

Top 10 Reasons Accountants Refer Their Clients to Us to Arrange Financing

Accountants often ask us, “Why should I refer my clients to you to arrange their financing?”

There are many reasons, including:

1. **No accounting, audit or tax services** – We do not offer accounting, audit or tax services so we do not compete or “steal” your clients. Our various speciality solutions typically complement those of a typical accounting firm, with a range of services to help companies experiencing growth, a bump in the road or distress.
2. **Professionalism and integrity** – Our team is led by a CA/CPA and includes other CPAs, all trained and committed to a high degree of professionalism and integrity that your clients typically experience.
3. **Strong technical and product knowledge** – As CPAs/CAs, we are experts in understanding the complexities of business and our additional years of financing experience provides us in-depth knowledge of the often complex terms and conditions inherent to the many forms of available financing.
4. **Confidentiality** – Like you, we are bound by professional codes of ethics and conduct. All our staff sign confidentiality agreements and we maintain the strictest confidentiality with clients’ personal and financial information. Plus given our “one-stop shopping” solution, your client’s confidential information is only sent to one firm to manage.
5. **One-stop shopping solution** – We can arrange a wide range of financing—including factor, bridge, ABL, working capital, term solutions, subordinated debt—and, for many different types of credit profiles.
6. **Legwork** – We handle the “heavy lifting” of finding and managing the right lender, allowing you to focus on your core service offerings with clients. We will find the right solution for your client—and manage the time-consuming details of the transaction.
7. **Customized solutions** – We help identify the actual amount and type of financing required and create tailored solutions to meet your clients’ needs. There is no cookie cutter solution when it comes to arranging financing. We have the expertise to arrange a customized solution that works.
8. **Access to a wide range of lenders** – We have access to more than 100 lenders who offer a wide variety of financing solutions, segmented by credit profile and transaction size. We have already vetted the lenders and can quickly help your client find the right one for them.
9. **No fees or commissions from lenders** – We work directly for your client and do not receive any fees or commissions from lenders. Therefore, we are not incentivized to recommend one lender over another.
10. **Success fee based** – Other than a basic commitment fee, the majority of our fee is tied into getting your client financing and generally we get paid when your client receives their financing.