Revenue Sharing & Affilliate Programs

for CPAs and Finance Professionals

MAXPOINT ADVISORS
COMMERCIAL FINANCE CONSULTING

Virtual, Outsourced, & Fractional
CFO Advisory Solutions

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About
MaxPoint Advisors

MaxPoint Advisors is a firm of professionals that are seasoned in corporate finance, accounting, management, and above all, the skills required to bring value, leadership, and guidance for the finance function of small and medium-sized businesses.

Our CFO Advisory team is not simply just another financial consultant. We are a hands-on and committed financial business partner that is dedicated to being co-creators of the future of our client's business. That's what makes us different than the average CFO consultant and advisory firms - *we are co-creators of the future success of our client's businesses.*

MaxPoint Advisors is a non-CPA financial advisory firm and was formed in 2020. The company is headquartered in Indianapolis, Indiana, USA.

What is CFO Advisory?

A virtual, fractional, interim, or outsourced CFO (Chief Financial Officer) Advisor, is a highly-skilled and experienced corporate finance management professional that employs a dedicated, tactical, and comprehensive forward-thinking approach to helping businesses understand their financial performance and plan for future growth.

A CFO brings value to business owners through the strategic enhancement of revenue, profit, and cash flow in their companies.

With an average CFO salary range between $200,000 - $500,000 per year, most small and medium-sized businesses can not afford a full-time Chief Financial Officer. In a fractional and virtual capacity, MaxPoint Advisors allows growing company's to tap into the rare skillsets that CFO's can bring to their organizations. A CFO can add value by executing:

- Business Modeling, Forecasting, Metrics and Analysis
- Proposal and Implementation of Tactical Corrective Actions
- Cash Management, Treasury, and Banking
- Profit Improvement Planning and Restructuring
- Merger, Acquisition, Sale, and Due Diligence Leadership

Challenges for CPAs & Bookkeepers

There are three challenges facing accountants and bookkeepers:

Challenge #1: To get paid more you have to take on more clients (or work more hours)
Challenge #2: You have a ton of competition
Challenge #3: A lot of accounting software is trying to automate your job away

Your job is to record the past correctly. However, many of your clients **don't really care** about the quality of the books as much as you think they should. To them, you and your competitors do the same thing (which is why you really can't raise your fees).

What clients do care about is understanding their numbers and getting guidance on how to have a growing and more profitable business. But, there's two problems with this.

- Problem #1: You're not getting paid to do that.
- Problem #2: You're not sure, exactly, how to do that, which is totally OK.

You're getting paid to do compliance work. This means that to make more money you have to take on a lot of low-paying and demanding clients. And, because your income is tied directly to how much you work, you have to continuously put in long hours servicing your clients while, at the same time, trying to find new clients. **This is a recipe for burnout.**

Plus, even if you wanted to provide a business advisory service you don't have a scalable and efficient way to do that. **Until now...**

What you need is a finance business partner. A partner that will allow you provide a high-quality CFO service to your clients.

By offering a CFO service you'll not only be able to separate yourself from your competition, you'll also be able to command higher fees, have predictable recurring revenue, and have a bigger impact on your clients' lives.

Benefits of Offering
CFO Advisory to Your Clients

BENEFITS FOR YOU

1 Grow your financial services practice without extra effort or working more hours.

2 Retain more clients by offering a sophisticated product.

3 Secure an additional recurring revenue source.

BENEFITS FOR YOUR CLIENT

1 One clear path to enhance revenue, profit, and cash flow in their business.

2 Increase in yearly take-home pay, stock dividend, and owner distributions.

3 Access to experienced corporate finance management professionals for a fractional cost.

Finance Affiliate Program: The Mini-CFO

Become a Finance Affiliate Program member for our Mini-CFO subscription service and receive a recurring 15% - 25% revenue share for your clients that purchase our Mini-CFO Small Business Coach Subscription. The Finance Affiliate Program is for financial professionals like you to increase your financial product offerings and ultimately expand your revenue!

The Finance Affiliate Program is for financial professionals such as:

- Accountants (CPAs and Non-CPAs) & Bookkeepers
- Commercial Insurance Brokers
- Wealth Advisors & Financial Advisors
- Tax Preparers & Enrolled Agents
- Credit Repair Specialists
- Business Loan Brokers
- Small Business Bankers
- Attorneys & Law Firms
- United States Tax Court Practitioners
- Business Consultants & Start-up Incubators

MaxPoint Advisors is an outsourced, virtual, fractional, and interim CFO (Chief Financial Officer) Advisory firm for small and medium-sized businesses. Our flagship small business incubation service is THE MINI-CFO SUBSCRIPTION and is best suited for businesses of all industries that are generating under $500,000 in revenue per year. **The Mini-CFO Advisor acts as an incubator, trusted counselor, business coach, and financial strategist with the ultimate goal of helping the businesses grow, increase profit, and surpass $500,000 in annual revenue.** Visit our page at https://www.maxpointadvisors.com/mini-cfo to learn more about The Mini-CFO Subscription.

As a financial professional that has a client or customer base, the MaxPoint Revenue Share Program gives you the ability to offer your customer a more sophisticated product offering that will give them one clear path to grow their business.

COMMISSION STRUCTURE

The New Venture Plan: $149 per month
Rev Share: *15% x 149.99 = $22.35 per client per mo*

The Growth Plan: $399 per month
Rev Share: *15% x 399 = $59.85 per client per mo*

The Accelerator Plan: $599 per month
Rev Share: *15% x 599 = $89.95 per client per mo*

The MaxPoint Plan: $799 per month
Rev Share: *20% x 799 = $160 per client per mo*

Contact us today for more information on how you can partner with us.
connect@maxpointadvisors.com | 888-403-7003

MAXPOINT ADVISORS
COMMERCIAL FINANCE CONSULTING

Revenue Share Program: CFO Advisory

Become a MaxPoint Revenue Share Program member for our virtual CFO Advisory solution and receive a recurring 20% referral fee for your clients that you refer to MaxPoint Advisors. The Finance Affiliate Program is for financial professionals like you to offer a sophisticated and strategic solution for your business clients.

The Finance Affiliate Program is for financial professionals such as:

- Accountants (CPAs and Non-CPAs) & Bookkeepers
- Commercial Insurance Brokers
- Financial Advisors
- Tax Preparers & Enrolled Agents
- Business Bankers
- Attorneys & Law Firms
- United States Tax Court Practitioners
- Business Consultants & Start-up Incubators

WHO WE ARE & WHAT WE DO

MaxPoint Advisors is an outsourced, virtual, fractional, and interim CFO (Chief Financial Officer) Advisory firm and finance business partner for small and medium-sized businesses. Our flagship CFO Advisory solution has been fined tuned for companies that generate between $500,000 and $15,000,000 in annual revenue. Our CFO Advisors can give your client one clear path to increase **Revenue**, **Profit**, and **Cash Flow** in their business. Our proven system, The MaxPoint Path, strategically enables our CFO Advisors to:

- Strategically track Revenue, Profit, Cash Flow, in your clients' business and increase take-home pay
- Analyze the company's Financial & Operational Strengths and Weaknesses
- Propose and help implement Corrective Actions
- Venture Capital Acquisition & Funding Management **and more...**

As a financial professional that has a client or customer base, The Finance Affiliate Program gives you the ability to offer your customer a more sophisticated product offering that will give them one clear path to increase Revenue, Profit, and Cash Flow in their business.

COMMISSION STRUCTURE

Client Size by Annual Revenue	Monthly Revenue Share
$500,000 - $2,000,000	**$300**
$2,000,000 - $5,000,000	**$500**
$5,000,000 - $15,000,000	**$640**

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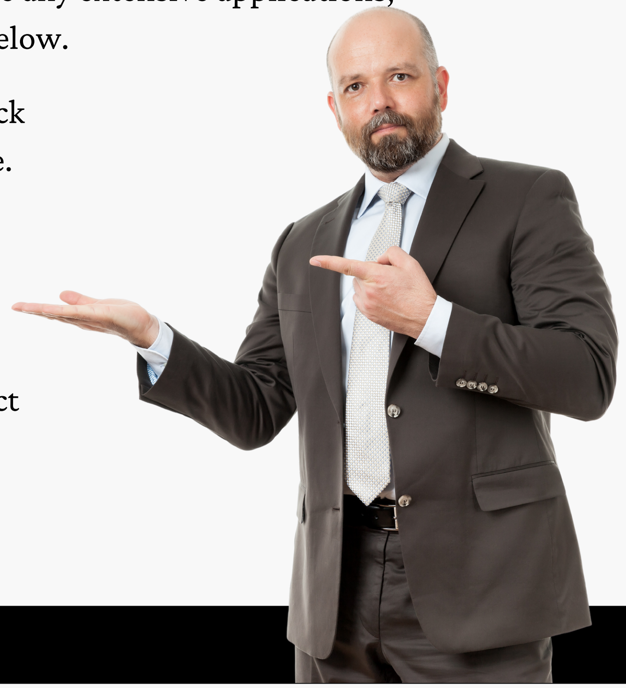
How to become a Strategic Affiliate?

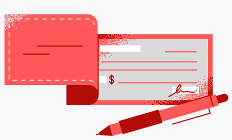
Enrollment

Becoming a strategic partner is simple and easy. It doesn't require any extensive applications, trade credit checks. To enroll in our programs, follow the steps below.

1. Go to **www.maxpointadvisors.com/financepartner or** click on the "finance affiliate" link at the bottom of the home page. You can also email us directly at contact@maxpointadvisors.com.
2. Fill out and submit the enrollment form.
3. Schedule the enrollment call.
4. The Managing Partner of MaxPoint Advisors will then contact you about specific details and make sure there is a good fit between our firm and yours.



Cheque by mail



Pay Out Methods

Direct Deposit