



**Business Exit
Solutions**

Valuable. Scalable. Transferable.

SMSF Advisor Partnership Kit

**Helping SMSF Advisors
Expand Their Services
and Grow Their Impact**

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 **retirement wealth and SMSF balances** at risk.

This is a massive opportunity for **SMSF advisors** to position themselves as trusted guides, helping business owners transition their wealth and safeguard their superannuation for retirement.

For many business owners, their company is their largest asset, and the foundation of their SMSF. But most are not prepared for a successful exit:

- ✓ **80% of businesses never sell.**
- ✓ Even those that do sell, **85% of owners regret it within 12 months.**
- ✓ 50% of exits are forced by the '5D's': Death, Disability, Divorce, Disagreement, Distress.

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

- Align business exits with SMSF and retirement strategies.
- Secure more retirement wealth inside SMSFs.
- Build deeper trust at your client's most critical financial 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 SMSF Advisor.

Three Partnership Options for SMSF Advisors

Choose the pathway that fits your practice:

1. Casual Referrer (Simple, No Commitment)

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

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

2. Advisory Partner (Referral + Co-Brand)

- Access **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 (or ~\$2,970/year).

👉 Best for SMSF advisors who want to consistently raise business exit planning with clients, while BES handles delivery.

3. White Label Partner (Premium Licensing)

- Deliver exit planning directly **under your own brand**.
- Dedicated client portal, pre-loaded with BES programs.
- You determine program pricing.
- 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 practices ready to own exit planning as a premium service line.

ROI: Most SMSF advisors cover their partnership fee quickly:

- Advisory Partner: - 6 referrals per year.
- White Label Partners: 2-4 clients annually.

We'll walk through the numbers on your partnership call.

How This Partnership Helps Your SMSF Practice

- ✓ **Secure Client Wealth** – Align business exits with SMSF retirement strategies.
- ✓ **Grow SMSF Balances** – Successful exits = more assets under your management.
- ✓ **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 SMSF and retirement planning conversations – when the business is key to funding.
- When they start talking about retirement, succession, or “what’s next.”
- If the business is heavily dependent on the owner personally.
- When financials or operations are not buyer-ready.
- To protect against unplanned exits triggered by the “5 D’s.”

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 SMSF strategy.

We work with your clients to:

- Optimise business value before selling to increase retirement savings inside their SMSF.
- Identify and fix operational inefficiencies that lower valuation multipliers.
- Align their business exit with personal wealth and super strategies.
- Reduce business dependence on the owner.
- Improve operational readiness to attract serious buyers.

EXITmax System

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

360+
Strategies



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- Ensure businesses are scalable and transferable before sale or succession.
- Reduce risks of unexpected forced exits, protecting SMSF balances.

By integrating exit planning into your SMSF advisory services, you build deeper trust, higher retention, and stronger client outcomes.

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 retirement wealth	Exit Plan SME – Creates a structured, outcome-based plan aligned to SMSF and retirement 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 disorganised 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 value drivers, rushed handover	Ready-to-Exit Program – Supports a clean and confident 3–6 month transition
Business 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

Partnership Guarantee & Cancellation Policy

We believe in keeping 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.
- **White Label Partners** – Setup fee is non-refundable. Minimum 3-month term applies. After that, cancel anytime with 30 days' notice.
- **Casual Referrers** – Always free. No contracts, no commitments.

Next Steps: Let's Partner

The Baby Boomer business exit wave **is here**.

Are you ready to **help your clients—and grow your own practice?**



[Book a Partnership Call](#) – Explore which model suits your advisory practice.



Learn more at: <https://businessexit.global/strategic-partnerships/>



Download Your Advisor Toolkit – Conversation starters, checklists, and resources.



Start Referring or Delivering Exit Planning Today – Grow your advisory services and help clients exit stronger.



Email: partner@businessexit.global



Visit: businessexit.global/strategic-partnerships

Why SMSF Advisors Choose Business Exit Solutions

- ✓ Protect and grow client SMSF balances through better exits.
- ✓ Differentiate your practice with proactive planning.
- ✓ Earn new revenue through referral commissions or service fees.
- ✓ Access CPD, tools, and resources to position yourself as a leader in retirement transition planning.

Help your clients exit smart and retire with a stronger SMSF.



**Business Exit
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Valuable. Scalable. Transferable.

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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