FINANCIAL ADVISORY LAUNCH PROGRAMME · BUILD REFERRAL PARTNERSHIPS WITH ACCOUNTANTS AND SOLICITORS

Referral-partner outreach kit

A target-list template, a value-proposition one-pager, and a follow-up cadence.

01 Build your target list

The best partners share your clients and the trigger events that create advice needs.

Local accountants whose business owners and retiring clients match your niche.

Local solicitors handling business sales, probate, family and later-life matters.

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

02 Your value proposition

A referral flows when the partner can see what is in it for their clients and for them.

The one line: you help their clients with the things they do not do.

What their clients gain, and how you keep the partner informed within compliance and data rules.

03 Follow-up cadence

One introduction is not a partnership. Set a rhythm and keep it.

How, and how often, you will stay in touch with each partner.

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Talk to us

How you thank a partner for a referral, and tell them how it went.

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