

Faulkner Equipment Rentals LLC relationship proposal

Riverstone Community Bank prepared this short review to make the next banking conversation practical: what may be needed, what to review first, and how to move quickly without creating

DEPOSIT POTENTIAL

\$441K

ANNUAL FEES

\$2K

TOTAL POTENTIAL

\$1.8M

RECOMMENDED SOLUTIONS

- SBA / commercial lending review: Creates a lender handoff when source signals indicate expansion, equipment, or working capital needs.
- Relationship rate review: Supports the relationship manager conversation implied by the current signal.
- Business DDA: Creates the operating account foundation for payroll, vendor payments, merchant settlement, and daily balances.
- Relationship review: Brings retention, wallet-share, renewal, and treasury opportunities into one banker-led conversation.

NEXT STEPS

- Confirm the right business contact and decision process.
- Complete a short discovery conversation with the assigned banker.
- Review account, treasury, lending, or mortgage options that fit the verified need.
- Document next steps, timelines, and product owners after the meeting.

DISCLOSURE

This one-pager is a relationship-service discussion aid. It is not a credit offer, mortgage preapproval, rate quote, or guarantee of product availability.

Faulkner Equipment Rentals LLC banker prep

Jordan Lee | Relationship Manager | Faulkner County | Core Intelligence

PRE-CALL BRIEF

- Faulkner Equipment Rentals LLC is a medium priority Relationship Manager action owned by Jordan Lee.
- Days to maturity: 46 | Relationship age: 64 months
- Product lead: Renewal, Relationship rate review, Deposit retention.
- Dollar basis: Bank-owned internal extract preview using hashed account IDs only.
- Source proof: Sanitized core relationship extract; observed May 27, 2026 demo extract; confidence Demo.

DISCOVERY QUESTIONS

- What has changed in balances, payments, maturity timing, or product usage since our last review?
- Which parts of the relationship are still outside the bank today?
- Would consolidating deposits, treasury, lending, or cards reduce friction for your team?
- What changed recently that makes Faulkner Equipment Rentals LLC worth reviewing now?
- Who else on your team should be involved before we recommend account structure or treasury services?

MANAGER APPROVALS

- Deposit pricing or liquidity exception: Larger deposit or liquidity conversation may need pricing discipline.
- CRM attribution: Meeting package generated; next stage should be measurable.

WHAT NOT TO SAY

- Do not imply private competitor knowledge or claim the bank knows where the company currently banks unless the source explicitly proves it.
- Do not promise approval, a specific rate, or guaranteed product availability.
- Do not use source data for credit eligibility, prescreening, or adverse-action language.
- Do not call a record labeled Direct-mail only, Needs review, or Do not contact until the allowed channel is clear.