

FOR VALUATORS • CEPAS • M&A ATTORNEYS • BUSINESS
BROKERS

Send the right client. Get paid twice.

A straightforward referral program for advisors who work with service business owners.
Clear terms, real money, no fine print to decode.

HOW IT WORKS

01	You Refer	Introduce us to a service business owner who's thinking about scale, exit, or just had a valuation done.
02	They Book	If it's a fit, the owner books a 75-minute Clarity Session (\$500) — no obligation beyond the call itself.
03	You Get Paid	\$100 lands the moment their session is complete. If they sign on as a retainer client, you get another \$500.

FEE STRUCTURE

\$100

Per Completed Clarity Session

Paid within 15 days of any session you referred that books and runs — whether or not it converts further.

\$500

Retainer Conversion Bonus

Paid within 15 days of the referred client's first payment on a fractional COO retainer, if that happens within 12 months of the original referral.

Who's a Good Fit to Refer

- \$5M–\$15M in annual revenue
- Preparing to scale, sell, or recently valued
- Owner is still the operational bottleneck

How to Send a Referral

No forms, no portal. Email the owner's name and contact info, or just CC me on an introduction. I'll follow up within 24 hours and keep you posted on where it goes.

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