Meeting Title: Little Tree Capital | Michelle Bryant & Mike

Meeting created at: 15th Jun, 2026 - 10:02 AM

Michelle Bryant - **00:00**

Thanks. Yeah, I'm doing okay. The weekend was good. Got some promising news from. From Matt and things are going well there. As good as can be expected, I guess. But, yeah, all good. How's everyone?

Tiffanie | Project Manager - **00:20**

We're good. Mike actually just came back from the gym, so he's joining from the car. But I'm recording this meeting and we're. We prepared a little agenda, but I'll let Mike talk about what he's up to because you'll never believe what he's going to do in the next couple days. Mike, why don't you tell Michelle? What are your big plans for next week?

Mike David - **00:41**

Yeah, so 15 years ago, I went on a trip with some of my good friends. We've been friends for 20, 25 years. We did a yacht week in Croatia, and at the beginning of the year, we realized weren't really hanging out together too much. So we said we have to, like, just book it, put it in the calendar, otherwise it's not going to happen. So that week is coming up this next week. So leaving Friday to Croatia with some very good friends. So looking forward to it. And also I'm trying to work in taking up Richard's team on the offer.

Tiffanie | Project Manager - **01:19**

For.

Mike David - **01:22**

A tour of Virgin HQ in London. So trying to work that in. I hope we can do it, but.

Michelle Bryant - **01:29**

Yeah, that's amazing. So you're gonna be on a yacht in Croatia? Is that what I mean?

Mike David - **01:34**

Yes, yes, pretty much.

Tiffanie | Project Manager - **01:35**

Yeah. You know, Michelle, you know how one thing he does everything. Yeah. He's gonna be. There's like a chef, there's a captain,.

Michelle Bryant - **01:43**

There's, I believe, one of my guilty pleasures. I hope I'm not gonna see you on below deck Mediterranean thing because I do watch that show. That's my guilty.

Mike David - **01:55**

Yeah, I'm not familiar with that show, but it sounds like a lot of drama, I'm sure.

Michelle Bryant - **02:00**

Yeah, it's about yachties. Yachties working on these big yachts where they have clients, you and your friends.

Mike David - **02:08**

Oh, wow. Okay. Yeah, yeah, we're gonna, we're gonna. They're gonna earn their money next week. Let's just put. No, but it's gonna be good. We definitely don't want me driving that boat. So I'm glad somebody's taking the reins on that.

Tiffanie | Project Manager - **02:24**

But, yeah, gonna be so, so fun. And, yeah, my weekend was super good. Very here it's like, humid and hot and, like, my hair is finished for the rest of the summer. There's nothing I could do for the rest of summer. But it's just been really, just beautiful. It's nice that there's no snow and stuff, so. So I'm grateful. Yeah. Very grateful.

Michelle Bryant - **02:46**

It was 30 degrees here yesterday.

Mike David - **02:48**

Oh, wow.

Michelle Bryant - **02:50**

Yeah.

Tiffanie | Project Manager - **02:54**

I'm sure by the end of this meeting, you guys will start seeing, like, little pigtail curls happening by, like, within half an hour. It is what it is. So I prepared a tiny little agenda for this meeting. I know this is our first weekly meeting. It's very possible that next week we might have to skip it just because Mike's going to be traveling, but we'll be pretty consistent throughout the weeks following that. The first thing that I had on the agenda was obviously planning the meeting with Jared. Colin, Teresa wanted to talk to you guys about what that looks like. Mike had a question about is it on Zoom or is in person? So we'll talk about that next is. We do have quite a few submissions for extra information from the. The app that we sent all those contacts to.

Tiffanie | Project Manager - **03:39**

I wanted to check in with you, Michelle, and see if there's anything that you received on your end. And then what I did was I'm preparing a small CRM for you guys. You're collecting all the data from everyone that has signed up to the newsletter or signed up to receive more information. Then it's completely up to you what. What you want to do with that. So those are my two things for today. And then obviously anything that you guys want to talk about as well. So I guess we'll start with the meeting with Jared. So, Mike, you asked. Is it on Zoom? Michelle, do you know if it's in person or on Zoom.

Michelle Bryant - **04:19**

With the. With Colin and his. His council?

Tiffanie | Project Manager - **04:23**

Yeah,.

Michelle Bryant - **04:26**

We haven't. We didn't decide when we left the call if it was going to. And I guess that's something we can just ask. Ask them is like, would you prefer us to come in person or would you like us to do this on Zoom and kind of leave it up to them? And. And I guess this is for discussion for our team is the relationship build doesn't happen on Zoom. And there's an in person element, especially when it comes to money, significant amounts of money for the nation. And so we could do it. We can do it in one of a few ways. We can do it entirely on Zoom if that's what they want to do. We can be entirely in person or we could do a hybrid where I'm in person and Mike and Jarrett are on Zoom. But it's really.

Michelle Bryant - **05:14**

It sounds like they want to work with us. So my inkling is to be in person.

Tiffanie | Project Manager - **05:21**

Yeah, I know.

Mike David - **05:22**

I would agree.

Tiffanie | Project Manager - **05:23**

Yeah. And Mike, I, it depends on how you feel, but I find you and Michelle together are really strong together. I agree that Jared could be on Zoom, but if were able to find a date that would work for you. Is it something Michelle, Is it in Vancouver we're calling there?

Michelle Bryant - **05:40**

Just outside of Vancouver. Yeah.

Tiffanie | Project Manager - **05:42**

Perfect. So Mike, what do you feel about this one? Would you rather show up in person or would you rather do it on Zoom and Michelle is in person?

Mike David - **05:53**

Yeah. So I guess it would depend what level we're at with everyone. If it's intro versus like doing the full presentation, I agree. In person is always better. I think just to make the best bang for the buck. If we can stack a couple of them, that would be ideal. But I understand if it can't happen like that. So yeah, that would be the main, main considerations, I would say.

Tiffanie | Project Manager - **06:32**

Yeah. So then if you want to stack them, I think July 7th is a bit soon for you, Michelle. That only gives three weeks. That's not a very long time. The other dates that they proposed, did they work for you, Michelle? The 21st or the 4th? I know they didn't work for Jared.

Michelle Bryant - **06:51**

Yeah, the 21st worked for me. And I also sent in the text a bunch of dates that do work in the morning for me as alternatives as well. To check with Mike's calendar too.

Tiffanie | Project Manager - **07:03**

Yeah, Mike is okay on the 21st of July. Unless something has changed. Mike, do you have any new travel plans that are not in your agenda yet?

Mike David - **07:12**

Well, the, the training, the NLP training that I wanted to do is Orlando and it's for two weeks and it might be during that time. So I would just need to verify that I can get those dates. I can get those dates later today,.

Tiffanie | Project Manager - **07:29**

The 4th of August. Did that one work for you? Just check my other because that might work the best for Mike, to be honest, if he's doing that course. Plus that will give you a six week Runway to get as many meetings booked and really do that whole big dinner plan that you guys had where, you know, the connection dinner that we spoke about when were in Vancouver. August,.

Michelle Bryant - **08:06**

August 4th doesn't really work for me. I have a meeting with council that day.

Tiffanie | Project Manager - **08:15**

Okay, so then we might ask for a later date. Is that. What if Mike is going to be in the NLP training, which I'll confirm with Leia right now.

Michelle Bryant - **08:31**

Do any dates work in July with those Dates that I sent for Mike,.

Mike David - **08:37**

For me, it all. The only thing I have planned would be that training. So. And two weeks is kind of a, a big block there.

But also. Oh yeah, if we're talking for in person, then yeah, that would change. If, if it was virtual, then I could just pop out and do the call. But yeah, for this specifically. So.

Tiffanie | Project Manager - **09:07**

From what I understand, I'm guessing that they meet every three weeks. I think that's their. If I look at it's the 24th. 21St, the 4th. So it would mean that they would meet again on the 18th of August. I don't know if that's too lately not.

Michelle Bryant - **09:23**

Most first nations take a good chunk of August off.

Tiffanie | Project Manager - **09:26**

Okay, so July is really the ideal. Yeah. Okay. Okay. So Mike, do you happen to know the dates for your NLP training by any chance?

Mike David - **09:37**

I would, I would.

Tiffanie | Project Manager - **09:41**

As well. But.

Mike David - **09:50**

Let me double check my email.

Michelle Bryant - **09:57**

Because they did say it doesn't have to be on a Tuesday. They could, if we suggest dates, they could bring. They could bring the council together.

Tiffanie | Project Manager - **10:18**

So then maybe we'll do it either right before Mike leaves for that training or right after. We can suggest a couple dates once we know Mike's dates.

Mike David - **10:27**

Here it is. So if I do both, it would be July 11 to July 26. So yeah, it's quite a big chunk.

Tiffanie | Project Manager - **10:37**

So that's awesome though, because the 28th, so Orlando. So if you were to fly from Orlando to Vancouver and then back home, that would kind of make sense, right?

Mike David - **10:48**

Yeah, I can do that.

Tiffanie | Project Manager - **10:49**

Yeah. So Tuesday the 28th, was that a date that you, Michelle had wrote that would be good for you?

Michelle Bryant - **10:56**

Yeah, the 28th and the 30 and the 31st that week work for me.

Tiffanie | Project Manager - **11:02**

Okay, so then the next thing I wanted to ask you is if Jared says that he's away on construction holiday for that time. Mike, did he tell you that he was away vacation or you just say the first date works for me?

Mike David - **11:15**

Yeah, he just said the other two dates don't work for him.

Tiffanie | Project Manager - **11:20**

So I'll ask him for the week of the 27th to the 1st. I'm sorry, for the 30, basically the last week of July. See what he says. And then I'll go back to Teresa with that date. Depending on what Jared comes back to us with, both of you will be there in person and then Jared will join virtually so that he can talk about the things. The licensed part of that meeting. And then that gives us enough time. So just because we won't Be meeting next week and I think there's quite a lot to do before that meeting. Could you give me your vision for what your pitch, what you'll need me to prepare, what will make it a successful meeting? Yeah. What do I need to have ready for you guys for that date?

Michelle Bryant - **12:08**

Yeah. So just for clarification, only those two dates, the 28th and the 31st, work for me that week because I will be presenting to council budget amendment on the 29th and 30th. So vision for meeting for the first time. It would be an introduction, get to know each other. It would be a shortened version of the presentation that we gave at Indigenomics. Kind of key points, keeping it simple and then going into the structure of Little Tree capital and what we're like the kind of the story is this is the why we're building it and how it will work for you. And so we'll need to do a little bit of research on the First Nation.

Michelle Bryant - **12:51**

Anything that we can find, anything that Colin is willing to give us to prepare for the meeting so that we can really tailor it, understand who is on council and maybe get some information from Colin. In terms of. Councils can be really finicky and they could not, they're not always cohesive with each other. Is like what are the. The big points in relation to finance that are the hot topics for council? We want to know that before going in. And so in the past, in my old world working with industry, that's the data mining we would gather before. So we would do our research and then we would ask some really critical questions that we would need to get from our client in those spaces so that we can prepare for what we're presenting to them.

Michelle Bryant - **13:49**

So for my point of view, that would be kind of the biggest piece. We would need to understand where we are in the build out of the structure. Because if we're not fully built out by the end of July, we need to give them a time late, a timeline for when we will. Because it sounds like they want to do something soon. It sounds like we want to also give them a little bit of information on how to build out a investment policy statement, not give them financial advice, but things to consider as you're planning how your settlement is going to work for your community. And that we are, we can help with a part of it. Like we would want to see them diversified even more. But until they diversify and if they take.

Michelle Bryant - **14:46**

Need to take time building that out this is an option or it's an option for part of their settlement while they figure out what to like if they need it for capital investments, if they need it for disbursements or what have you. So if we can kind of help them, help guide them through that process, not to just align to us, but like helping them see the holistic picture. Because from what it sound like on the call, they really didn't have that. They really just didn't know what to do with the fact that they have money sitting in a bank account and they have 50 million coming and they're. They don't really know what to do with it because they haven't been given the right information. So let's focus on giving them the good information.

Mike David - **15:31**

Yeah, yeah, I, I think. No, sorry, what.

Tiffanie | Project Manager - **15:38**

Just to. For clarity on roles, responsibilities and scope for more for me, because I, when. When you say we, I just want to make sure all of that information content would have to come from you in either an email or a Google Drive or any kind of content. And then what I would do is I would put that together in a beautiful kind of like a magazine style presentation booklet. I would get them printed in advance. I would make sure that you have them ready. Depending on the number of council members, will have one for each council member and we'll have Jared's portion in that as well. Michelle, have you ever seen those like presentation magazine style booklets before?

Michelle Bryant - **16:22**

Not printed form but. But the one that you did the very beginning of our talks for Little Tree. Yeah, they look great.

Tiffanie | Project Manager - **16:32**

Yeah, it'll be something like. I'll just show it to you really quickly so that you see the vision of what that looks like. It will take a bit of time, but I have a lot of Runway. It's kind of like this here in your obviously in your branded colors. This is obviously for an interior design thing, but it'll be for you guys in the branded colors. So I guess my question is, do we have. And it's more to you, Michelle. Is there enough time for you to create all of that content for me before at least two weeks before that meeting so that I could work on the layouts, the printing, all of that or do we need a little bit more time?

Michelle Bryant - **17:11**

Yeah. And I guess the piece that I would need support on is that research piece is coming, is asking Colin, what information can you give us about. And I guess I can put that in an email as well. Yeah, I wouldn't. I'd be able to give you the bones of it but the structure of it, I don't have time to do all of it.

Tiffanie | Project Manager - **17:35**

Might need a bit more time then. Mike, what are you thinking in terms of how to do this? Do you think that part's the most important part? We need to have all of our ducks in a row or should we go to this meeting and not have all of that? What's your vision for that?

Mike David - **17:52**

Yeah, I definitely see some. Tailoring it to their needs and as much research as we can. For sure. I was also, I think the other piece would be give them like a 360 view of what are the options. And that would come from, from Jared, what, you know, what could be. Offered through Little Tree Capital and by way of Vesta as well. So if we could talk about Obviously the 6% product Jared sent me personally, a growth product that was created by. I was. Is it Blackstone or is it Black. Black Rock? That's, that's the one. Yes. Thank you. So, so I think giving them options on what a diversified portfolio either could look like or just like the suite of options that they would have that we could give them access to. And I wanted to ask you guys.

Mike David - **19:13**

So I will be, you know, investing through Little Tree Capital with Vesta. Should I kind of bring that component to it as well and just kind of like talk about my why I'm investing with them and the, the suite of options that I guess the thought process and the options that I'm going through to make that. Yeah. So like for example, I, I would say look, right Now I'm getting GIC. That is, that has 2.75%. I'll be investing in the 6% and here's maybe even the dollar difference that I would expect over the next year. So that could be interesting. And then you know, it just reinforces that I'm going first, I'm going to be the first investor why am I doing it, you know, and the kind of the clear benefit of taking that route.

Mike David - **20:20**

And then I'll probably invest in the, the BlackRock growth option. That's a three year hold also. So what are. So maybe I can, you know, talk a little bit about that. Obviously Jared would be able to explain it much more. But yeah, maybe just adding that personal what I'm doing, why I'm doing it. So yeah, I can bring that component for sure and then have.

Tiffanie | Project Manager - **20:55**

Jared, there's a question for you. You want that in your pitch presentation booklet as well, not just for the actual presentation itself. But you want that kind of like in the information booklet about Little Tree Capital, Right.

Mike David - **21:10**

What do you guys think about that? I, I, I'd like your perspective on that. Do you think how much value would it add necessarily? Because that would be like a real allocation, right?

Tiffanie | Project Manager - **21:22**

Yeah, yeah. Sounds like a case study or a testimonial type of thing. You know, I think there's a lot of value in it and if it's for three years, that information will stay for a while. So it's not like we'll have to change that booklet every year or every couple of months. And as long as that's legally compliant to share and that you're okay with that. I'll check with Jared first, you know. But Michelle, I, I don't know if you agree. I feel like Mike saying that is a good way to show your skin in the game and he believes in it and all of that.

Mike David - **21:54**

Yeah. And also, yeah, like the other aspect of that would be like here's what the banks are offering, here's maybe even what some adv, what wealth advisors have suggested and then yeah, just the reasoning why you know, like I'm getting institutional grade investments through Vesta with Vesta and that we could offer essentially the same thing. So yeah, just kind of like thought process and case study. Exactly that.

Michelle Bryant - **22:33**

Yeah. I don't think there'd be any downside to it. To me it would be like a brief commentary. And after you said that Mike, I was thinking, well, because I, I would have to park my, the proceeds from the sale of my house in Prince Rupert once it sells into a non registered account and like, well maybe I register, I, I put it in Little Tree as well. Through Little Tree as well. Just because it is, it's a big part of like we believe in what we're building so we have our own resources in there as well. I think it's a good idea.

Mike David - **23:09**

Yeah, yeah. We're, we're eating our own dog food, right? Yeah,.

Michelle Bryant - **23:16**

Yeah. And so question in terms of,.

Tiffanie | Project Manager - **23:22**

Are.

Michelle Bryant - **23:22**

Just letting you know where my capacity sat and definitely can come up with the, like I said, the outline and the skeleton of what we need to go in there. But in terms of like needing assistance with the research of the council, the members, I can reply to Colin with some key questions that I would need. But in the background if there's anything Tiffany, that you can find on the band itself that would support us in creating our presentation would be definitely helpful.

Tiffanie | Project Manager - **24:02**

Yeah. Give me a bit of direction and let Me be, like you said in the background, if you could manage the relationship and the communication and then you can just let me know, like, okay, I got this info, here's enough info that I could get going and create everything that you need. I want to make sure that I'm doing this justice and that I'm, you know, there's so much that I don't know, so I just want to be respectful of your vision and all of that. So, yeah, whatever you send over, I'll work on and then what I'll do is I'll send you a draft and you could edit it and at least like, the big part of the research will be done and then you could tweak it and make it better and then we could move it into like a final presentation.

Tiffanie | Project Manager - **24:43**

Is it important for the website to be finished by that date as well?

Michelle Bryant - **24:48**

I think it would be helpful because what if we're starting to meet with councils? We're going to need. They're going to look us up. After my meeting with Andy with Anishka Nation, he's like, I'll look you guys up. I'm like, well, our website's not quite ready yet, so we do need to have some kind of presence.

Tiffanie | Project Manager - **25:12**

Yeah. And do you need social media also, or is that not important for this particular company for now? And, and I asked that more because of bandwidth, not because of. Yeah, it would be great to have, you know, I get that.

Michelle Bryant - **25:26**

But, yeah, and I think even just at the smallest scale, a LinkedIn profile about little tree capital with a post about our. In our impact and that. That's it. That's all we would need at this point for LinkedIn. And then as we build things out and we have capacity, we can add to it.

Tiffanie | Project Manager - **25:48**

What. It's great timing because at the end of June, we're actually going to get the video footage edited so we can actually put that onto our website and onto our LinkedIn. So that gives me almost all the content that I would need. So that's great. We. We do have a LinkedIn company profile, but like you said, there's nothing on it. You know, there's a few people who have followed it, but it needs some work, so I'll put those. There's not much on it, but I think with impact, that's where we can stretch the content, we can create. What I was planning to do is create these short little reels, you know, 30 seconds of valuable content from that speech and then, you know, we stay top of Mind that way as well.

Tiffanie | Project Manager - **26:34**

Okay, so then those are my to do's obviously I'll probably work on that in first position because I'll wait for Michelle to give me the shell of what that booklet that pitch is going to look like. We'll get back to Jared also if he could send me as much information as possible what he would want to see in that booklet. So that will help me out. Is there anything else that you are thinking would be on my to DOS for the next two weeks before our next meeting? And our next meeting will be in two weeks from now. So it'll be 29 June.

Mike David - **27:12**

I think the one thing as far as. So I'm just kind of thinking if I'm going in there, yes, I'm investing in X, Y and z. But the 6% product that's gonna. That may require a commitment from one of the bands before we actually start that thing. Right. So. Because that's when the meter starts essentially. So yeah, the startup costs would have to kind of be.

Tiffanie | Project Manager - **27:47**

From what Jared said that kind of goes together because he says the next round that they would be able to invest like the soonest is September from what we discussed last week. So if we can get the commitment from them in July after we meet with them and then you'll have that reassurance that like okay, they're starting to invest in September, that's the soonest. So it kind of works out.

Mike David - **28:10**

Yeah. Did, did they give a timeline on when they're going to be receiving their next.

Michelle Bryant - **28:17**

He said in the next few months.

Mike David - **28:19**

Okay, okay.

Michelle Bryant - **28:22**

Soonest would be September anyway. And I guess Tiffany finding out from Jared the actual cutoff dates for each quarter for when people would be able to invest because it. We could get commitments but it may not always be for like the next available quarter. It might be another quarter depending on when their gics run out or come to an end.

Mike David - **28:50**

Yeah, I think that would be good. And September's sounds like it would give enough Runway to give them that option and also have a hard date like you're saying give them if they want to participate in this next round. You'd have to let us know by September 8th for example. So. Yeah, that's great.

Michelle Bryant - **29:17**

Yeah. Yeah. And Mike, did Jaron let you know how much we need to have committed to cover the costs for the first.

Mike David - **29:29**

Well, I, I think it's just a matter of adding up the. Adding up the costs which.

Tiffanie | Project Manager - **29:40**

250 Is the cost.

Mike David - **29:42**

250 Total all with Vesta being 150. 150. So 2% of 5 million, for example. About. Yeah, about 5 million. Well, to cover.

Michelle Bryant - **30:04**

10 Million.

Mike David - **30:06**

Oh, wait, sorry. Or am I doing the math wrong?

Michelle Bryant - **30:10**

So 2% of 10 million is 200,000.

Mike David - **30:14**

Okay. Yeah.

Tiffanie | Project Manager - **30:19**

And I'm just gonna throw it out there. But Mike, would you agree that even if you get, you know, a five million dollar commitment, I think that still. Would that give you at least. That would be something. And, and would that give you that peace of mind of like, okay, let's open the company or do you really want like a minimum of 10 million as a commitment? What's your like, minimum for you to say, okay, I'm spending this money.

Mike David - **30:46**

Great question. Now we could talk to Jared to see when exactly would the meter start, Right. Is it on day one? Is it spread out over the year? Is it.

Tiffanie | Project Manager - **30:59**

Right, I know that answer because we asked him a few weeks ago. So for Norton Rose, it could be right away, or Jared might be able to convince them to wait until there's enough money in the bank up to one year. He said, though this was a couple of months ago, he said that it's a we'll see kind of thing. And when it comes to Vesta, it could be after the first year. Jared said that it's only when the money really starts coming in. So he's more flexible with that. Obviously if you're asking him to come to a lot of meetings and do a lot of, then that might be a bit different. But you know, he said that there's flexibility on the Vesta side a little bit.

Mike David - **31:41**

Yeah, yeah. And yeah, apologies, I did the math wrong on that. I thought 502% of 5 million is only 100,000. So yeah, I, we can, we can ask him that specific question and how exactly can we.

Tiffanie | Project Manager - **32:01**

Perfect. Okay, so I'll ask him that question. And Michelle, for Swanish, do you think the weeks of July 28, the dates of 28th or 31st, those are days that you would be able to stack a few of them? Yes, a few meetings into that day.

Michelle Bryant - **32:17**

Yeah. So what I'll do is I will reach out to the Chief of staff and say, do any of these two dates work for a council workshop meeting to present? Yeah, I'll do that as well. And I can also reach out to Andy with Nishka to see if they're, they will be in Vancouver and on any of those dates so we can possibly have One, two or three happening.

Tiffanie | Project Manager - **32:45**

Then would you like me to look up other potentials and kind of send those over to you? I wouldn't do more than three a day. Oh yeah, it's just. I don't know how it is for I usually try to book multiple of them because some cancel at the last minute. The conversion, you know instead of the conversion ratios.

Michelle Bryant - **33:06**

It doesn't work for personations I'm telling you right now because if we can't have a back door when we're dealing with relationship with first nations because it feels very transactional. Just as a like as a rule whenever I'm meeting with the First Nation I never book something immediately after because those meetings can run long. It's always leave one or two hour buffer for moving on to the next meeting. Especially in an introductory meeting. Yeah,.

Tiffanie | Project Manager - **33:38**

Perfect. Okay, so I'm really clear on my to dos for the next two weeks. Is there anything you both want to talk about? I know we're. Michelle, did you have a hard stop by the way at 7:30?

Michelle Bryant - **33:50**

No.

Tiffanie | Project Manager - **33:51**

Oh amazing. So yeah. What else would you like to talk about in today's meeting?

Michelle Bryant - **34:01**

I guess how my brain likes to work is kind of a structure. So we're working towards this one meeting with Colin and his council and we're trying to get required so the pieces were just talking about if I could see those like on our page just in a linear. These are the key things. These are the milestones that need to happen and when they will happen just so we can see longer term. And then in my brain I'm like okay, by this date I need this and we need to figure out this. And because we're creating something from scratch. It's been my experience that if you don't have that laid out you forget a lot of things and then you're scrambling at the last minute.

Tiffanie | Project Manager - **34:54**

Oh for sure. On our project management site I'll for sure have a tab just for this. After this meeting I'll put all of our to do's. All of the timelines make it really clear and then you can always reference that. I want to let you both know that I'm probably going to have to change the domain because when you look up little tree capital our dashboard is actually the first SEO. So I'm going to change that so that it's. You know I didn't think of that but I should have. But yeah, I'll work on that this week. For sure.

Mike David - **35:25**

Which is really great from a SEO if that's all it takes to get ranking number one, which it's really good actually. So yeah, we just need to swap the. Swap the. Where it actually goes. So it's actually great. Yeah.

Tiffanie | Project Manager - **35:40**

Probably just call it something like a little TC or LTC dashboard, something like that where there's no little tree capital. You know, we'll keep that for the strong domains and be honest, Mike, this is something I'll probably talk to you about, but we might have to just pay a little bit for the Little Tree Capital website to be the first for a financial product for indigenous finance market in general. That could be an August or September thing, but I would love to do that with you so that we're really strong when anyone types investment for indigenous communities or bank councils or any kind of Google search that's related to our company. I'd love for Little Tree Capital. Be right there.

Mike David - **36:22**

Yeah. So when you say remove little tree cap, that would have to be also in the text on the actual pages. Right. Because like it'll scrape the whole thing. Right.

Tiffanie | Project Manager - **36:35**

Well, the easiest way. Well, for sure we'll have a ton of content, but the easiest way will just be to pay for those ads, for those words on Google Ads. And to be honest, they should be fairly inexpensive because they're not very popular, competitive. You know what I mean? It's not like it's a real estate one is like they're a million of them. But this particular. We're still in a. Like you said, it's a new. It's niche. It's. I think it'll be cost effective. I'll do the research on that and propose it to you in like phase two, you know, after this meeting with Colin.

Mike David - **37:10**

Yeah, I, I would just to I guess make it easier so that we're not competing with the dashboard, just.

Tiffanie | Project Manager - **37:17**

Oh yeah.

Mike David - **37:19**

If we don't refer to little Tree capital at all on the dashboard, then we won't have to compete with it, I guess.

Tiffanie | Project Manager - **37:25**

No, no. Yeah. It'll never say little tree capital anymore. And I'll change the domain also. For sure. Yeah, for sure.

Mike David - **37:36**

Okay. As far as the other leads that we had from the event, I imagine we want to start putting finding spots for those in the calendar. Right. Have those initial follow ups.

Tiffanie | Project Manager - **37:52**

Yeah.

Mike David - **37:52**

Which kind of leads back to the CRM.

Tiffanie | Project Manager - **37:57**

So I'm not going to take care of the lead generation part, but I can set up the CRM for Michelle. Michelle. I can also set up an email address for you so that it's coming from a little city capital email. We'll probably do a Google email. Is there anything else you need from me, Michelle? So that you have like that system and you could that becomes kind of like your database of your, your potential clients,.

Michelle Bryant - **38:25**

Tiffany? Honestly, I don't know.

Tiffanie | Project Manager - **38:29**

I've.

Michelle Bryant - **38:29**

I'm going to tell you straight up to the both of you. I've never taken care of the back end. This is, I was always here and I had people doing this and so I've never been in a position to have to take care of all of it. I can definitely work my way through it. So as you build it, Tiffany, there will be some things that I will require support on. And, and I guess this is another piece that we should probably figure out in terms of roles and responsibilities and commitments for the build out of this because it's going to be labor heavy at the top end and a lot of it is yeah, definitely the relationship end and the communication end can handle and inputting that information to the CRM. But the logistics end, I would not rely on me.

Michelle Bryant - **39:36**

I've got way too much happening to be able to manage that as well.

Tiffanie | Project Manager - **39:40**

If, if we had a system where you have a calendly link and it really does follow your calendar and you're diligent with your calendar like when you have your days off or when you have your vacations, like it's blocks in your calendar, would that. Because to me that solves every like logistic problem. Right? Because that person that you are prospecting is clicking on a link to book a meeting with you and then they're reminded the day before with a beautiful email saying hey, don't forget you have a meeting with Michelle tomorrow. And then the link is automatic. There's not really any need for anyone. It's kind of done just by the system. Would that be useful for you? Do you see that as like a solution to what you just mentioned?

Michelle Bryant - **40:21**

Possibly. It would depend on, it would depend on if my work calendar will allow the connection because otherwise that piece becomes manual. Right. So we have restrictions with at work of what outside apps, especially given we just had a major data breach which is working through all weekend. So they don't allow things to come through. I don't think they'll allow the calendly app to.

Tiffanie | Project Manager - **40:51**

I have a solution. Okay, so I, I know what you mean by the way and my mentor, he had, I forget how many businesses knows also that kind of issue. So what we did in his Calendar link was reset blocks. It wasn't to follow his work calendar. It was to follow specific blocks that you set aside in advance. So you know that on like for example, this day you're available one hour, that's that time for that day. Tuesday, it's this hour, Wednesday is this hour. And then that's all someone can book, whether it be the morning or the afternoon. It's not the best in terms of a lot of availabilities, but at least it solves that problem. That would kind of be a bit of a wrench in the wheel, whatever that expression is.

Michelle Bryant - **41:38**

Yeah. And I guess the subsequent question to that is that would work for me. But if we're, Are they just meeting with me? Is it always going to be just with me?

Tiffanie | Project Manager - **41:50**

I think the first initial meetings because Mike is taking on the other role in responsibilities. And you can tell me what you think of this, both of you, but the way that I think were discussing it is like Michelle is responsible for the relationship building part of it. And then if there needs to be like a closing or a pitch, then Mike will be able to participate and be either fly or whatever it is. But for the 12 people that are kind of, hey, we'd like more information. And as we get more and more, I think the initial meeting should be with Michelle exclusively. I don't know if you guys agree.

Michelle Bryant - **42:34**

I'll have to think about that for a bit. Yeah. Not that I disagree with it. I just need to think through it.

Tiffanie | Project Manager - **42:48**

Yeah, maybe. Yeah, maybe. Mike, you can chime in a little bit on what your vision is that I know that you're investing a lot on your end financially as well and everything. And I know that you're taking on this, the rules of the structure and all of that. Did you want to separate again like that from the relationship building part or did you want that to be something that you and Michelle share the same as the cost wise? Well, what were you thinking after all of these meetings that we've had?

Mike David - **43:24**

Yeah, I think, you know, I think we want to leverage Michelle, your existing, you know, relationships and kind of have that be the phase one and then I could engage, you know, everything else. What would be, what would be the best to kind of start off the relationship? I think, I think the conversation with Colin was probably a good example of that. Right. Like it's always going to be a kind of very high level initial talk and then, you know, as we get into it's. It then you know, we can tag in Jared and all of that. I don't think we'll be able to get Jared on every one of those calls for the initial one at least. So that's where I think it's, it kind of makes sense to separate the initial high level and then the follow up as they're interested.

Mike David - **44:35**

That probably makes the most sense.

Tiffanie | Project Manager - **44:40**

Yeah.

Michelle Bryant - **44:42**

And I'm totally fine with parts of that. I just feel that in the beginning we're trying to, we don't have a company. We have nothing right now except intellectual property. And when we're trying to build something, when we're asking for, for trust with funds from first nations who are highly distrustful when it comes to their funds, we need to put a, we need to double down on relationship at the very beginning. Especially if we don't like our first few clients are going to be can we trust them? Even though even just because they're indigenous they don't have a structure built like that's where I get nervous. Right. And that's where I feel the double down on the relationship part to get those commitments are going to be really key.

Mike David - **45:38**

Yeah, yeah, definitely. We, we want the right things in place and that's what we'll, we'll be building towards. And I think, you know, by the time we meet with Colin again, you know the website and things like that will be in place. So yeah, those things will are, will be falling into place for sure. As.

Tiffanie | Project Manager - **46:14**

Yeah, sorry, I didn't mean, I didn't, I so didn't mean to cut you off by the way. I just, I'm taking notes as you both are speaking. So I think what Michelle is saying is this, the company should be formed before she starts really talking a lot about little tree capital. And I think what Mike is saying is yes, but he kind of wants to see those commitments before investing those funds. So is there a way that we could meet in the middle of there and have those commitments in page?

Michelle Bryant - **46:47**

I'm not saying that we should form the company. I'm saying that we need to double down on getting those commitments before forming the company. Because the trust won't be there. They're not going, I mean they're not handing money over until we have something built. But getting even a letter of commitment from them to support us is going to be really difficult without having a company in place. And so I'm not saying it's not going to be impossible. And I'm not saying that we should have the company in place first. I'm saying that we're going to need to be very careful in the relationship.

Mike David - **47:23**

Yeah, well, I don't think it's. If we're talking about strictly company, that's probably a small part of it that can happen fairly quickly and we should do that to your point. That way there's an existing something probably for a corporation, it's probably 2500 bucks if I would just, you know, so we could, we could do that for sure. And I think I was thinking more of. In order to engage Norton Rose fully and have the 6% product, that's when, you know, the 250K kind of kicks in. So yeah, maybe just setting up the structure initially would be, would.

Tiffanie | Project Manager - **48:15**

Be.

Mike David - **48:15**

Exactly to your point. And I, and I agree. Like that's, that can happen fairly quickly and that at least we'll have a presence in the ether. So yeah, we can do that. Would you, would you like me to be on those initial calls?

Michelle Bryant - **48:41**

Well, with the people that I'd be reaching out to, they would be. I'd already have the relationship with them, so that part is fine. But the, anything that needs to have more the initial calls. So this is how I see it happening for the people that I already have connection with. It's basically an email from me saying. And followed up by a call or reverse or what have you. Here's the information. We'd like to have an opportunity to present to you.

Tiffanie | Project Manager - **49:16**

Whatever language.

Michelle Bryant - **49:18**

So that could be done just by me with my initial contacts that we identified that I have a fairly strong relationship with. Following that there would need to be a Mike and Jared presence in that conversation. And in terms of the, And like the piece of information that I want to know when I'm having those conversations is what do we, what this is where Jarrett comes. Information from. Jarrett comes in. I need to know in detail what I can actually say about the product in those conversations. And I need to know what that letter of commitment looks like.

Mike David - **50:09**

Yeah yeah.

Michelle Bryant - **50:17**

Like what form does it have to take? So if they say yes, we're ready to work with you and, and put a portion of our funds with you. What do we need? And so we're not like, oh, like we're just creating that. Let me, let me get back to you in three weeks. That's not going to fly and that's not how I like to work. So I need to have everything in place before I even make contact with somebody.

Mike David - **50:45**

Okay. Yeah. It's just really finding the sequencing and then not dragging it out. Bringing in the right resource at the right time. So are we just talking about that kind of qualified initial qualifying?

Michelle Bryant - **51:03**

Yeah.

Mike David - **51:03**

Where it's email bringing them to the table. I think it's really just when to use kind of Jared and the full kind of pitch. I think that's where it's not so clear to me. And it really depends probably on every relationship. Right. May be different.

Michelle Bryant - **51:29**

It would definitely, it would definitely depend. And so those initial conversations would be the people who can facilitate the decision maker bringing the decision makers to the table. Once the decision makers are at the table, that's when Jared needs to come in.

Mike David - **51:43**

Yeah.

Michelle Bryant - **51:44**

Because we can't do that on our own. And, and that's, this is where I, this is why I need to know exactly what I can say before that decision maker table convenes.

Mike David - **51:56**

Yeah. Okay. So we can.

Michelle Bryant - **52:00**

I, I don't want to work around something that, I mean if it's people I know, I'm gonna say it anyway. I could care less. They're not gonna, they're not going to call the regular regulators on me.

Mike David - **52:13**

The popo. Yeah, I gotta call the popo.

Michelle Bryant - **52:16**

Yeah.

Mike David - **52:17**

Yeah. Okay. So, so we can get that super clear from Jared. What exactly does that initial reach out look like? I think you know, I would need your help in I guess just making sure that the qualified or decision makers get to that stage and then that's where, that's where all hands on deck will bring it to the next level. So. Yeah. 100 Agree. Yeah.

Michelle Bryant - **52:48**

Yeah.

Mike David - **52:50**

Cool.

Tiffanie | Project Manager - **52:51**

Just.

Michelle Bryant - **52:52**

Yeah. Logistically, like obviously the calendar is there but in terms of Mike, is Leah able to support in the setup of those meetings?

Mike David - **53:07**

So we have updated her so she is now kind of more taking on a fractional EA role with me, my sister, my brother in law and my CEO. So she's kind of, we recently kind of spread her out in that capacity. So.

Tiffanie | Project Manager - **53:31**

No, I would suggest since there's not a lot of meetings, maybe we can try with Calendly, see if that becomes overwhelming. Michelle, if it does become overwhelming, definitely I can try and help out. I do have a lot of objectives and goals that Mike has put me on for the next couple of months that I do have to give a lot of time to. But if you're like, look, I'm overwhelmed, there's too many meetings, I need help That's a beautiful problem to have. And then I'm sure I could step in and put some other things to the side and then help with the coordination. I do like to think that often systems solve these problems. So I would love to give the calendly a try. And then if ever it gets to the point where it's like this is not working, I'm overwhelmed.

Tiffanie | Project Manager - **54:14**

Then yeah, we're a team. We'll figure it out. We'll figure it out.

Mike David - **54:18**

Essentially. Yeah. I just want to be mindful to not over commit Leia, especially with this new kind of agreement that we have. So of course, you know, all the resources are available but let's try to find the, the most efficient way I guess to do that.

Tiffanie | Project Manager - **54:38**

So.

Mike David - **54:38**

Yeah, 100.

Michelle Bryant - **54:41**

Yeah. Because. And the reason I'm asking is because I'd like to have. And maybe it's just creating an inbox that can always be copied. So maybe Tiffany, as the project manager you have all the threads. I, I don't look at my emails every day throughout the day and so I don't want things to get lost. I just don't have that capacity to be honest with my job. So.

Mike David - **55:20**

Okay, yeah, we're, we'll have to just kind of work with what we have and figure out the best way forward. But I think yeah, things tools like calendly kind of solve. Solve for at least a few of the things that were the logistical getting everybody to the table.

Michelle Bryant - **55:52**

So the solves for. Solves for the. For. For one piece. But the back and forth emails that tend to happen in these things doesn't solve that piece. And so that's why I'm saying like if we had an. An email that could always, that I could always copy that. It's not just relying on me looking at it.

Mike David - **56:16**

Right.

Tiffanie | Project Manager - **56:19**

It's interesting. We might want to talk about Jeff's involvement too. If, if Michelle, you're really busy and the relationship management part ends up being too much to take on, maybe JS could help with some of those or maybe someone else. You know, I could set up email reminders where if like it's not open, you get a reminder to another email. Hey, you have an email to capital that hasn't been seen. We can, you can tell me basically what works for you, what doesn't work for you. We can try and solve it with a system rather than a person. And then if it gets to the point where you meet a person then you know, we can come back to the drawing board and Figure that out. And how does that sound?

Michelle Bryant - **57:01**

Yeah, I'm definitely open to systems. I love when systems can take care of things that I don't need to take care of.

Tiffanie | Project Manager - **57:09**

One more question before because Mike and I have to jump into another meeting, but I wanted to know, Mike, you have a meeting with Eric this week. What Michelle just said about forming the. Just the company, the numbered company. Do you want me to put together a joint venture agreement like we've done for the other companies? You're starting on Wednesday and then Eric could also take that on. So to that point I have the structure right in front of me. You'll just have to let me know what you decided. Which one am I asking him to do? Am I asking him to do the reserve LP or the reserve gp? And which one is the one that you want to open first? I understand the rest is for the fund, which is totally fine.

Tiffanie | Project Manager - **57:50**

But it has to be one of these that is opened.

Mike David - **57:57**

Great question. My understanding of all of this structure stuff would bet would be that it would be the gp.

Tiffanie | Project Manager - **58:05**

Perfect.

Michelle Bryant - **58:07**

Yeah. There's a little thing down below like the square is the corporation registered entity. Right. And a limited partnership. So that's the reserve lp.

Tiffanie | Project Manager - **58:19**

But did you decide whether you wanted a corporation under the tax laws because it will be taxable income or did you want it as a limited partnership? Do you remember what your decision was in the end for that?

Mike David - **58:36**

Well, I think, yeah, I believe we chose to take the Norton Rose route. Whatever they architected. I know going with Eric's resources would have taken us a little off that path. So we decided to just go with what Norton Rose said.

Tiffanie | Project Manager - **58:57**

So it'll be a corporation and to Mike's point, that's very easy to open. It'll be about $5,000 with Eric and it could be opened within a matter of weeks. So Michelle, you would have that peace of mind knowing that the company is opened. Like Mike said. The actual note part, that when they start investing, that will be at a later date, but at least you'll have the company formed. It'll have a registered number. People could look it up. They'll be registered to you and to Mike. So. So it'll be very clean and professional. Yeah. Okay, so I'll put that on my to dos then for Wednesday. We're going to give Eric a lot of things to do. A lot of things to do. Have, have you met him yet by the way, Michelle? Eric, the accountant, sorry, the lawyer. That's a tax lawyer. He's.

Tiffanie | Project Manager - **59:44**

He's really great and he's been very helpful. So you can now count him as part of your A team of this structure, which is cool. Okay, so I have my to dos. Is there anything else you wanted to talk about in this meeting before our next meeting in two weeks?

Mike David - **01:00:07**

I'm good.

Michelle Bryant - **01:00:08**

Yeah, I'm good.

Mike David - **01:00:10**

Yeah. Definitely some good things to work on and to get in place. Still looking forward to next steps.

Tiffanie | Project Manager - **01:00:18**

Beautiful. So then, Mike, if you want to stay on this link and Michelle, hope you have an amazing week ahead. I'll definitely work on anything that you send over. Whatever you have time to send it over, let me know and then when I'm finished kind of coming up with the research, depending on what Colin answers to you. If you want we can jump on a meeting and I can just show you or I can just put it straight up to the website and you can take a look at that and make edits. However much your bandwidth is in your time, let me know. And I'm available in either way, either by meeting or by email. And yeah, I'll get to work. All right, have a great week.

Michelle Bryant - **01:00:57**

Okay, bye.

Mike David - **01:00:59**

Bye.

Tiffanie | Project Manager - **01:01:03**

I'll just. I think I'll end this meeting just so that our Tiffanie for this meeting stays, if that's okay.

Michelle Bryant - **01:01:10**

Yeah, okay.

Tiffanie | Project Manager - **01:01:11**

I'll see you on the same link in a couple seconds.

Mike David - **01:01:13**

Yeah, I'm just going to run into the building really quick. I'll be two to five minutes.

Tiffanie | Project Manager - **01:01:19**

No problem. Okay, bye.