

PARTNER PROGRAM

For the professionals our clients already trust.

One introduction is the whole ask. We take it from there.

Why professionals partner with us

Your client gets the thing nobody is currently providing

Coordination across tax, structure, protection and investments, run as one plan instead of four opinions.

You stay in the relationship

We work alongside the professionals a client already has. We are not looking to replace you, and we will say so to your client.

The ask is small

You make an introduction. You do not have to explain what we do, prepare anything, or sell.

You are compensated

When a referral becomes a client, you are paid. The rate, timing and duration are set out in your partner agreement.

WHAT THIS IS NOT

Not a lead-generation arrangement, and not a commitment to send us anything. You introduce someone when it makes sense, and only when it makes sense. There is no quota and no pressure.

How it works

1

APPLY

A short application. A few minutes, not a form you need to set aside time for.

2

REVIEW

We look at it and come back to you quickly.

3

AGREEMENT

You e-sign the partner agreement and compensation disclosure, then provide your tax and payment details.

4

ACTIVATE

You get your partner portal, your personal referral link, and the materials you need.

5

REFER AND GET PAID

Introduce someone. We handle the rest. Commissions are calculated when a referral becomes a client and paid on the schedule in your agreement.

WHAT YOU GET

- A partner portal with your personal referral link
- Intro templates you can copy and send
- A one-page overview you can hand to a client
- A reference sheet on who is and is not a fit
- A named contact at FFO

WHAT WE ASK

- Only introduce people you believe we can genuinely help
- Let them know you may be compensated. Our templates include the line
- Use the materials we provide rather than writing your own
- Tell us if the person already knows us

Questions before you apply? Talk to Antonio or Landon directly.

Questions we get asked

How and when am I paid?

Commissions are calculated when a referred client comes on board and paid on a regular monthly run. The rate, the timing and how long it runs are set out in your partner agreement.

What if the person already knows FFO?

Tell us up front. We will look at it honestly and let you know where it stands before anyone assumes anything.

Do I have to sell anything?

No. An introduction is enough. We would rather you say “you should talk to them” than try to explain what we do.

I am a CPA or an attorney. Does that change anything?

It can. Some professions have their own rules about referral fees depending on the work you do for that client. Tell us on the application and we will work it out with you before you are activated.

What happens to the relationship?

It stays yours. We coordinate with the professionals a client already has, and we will tell your client directly that we are not replacing you.

READY TO START

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DISCLOSURE

Compensation terms are set out in your partner agreement and are not stated in this document, so that this material stays accurate if those terms change.

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