COMMERCIAL FINANCE LAUNCH PROGRAMME · BUILD INTRODUCER PARTNERSHIPS

Introducer partnership kit

A target-introducer list template, a one-page how-we-work-together leave-behind, and a referral-handling note that flags fee disclosure for sign-off.

01 Your target-introducer list

The best introducers serve your niche and sit near its finance trigger events.

Accountants and IFAs whose clients hit the finance triggers you serve.

Solicitors and other brokers who meet businesses at the same moments.

How you know each one, or the warmest route to an introduction.

02 Your how-we-work-together one-pager

A referral flows when the introducer can see what you do and what their client gains.

What you do, who you help, and how a referral reaches you.

How you keep the introducer informed and make referring effortless.

03 Your referral-handling note

Any referral fee or commission-share carries a disclosure obligation. The wording is not yours to draft; route it to your compliance for sign-off.

How any referral fee or commission-share works, flagged for compliance sign-off.

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Want a website that makes you the easy broker to refer to?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

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