and you really added value. We appreciate everything you've done for us."

Mr. David M. Walsh, Sr. Vice President, Manufacturing & Service  
Mitsubishi Power Systems Americas Inc. | Orlando, Florida



## Real Estate Advisory

Professional representation in commercial, office, or industrial real estate transactions ensures that all viable sites are identified and evaluated, on time and within budget.

### Maxis Advisors will:

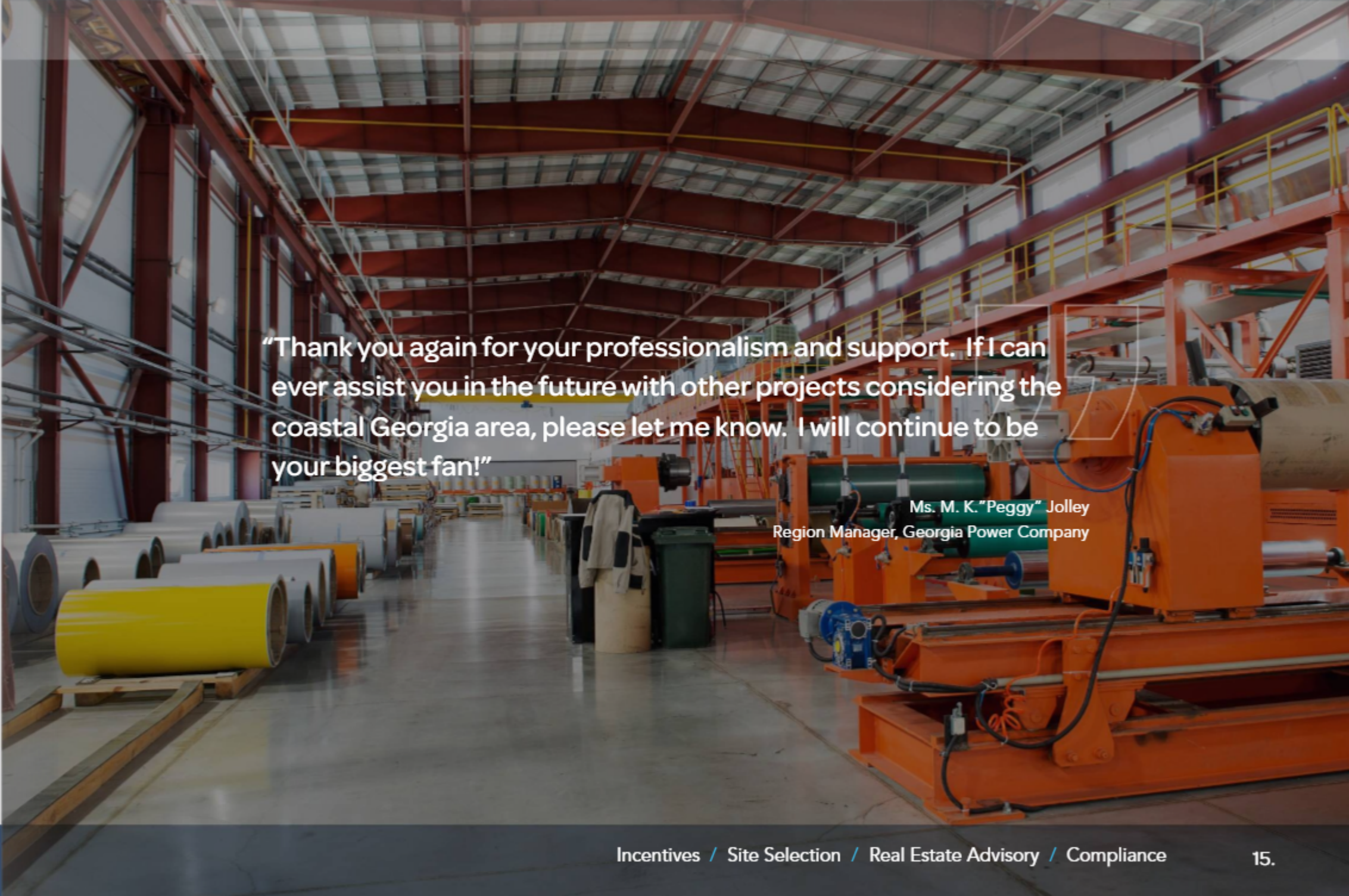
- Provide site and building identification.
- Negotiate terms of lease, purchase, and/or option.
- Coordinate due diligence and collection of building/site history.
- Identify costs and expenses
- Provide professional brokerage services
- Eliminate the need and expense for an additional 3rd party real estate company

We have **effectively advised** our clients in leasing and/or purchasing existing facilities, acquiring sites, and constructing new facilities.



We aim to deliver to our clients the **highest value** achievable, whether that is with a single focus or in partnership with their strategic allies.





"Thank you again for your professionalism and support. If I can ever assist you in the future with other projects considering the coastal Georgia area, please let me know. I will continue to be your biggest fan!"

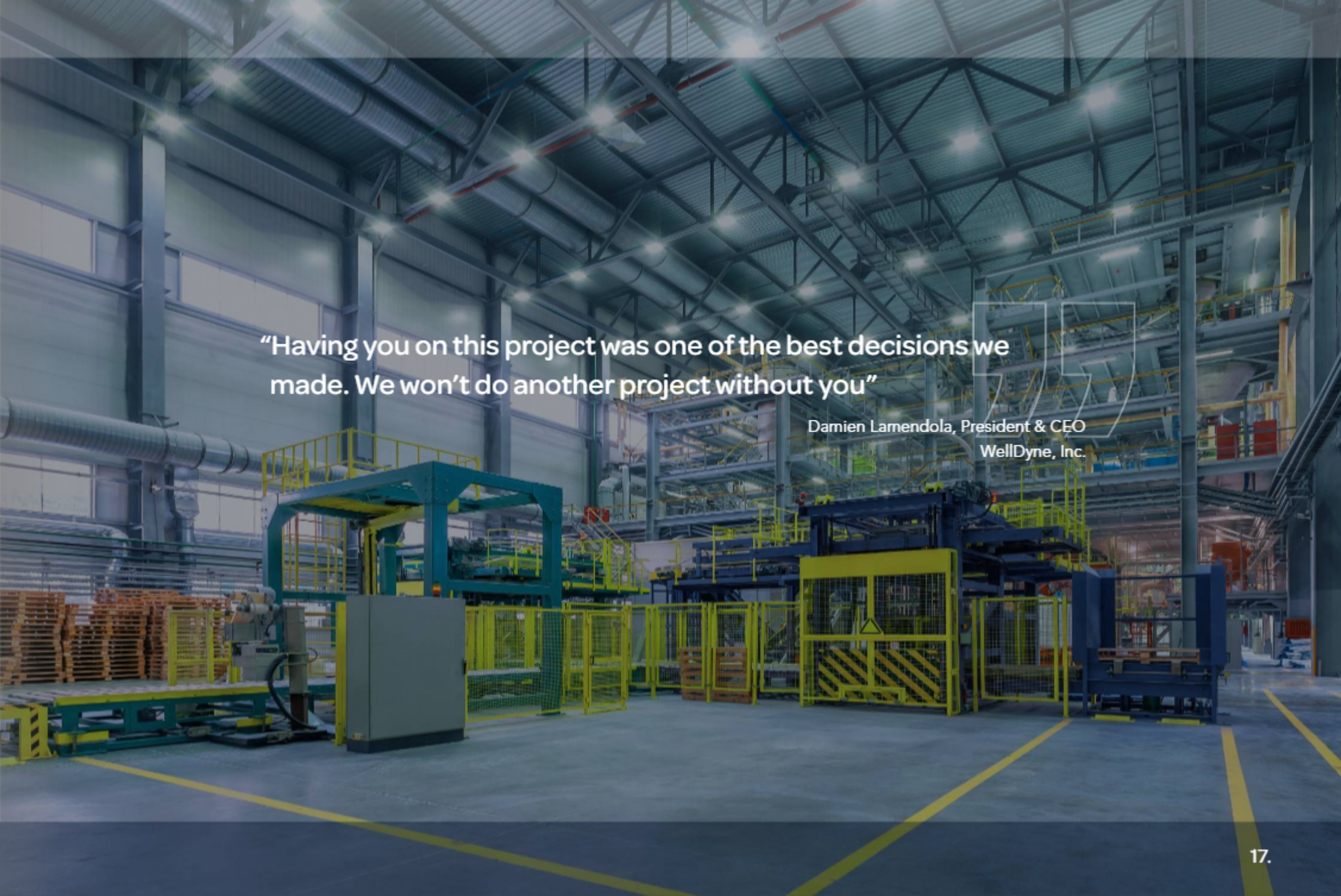
Ms. M. K. "Peggy" Jolley  
Region Manager, Georgia Power Company

## Select Maxis Client Portfolio

- ACE Hardware
- Bestco
- Caesarstone
- Coca Cola Bottling
- Constellium
- Coroplast
- Consentino
- Frontier
- Gildan
- Harvest
- Mitsubishi Power Systems
- Montaire
- PulcraChemicals
- Qorvo
- Schaeffler
- Sealy
- Snap-on
- Steag







“Having you on this project was one of the best decisions we made. We won’t do another project without you”

Damien Lamendola, President & CEO  
WellDyne, Inc.





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