



**Business Exit
Solutions**

Valuable. Scalable. Transferable.

Accountant Partnership Kit

**Helping Accountants
Strengthen Client
Value - and Their Own**

Why Partner with Business Exit Solutions?

With over **420,000 Baby Boomer-owned businesses** in Australia preparing to exit in the next 5-10 years, Accountants have a unique opportunity to support their clients through this transition.

For many of your clients, their business is their biggest financial asset. But most are not prepared for a successful exit:

- **80%** of businesses never sell.
- **85%** of owners regret their exit within 12 months.
- **50%** of exits are forced by the "5 D's": Death, Disability, Divorce, Disagreement, Distress.

As their accountant, you already see the warning signs: messy financials, poor records, low profitability, or over-reliance on the owner. These issues reduce valuations and make businesses harder to sell.

By partnering with Business Exit Solutions, you can help clients prepare, protect their wealth, and strengthen your role as their trusted advisor.

Our proven **EXITmax System** increases value, reduces risks, and makes businesses more attractive to buyers - while creating new opportunities for your practice.



Three Partnership Options for Accountants

Choose the pathway that fits your firm:

1. Casual Referrer (Simple, No Commitment)

- Free to join.
- Refer clients when you see the need.
- BES delivers everything directly.

👉 Best for accountants who want a light-touch way to help clients without extra involvement.

2. Advisory Partner (Referral + Co-Brand)

- Access **co-branded tools** (checklists, guides, newsletters) to start conversations with confidence.
- BES delivers all exit readiness reports and programs.
- **Earn 20% commission** on client enrolments.
- Quarterly CPD webinars + fresh resources included.
- Membership Fee: \$297/month (\$2970/year).

👉 Best for accountants who want to consistently offer exit planning as part of their service, while BES does the delivery.

3. White Label Partner (Premium Licensing)

- Deliver exit planning **under your own brand**.
- A dedicated client portal, pre-loaded with all BES programs.
- You set program pricing
- You bill clients directly and **keep 100% of the revenue**.
- Includes CPD training for your team (3–6 hours annually).
- Ongoing updates + quarterly strategy calls with BES.
- Fees: \$797/month or \$7,970/year + \$2,500 setup.
- Still earn **25% commission** if you refer clients back to BES.

👉 Best for firms ready to expand into premium advisory services and take full ownership of delivery.

ROI:

Advisory Partners typically break even with only ~6 referrals per year, while **White Label Partners** cover their license with just 2–4 clients. We'll walk through examples during your partnership call.

How This Partnership Helps Accountants

- ✓ **Increase Client Value** – Help clients prepare their businesses for a profitable exit.
 - ✓ **Differentiate Your Firm** – Stand out from compliance-only firms with proactive advisory services.
 - ✓ **Strengthen Retention** – Be at the centre of your clients' most important financial decisions.
 - ✓ **Create New Revenue** – Earn referral commissions or bill directly with White Label.
 - ✓ **Stay Equipped** – Access co-branded tools, CPD training, and ongoing support.
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When to Introduce BES to Your Clients

- ✦ When they talk about retirement or succession but have no plan.
 - ✦ If their business is heavily reliant on them personally.
 - ✦ When their records or financials aren't buyer-ready.
 - ✦ To maximise valuation before listing or sale.
 - ✦ To protect against unplanned exits caused by the "5 D's."
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How We Help Your Clients Exit Successfully

Our **EXITmax System** provides Accountants with a structured framework to help clients increase business value, prepare for sale, and reduce financial risk.

We work with your clients to:

- ✓ Identify and fix operational inefficiencies that lower valuation multipliers.
- ✓ Reduce business dependence on the owner.
- ✓ Improve operational readiness to attract serious buyers.
- ✓ Implement strategies that increase turnover and valuation multiple
- ✓ Ensure businesses are scalable and transferable before sale or succession.

By integrating exit planning into your accounting services, you provide higher-value advisory services and increase client retention.

EXITmax System

Helping Business Owners to successfully exit their business
Making Businesses Valuable. Scalable. Sellable. Transferable.



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EXITmax Programs to Help Clients Exit on Their Terms

Client Challenge	Financial Risk	Recommended Program
No clear exit strategy	Unplanned exits risk low sale prices and missed wealth opportunities	Exit Plan SME – Creates a structured, outcome-based plan aligned to financial goals
Business depends too heavily on owner	Business is unattractive to buyers due to dependency	Small or Medium Business Exit Readiness – Builds owner independence and improves scalability
Operational inefficiencies	Lower profitability and reduced valuation multiple	Small or Medium Business Exit Readiness – Enhances performance and boosts value
Poor financials or disorganized records	Loss of buyer confidence and delayed or failed deals	Small or Medium Business Exit Readiness – Helps clean up and present strong financials pre-sale
Plateaued business growth	Lower revenue = lower valuation potential	Small or Medium Business Exit Readiness – Drives profit, growth, and market readiness
Nearing exit without final prep	Missed final value drivers, rushed handover	Ready-to-Exit Program – Supports a clean and confident 3-6 month transition

Partner Guarantee & Cancellation Policy

We believe in keeping partnerships straightforward and fair.

Advisory Partners – Cancel anytime with 30 days' notice. No lock-in contracts. Annual memberships are discounted but non-refundable. New partners: 30-day money-back guarantee on your first month.

White Label Partners – Setup fee is non-refundable. Minimum 3-month term applies. After 3 months, cancel anytime with 30 days' notice.


Casual Referrers – Free to join. No commitments.

Next Steps: Let's Partner

 **Book a Partnership Call** – Explore which pathway fits your firm.

 **Download Your Accountant Toolkit** – Checklists, conversation starters, and resources.

 **Start Referring or Delivering Exit Planning Today** – Add value for your clients and grow your practice.

 Call: +61-440 136 616

 Email: partner@businessexit.global

 Visit: <https://businessexit.global/strategic-partnerships/>

Why Accountants Choose BES

- ✓ Increase client valuations and improve sale outcomes.
- ✓ Build stronger long-term client relationships.
- ✓ Create new advisory revenue streams.
- ✓ Access CPD training, tools, and partner support.

Help your clients exit stronger – and grow your firm with Business Exit Solutions.



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Your Roadmap to Supporting Clients' Business Exits

At Business Exit Solutions, we collaborate with accountants, business brokers, and financial planners to:

- Prepare your clients' businesses for sale, succession, or retirement.
- Maximise business value and ensure smooth, seamless transitions.
- Deliver proven EXITmax programs to guide clients through every step of the exit process.
- Strengthen your client relationships by sending them back to you for their ongoing accounting or financial needs.

Partner with us to enhance your services, deliver exceptional value, and empower your clients to achieve successful business exits—all while keeping you at the center of their trusted advisory team.



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