Business Exit Solutions

Valuable. Scalable. Transferable.

Financial Advisor Partnership Kit

Helping Clients Protect Their Biggest Asset - While Growing Yours

Why Partner with Business Exit Solutions?

Right now, over **420,000 Baby Boomer business owners** in Australia, are preparing to exit their business. But many lack a structured exit plan, putting their wealth and retirement security at risk.

This is a massive opportunity for financial advisors to position themselves as trusted guides, helping business owners transition their wealth and plan for life after business ownership.

For many business owners, their company is their largest asset, and the foundation of their retirement. 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.

This is where financial planners can make the biggest difference. By introducing exit planning, you:

- Align business exits with retirement and wealth strategies.
- Secure more assets under management.
- Build deeper trust at your client's most critical transition.

Our proven **EXITmax System** prepares businesses to be valuable, scalable, and transferable. Giving you a clear pathway to strengthen your role as a trusted advisor.

Three Partnership Options for Financial Advisors

Choose the pathway that best fits your firm:

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1. Casual Referrer (Simple, No Commitment)

- Free to join.
- Introduce us when you see the need.
- BES delivers everything directly.

👉 Best for advisors who want a low-effort way to add value for clients.

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2. Advisory Partner (Referral + Co-Brand)

- Use **co-branded resources** - checklists, conversation tools, newsletter inserts.
- BES delivers all reports and programs.
- **Earn 20% commission** on client enrolments.
- Quarterly CPD webinars + fresh content each quarter.
- Membership Fee: $297/month ($2,970/year).

👉 Best for planners who want to consistently raise exit planning with clients, while BES handles the delivery.

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3. White Label Partner *(Premium Licensing)*

- Deliver exit planning directly **under your own brand**.
- Dedicated client portal branded for your firm, pre-loaded with all BES programs.
- You determine program price
- You bill your clients directly and **keep 100% of the revenue**.
- Includes CPD training for your team (3–6 hours annually).
- Ongoing updates + quarterly strategy calls.
- 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 own exit planning as a premium advisory service line.

ROI:

Most financial advisors and planners cover their membership with just ~6 referrals per year as an Advisory Partner, or 2-4 clients per year as a White Label Partner.
We'll show you exactly how the numbers stack up on your partnership call.

How This Partnership Helps Your Firm

✅ **Secure Client Wealth** - Align business exits with retirement and estate strategies.
✅ **Unlock More AUM** - Better exits = more assets for you to manage.
✅ **Deepen Client Trust** - Guide clients through their biggest financial event.
✅ **Expand Services** - Add exit planning without building a program yourself.
✅ **Stay Equipped** - Ongoing CPD, tools, and support included.

When to Introduce BES to Your Clients

📌 During retirement planning conversations - when the business is key to funding.
📌 When they talk about succession but don't have a clear plan.
📌 If the business is heavily dependent on them personally.
📌 When financials or operations are not buyer-ready.
📌 To protect against unplanned exits triggered by the "5 D's."

Partner Guarantee & Cancellation Policy

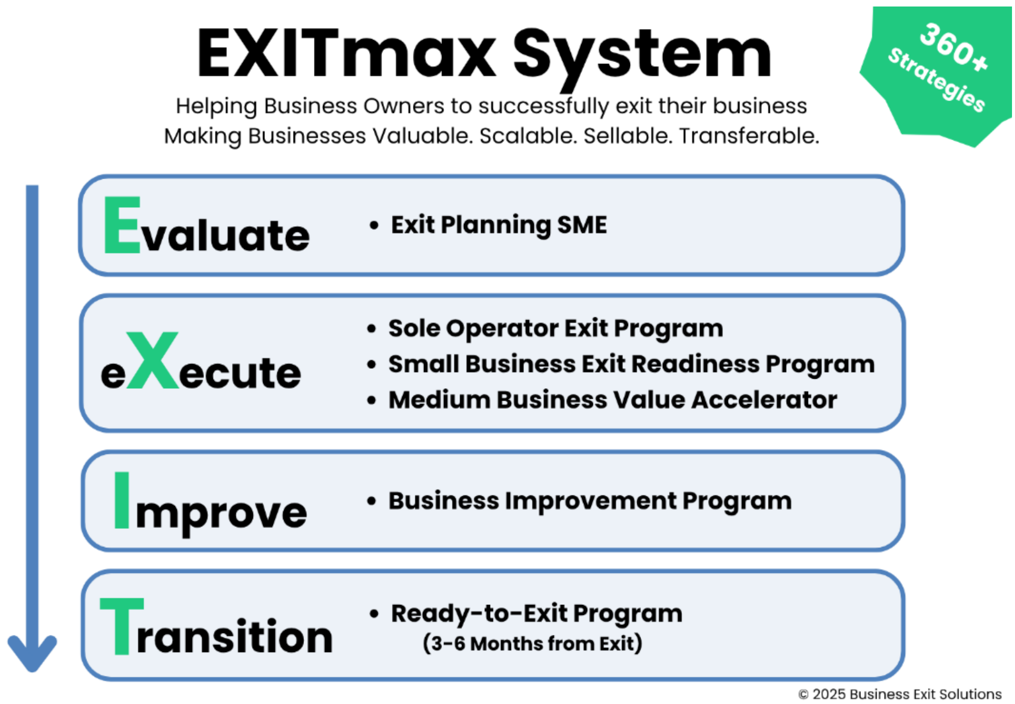
We believe in making partnerships simple and risk-free.
Advisory Partners – Cancel anytime with 30 days' notice. No lock-in contracts. Annual memberships are discounted but non-refundable once paid. New partners: 30-day money-back guarantee on your first month if it's not the right fit.
White Label Partners – Setup fee is non-refundable. Minimum 3-month commitment applies. After that, cancel anytime with 30 days' notice.
Casual Referrers – Always free, no contracts, no commitments.

How We Help Your Clients Exit Successfully

Our **EXITmax System** provides a structured framework to help clients increase business value, prepare for sale and maximise their exit strategy.

We work with your clients to:
✓ Optimize business value before selling to increase retirement savings.
✓ Identify and fix operational inefficiencies that lower valuation multipliers.
✓ Align their business exit with personal wealth strategies.
✓ 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.
✓ Reduce risks of unexpected forced exits, protect their current wealth.

By integrating exit planning into your financial services, you build deeper trust, higher retention, and more long-term wealth under management.



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
Business is solely reliant on the owner	Unsaleable without major changes or handover strategy	**Sole Operator Exit Program** – Tools to prepare for handover or wind-down. Includes DIY sale templates and buyer readiness prep.

Next Steps - Let's Partner

📅 **[Book a Partnership Call](#)** - Explore which option fits your practice.
📥 **Download Your Financial Advisor Toolkit** - Conversation Starters, Checklists, and client resources.
🚀 **Start Referring or Delivering Exit Planning Today** - Secure your clients' wealth while growing your own business.

🌐 Visit: https://businessexit.global/strategic-partnerships/

Why Financial Planners Choose Business Exit Solutions

✓ Protect and grow client wealth through better exits.
✓ Differentiate your practice with proactive planning.
✓ Earn new revenue streams through referral commissions or service fees.
✓ Access CPD, tools, and resources to position yourself as a leader in client transition planning.
Help your clients exit smart and retire wealthy, with BES by your side.

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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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Scan Here to Book a Free Consultation