

PARTNER REFERENCE

When to think of us

You do not need to explain what we do. You just need to notice the moment.

These are the situations where an introduction tends to matter most. If one of your clients looks like any of the following, that is the moment.

They just sold, or they are 12 to 24 months out.

A liquidity event is the highest-stakes moment in an entrepreneur's financial life, and most people arrive at it with no plan built in advance.

The tax bill makes them angry every year.

And when they ask about it, the answer they get is some version of "that is just what you owe."

Their advisors have never spoken to each other.

A CPA, an attorney, an insurance person and someone managing investments. Four professionals, zero coordination.

Almost everything they own is the business.

Real value, real income, and nothing meaningful arriving when they stop working.

They have outgrown their advisor but are not big enough for a family office.

A real single family office costs \$1M to \$3M a year to run. There is a gap in the middle and they are standing in it.

Someone is selling them something complicated.

Oil and gas, film, equipment leasing, a fund with a good deck. They have nobody independent to ask.

The structure grew by accident.

Entities added one at a time over a decade, estate documents written before two of the kids were born.

IF ANY OF THESE SOUND LIKE SOMEONE YOU KNOW

Use the intro templates in your partner portal. Four sentences, already written, ready to paste. You do not have to compose anything.

Who is not a fit

Being honest about this protects your relationship and saves everyone time.

- Someone shopping on price for investment management
- Someone who wants stock picks or trading ideas
- A W-2 earner with a straightforward situation
- Anyone who wants a product sold to them rather than a plan built with them

IF YOU ARE NOT SURE

Send them anyway, or just call us. We would rather have a conversation and tell you it is not a fit than have you sit on someone we could have helped.

What to say

You do not need a script. If you want one, this works.

“You should talk to my guys at Fractional Family Office. They do the coordinating part that nobody is doing for you right now.”

That is enough. We will take it from there.

REMINDER

Whenever you recommend us, let the person know you may be paid if they become a client. The intro templates in your partner portal already include that line.