

Referral Partnership Program

Help more clients qualify. Earn 20% commission on every referral that closes.



Built for professionals who already have trusted client relationships



Great fit for real estate agents, tax advisors, mortgage professionals, and other service providers



We help clients improve their credit profile and access business funding



YOU

Refer a client



WE HELP

Improve credit and access funding



YOUR CLIENT

Gets approved and moves forward



YOU EARN

20% COMMISSION



YOUR CLIENT

GAINS OPPORTUNITY

More approvals. More closed deals. More revenue.

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The Problem You're **Already** Seeing

Good clients often get stuck because of credit issues or lack of access to funding.



Qualified prospects fall through because their credit profile isn't strong enough



Some clients need access to capital before they can move forward



That leads to lost revenue, delayed deals, and missed opportunities



We help solve the gap so you can close more deals.

More approvals. More closed deals. More revenue.

How The Partnership Works

A simple 4-step process that creates value for everyone involved.



You stay focused on your core business. We handle the heavy lifting.

More approvals. More closed deals. More revenue.



Why Partners Win

This partnership creates more revenue, more approvals, and better client outcomes.



Earn 20% Commissions

Get paid on every referral that closes.



Close More Core Deals

Help clients become eligible for the services you already offer.



Add A New Revenue Stream

Monetize referrals without adding fulfillment work to your plate.



Deliver More Value

Give clients a solution instead of losing them when credit is the issue.

Better for you. Better for your clients. Better for your business.

Industry Example: Real Estate Agent

Turn credit-challenged buyers or investors into future closings and referral income.



A buyer or investor wants to move forward but has weak credit or limited access to capital



We help improve their credit profile and/or secure funding



You keep the relationship and increase your chances of closing the deal later

Example



Client enrolls in a \$5,000 program



Your 20% commission = \$1,000



2 closed referrals per month = \$2,000/month

Industry Example: Tax Advisor

Help more business-owner clients while creating referral revenue on the side.



Many clients need better credit or funding to stabilize cash flow, expand, or qualify for financing



Referring them deepens trust and gives them a path forward



You create new revenue without adding extra fulfillment work

Example



3 clients close at **\$4,000 each**



Total closed revenue = **\$12,000**



Your 20% commission = **\$2,400**

Illustrative example for presentation purposes.

Simple Revenue Scenarios

Examples based on a 20% referral commission.



Industry	Closed Referrals / Month	Example Monthly Commission
 Real Estate Agent	2 x \$5,000	\$2,000
 Tax Advisor	3 x \$4,000	\$2,400
 Mortgage Professional	2 x \$4,000	\$1,600
 Business Coach	4 x \$3,000	\$2,400



**Turn your
relationships into
recurring income.**



More approvals. More closed deals. More revenue.

Next Steps

A simple partnership model that creates two wins at the same time.



01

Identify clients who need credit or funding help



02

Make the referral or introduction



03

We handle the strategy, review, and onboarding



04

You get paid when the referral closes



**One partnership creates
two wins:**

more income for you and better
outcomes for your clients.

Let's build a referral pipeline together.