



PROFESSIONAL PARTNER PROGRAM

Build stronger financial operations.

Build lasting value for your firm.

A professional growth program for CPAs, CAs, ACCAs, accountants, bookkeepers, outsourced CFOs, consultants, and technology advisors who want to give clients greater financial clarity, discipline, and confidence.

IFRS and US GAAP Financial Reporting

FinovatePro is designed to support accounting and financial reporting under both IFRS and US GAAP. The platform embeds accounting logic, structured workflows, and financial controls to improve accuracy, consistency, compliance, and reporting reliability.

Designed to support accounting and financial reporting under IFRS and US GAAP.

20%

COMMISSION IN YEAR ONE

12%

CONTINUING COMMISSION

20%

CLIENT SAVINGS FOR 3 MONTHS

THE PROPOSITION

They save. You grow together.

Your clients receive preferred introductory pricing. Your firm earns recurring commissions. Together, we help organizations establish stronger accounting, reporting, controls, and decision-making.

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THE OPPORTUNITY

A partnership built around client value

FinovatePro is a financial operating system designed to help organizations move beyond disconnected bookkeeping and toward structured financial management. It combines accounting workflows, financial controls, industry-focused capabilities, and decision-ready reporting in one environment.

PARTNER PROMISE

More than a referral link

The strongest FinovatePro partners do more than distribute a code. They help clients strengthen financial discipline, improve reporting, and build finance functions that can scale.

Built for professionals clients already trust

- CPA and accounting firms
- Bookkeeping and payroll firms
- Outsourced CFO and controller practices
- Government contracting and nonprofit consultants
- HOA and community-association professionals
- Business, management, technology, and ERP advisors
- Banks, lenders, chambers, and business-support organizations

Why the model works

01

Client value first

The recommendation begins with an operational need-not a coupon.

02

Recurring economics

Partners participate in the subscription value they help create.

03

Professional guardrails

Human review, accurate representation, and client protections preserve trust.

VALUE CREATION

What your clients gain

FinovatePro helps partners turn financial software into a stronger operating discipline. The platform supports organizations that need reliable records, stronger accountability, and clearer information for decision-makers.

01

Stronger books and records

Structured workflows support more complete, consistent, and reviewable accounting.

02

Decision-ready reporting

Financial information can be organized for management, boards, lenders, investors, and regulators.

03

Better control and accountability

Purpose-built workflows help reduce dependence on informal processes and disconnected spreadsheets.

04

Industry relevance

Focused capabilities support privately held businesses, professional services, government contractors, nonprofits, PTOs, and community associations.

05

Scalable finance operations

Organizations can establish repeatable processes that grow with their reporting and oversight needs.

06

Higher-value advisory relationships

Partners can pair the platform with bookkeeping, controller, CFO, implementation, or consulting services under separate client agreements.

IMPORTANT

Technology supports - not replaces - professional judgment

No software can guarantee IFRS or US GAAP compliance-or a particular financial outcome. Accurate information, proper system configuration, competent professional judgment, and application of the appropriate reporting framework remain essential. FinovatePro strengthens this process by embedding accounting logic, structured workflows, and financial controls designed to improve accuracy, consistency, and reporting reliability.

PARTNER ECONOMICS

Simple economics. Long-term alignment.

The program rewards partners for qualified relationships that become active, retained FinovatePro customers. The structure balances meaningful partner value with an immediate benefit for the client.

20% MONTHS 1–12	12% MONTH 13 ONWARD	20% CLIENT DISCOUNT
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How earnings work

01	First-year recurring commission Earn 20% of eligible subscription payments actually received from each qualified referred client during the client's first 12 months.
02	Continuing recurring commission After the first year, earn 12% for as long as the qualified client remains active and the partner account remains in good standing.
03	Client introductory savings Qualified clients using your approved link or referral code receive 20% off eligible subscription fees for their first three months.

Illustrative earnings-not a guarantee

Illustrative case	Monthly subscription	Partner rate	Annual commission
One client - year one	\$349	20%	\$837.60
Ten clients - year one	\$349 each	20%	\$8,376.00
One retained client - later year	\$349	12%	\$502.56

Illustration assumes uninterrupted payment for 12 months and excludes taxes, refunds, credits, chargebacks, implementation fees, professional services, and other ineligible amounts. Actual earnings vary.

CLEAR RULE

Commissions follow collected eligible revenue

Referral attribution, validation, payment timing, exclusions, renewal, and termination provisions are governed by the FinovatePro Partner Agreement.

CHOOSE YOUR PATHWAY

Two ways to build with FinovatePro

Start with the model that matches your firm today. Eligible partners may deepen the relationship as their experience, capabilities, and client demand grow.

Referral Partner

INTRODUCE QUALIFIED ORGANIZATIONS

Best for professionals who want FinovatePro to manage the product demonstration, subscription, and platform onboarding.

- Share a unique referral code
- Make documented introductions
- Join qualified demonstrations
- Track referrals and commissions
- Use approved marketing materials

Advisory & Solutions Partner

BUILD SERVICES AROUND THE PLATFORM

Best for firms incorporating FinovatePro into accounting, bookkeeping, outsourced CFO, implementation, or advisory services.

- Conduct approved demonstrations
- Assist with setup and workflow design
- Provide qualified accounting services
- Deliver client training
- Earn separate professional-service fees

What every approved partner receives



Partner workspace

A demonstration environment for learning, presentations, and qualified client demonstrations.



Enablement materials

Product overviews, industry fact sheets, email and proposal language, implementation checklists, and approved branding.



Training and support

Product orientation, client qualification, demonstration guidance, onboarding assistance, technical support, and escalation help.



Protected attribution

Approved referrals are recorded and reviewed under clear attribution rules.

PARTNER JOURNEY

From application to client impact

The process is intentionally straightforward, but the standard is professional. Every application is reviewed by a real person.

01	Apply Tell us about your firm, services, client base, and intended use of the program.
02	Professional review We assess business legitimacy, experience, reputation, service quality, and fit. Most complete applications receive a decision within two business days.
03	Orientation Approved partners receive their dashboard, demonstration resources, referral tools, program terms, and introductory training.
04	Introduce qualified clients Share your approved link or make a documented introduction. FinovatePro can support discovery, demonstration, and onboarding.
05	Track and grow Monitor client status and commission activity. Develop deeper advisory offerings as your experience grows.

Designed to respect your client relationship

RELATIONSHIP PRINCIPLE

Your professional relationship remains yours

FinovatePro supports the technology relationship. Your accounting, bookkeeping, consulting, tax, or advisory relationship remains governed by your separate agreement with the client. Partners may charge separately for services they are qualified and permitted to provide.

Complimentary access-clearly defined

Complimentary access-clearly defined

Approved partners receive a partner workspace and demonstration company. A production subscription used for the partner firm's own accounting may be purchased separately at preferred partner pricing.

WHERE PARTNERS CAN WIN

Built for focused advisory conversations

FinovatePro allows professional firms to lead with the needs of a specific client segment-not a generic software pitch.

01

Privately held businesses

Supporting buy-sell transactions, general businesses, e-commerce companies, retailers, and other privately held organizations with stronger financial discipline, management reporting, and scalable accounting processes.

02

Professional and technical services

Project-oriented financial visibility and operating controls.

03

Government contractors

Structured accounting and reporting support for contract-driven environments.

04

Nonprofit organizations

Fund-aware workflows, stewardship, and stakeholder reporting.

05

PTOs and associations

Clear accountability, board visibility, and repeatable financial operations.

06

HOAs and community associations

Industry-focused accounting and reporting needs aligned to community governance.

CONVERSATION STARTER

Lead with the operating problem

Ask: What financial information does leadership, the board, a lender, an investor, a regulator, or a funder need-and how reliably can the organization produce it today?

TRUST ARCHITECTURE

Professional standards protect everyone

FinovatePro handles financial information and supports important accounting and reporting processes. The partner network must reflect the same commitment to integrity, accuracy, confidentiality, and responsible professional conduct.

Partners agree to

- Represent FinovatePro accurately and honestly
- Avoid exaggerated, unsubstantiated, or guaranteed outcome claims
- Protect confidential, personal, and client information
- Obtain authorization before sharing client information
- Disclose the partner relationship when appropriate
- Comply with applicable ethical, licensing, independence, and professional requirements
- Use approved FinovatePro branding and marketing claims
- Recommend FinovatePro only when it reasonably fits the client's needs
- Disclose or appropriately manage conflicts of interest
- Maintain responsive and professional client service

Fair and enforceable program controls

FinovatePro may decline, suspend, or terminate a partnership to protect clients, the platform, or the integrity of the network. Self-referrals, duplicate referrals, fictitious accounts, unauthorized incentives, and artificial transactions are not eligible. Existing customers and prospects already in an active FinovatePro sales process generally do not qualify as new referrals.

PROFESSIONAL BOUNDARY

Partner status is not a professional license

A partner may not provide regulated, licensed, attest, tax, legal, or investment services unless independently qualified and permitted to do so. Participation does not create an agency, franchise, employment, fiduciary, or exclusive relationship.

QUESTIONS

Frequently asked questions

Is there a fee to join?

No. There is no fee to apply for or participate in the standard program. Optional training, certification, events, production subscriptions, or implementation services may carry separately disclosed fees.

Must my firm be a FinovatePro customer?

No. Approved partners receive a partner workspace, demonstration company, and one complimentary production subscription for their firm's internal accounting. No separate purchase is required.

Is certification required?

No. Certification is not required for standard Referral Partner status. Advanced implementation or specialized service designations may require training or demonstrated competency.

How quickly are applications reviewed?

Most complete applications receive a decision within two business days. Applications requiring verification may take longer.

How is the client discount applied?

A qualified client using the approved link or code receives 20% off eligible subscription fees for the first three months. It generally cannot be combined with another promotion without written approval.

Does FinovatePro take over my client?

No. FinovatePro manages the technology relationship. Your professional services remain governed by your separate client agreement.

When are commissions paid?

Eligible commissions are paid under the schedule in the Partner Agreement after validation and any applicable refund or chargeback period.

Can my firm lose partner status?

Yes. Misrepresentation, misuse of client information, fraudulent referrals, material noncompliance, or conduct inconsistent with program standards may result in suspension or termination.

Free Courses and Professional Certification

Approved partners receive complimentary access to FinovatePro Academy at finovateproacademy.com, including practical courses in accounting, financial reporting, IFRS, US GAAP, platform implementation, and advisory services. Partners may also complete FinovatePro certification at no cost to strengthen their expertise, demonstrate competency, and build greater client trust.

**FINOVATE**PRO

A STRONGER CLIENT PROPOSITION

Ready to build with FinovatePro?

Build recurring revenue while helping clients operate with stronger accounting, clearer reporting, and greater financial confidence.

NEXT STEP

Apply to become a FinovatePro Professional Partner

The application takes only a few minutes. Every application is reviewed by a real person, and most complete applications receive a decision within two business days.

NO APPLICATION FEE • NO MINIMUM REFERRAL COMMITMENT • PROFESSIONAL STANDARDS ALWAYS**01**

APPLY

02

GET REVIEWED

03

START REFERRING

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