Referenced answer — valuing a minority holding

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3 passages, 3 versions, 1 archived named before citation · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. The firm, its clients, its documents and its figures were invented; they illustrate a situation common in management consultancy and describe no real client. **An archived version is named as archived BEFORE being cited, never after.** That is this agent's central rule: it avoids the costliest failure on large holdings — citing in good faith a method that no longer applies.

Question asked: which method applies to valuing a minority holding, on an engagement opened this month?

The three documents that carry the answer

Document	Version	Effective from	Status	Passage cited

MET-07 · methodology handbook	**v4**	**12/01/2026**	**In force — carries authority**	**p. 9, § 4.2 — “the illiquidity discount applied shall fall between 15% and 25%, and its level shall be justified on file by at least two comparables dated within the last eighteen months”**
NI-2025-11 · interpretation note	v2	04/11/2025	In force — completes it	p. 3 — dating a comparable whose transaction straddles two financial years
MET-07 · engagement files	v3	07/03/2023	**ARCHIVED on 12/01/2026**	**p. 8 — range of 10% to 30%, no longer the firm's rule**

The two texts in force agree: the interpretation note refines the method, it does not contradict it. **The archived version appears in 61 engagement files and will not be removed from them** — a 2025 deliverable must keep the method under which it was issued.

The time shifted on this request

Step	By hand	With the agent	Share of the request's time
Finding the documents concerned	15 minutes	**2 minutes**	**60% → 8%**
Checking which one applies	8 minutes 45	**1 minute 15**	**35% → 5%**
Drafting the answer to the client	Unchanged	Unchanged	**That is the consultant's craft**

What the consultant walks away with: three references openable at the line, the range in force, and the reason a 2025 file shows a different one. **None of the three**

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was paraphrased: they are extracts.

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