



Partnership Opportunities For Wealth Management & CPA Professionals

White Label Partnership Options & Process

1) Provide our In-House Investment Banking & Business Exit Advisory for Clients

- i. Clients have a trusted business owner/investment banker to provide valuable advice/services on the process, timing, and value for the sale of their business
- ii. Revenue split opportunities
- iii. Four Pathways to an Optimum Exit Value for Clients:
 - a. Sell
 - b. Tune-Up and Sell
 - c. Assess, Invest, Grow & Sell
 - d. Restructure, saving significant financial loss and regulatory liability.
- iv. See [Video](#) on the four pathways and [Website](#) on the process
- v. See [Case Studies](#) on all exit engagements, growth projects and restructuring testimonials
- vi. See [Christopher Riley's LinkedIn Page](#)
- vii. See [Exit Engagement Options](#)
- viii. See [Urgent Services & Restructuring Options](#)

2) If Mutually Agreeable, We Can Acquire a Portion of the Practice

- i. Add business exit advisory to services for clients
- ii. Improve revenues with new business exit services
- iii. Provide a growth or succession plan for owner
- iv. Access to all Cutwater company services (see below)

3) If Mutually Agreeable We Can Acquire and Grow Practices With You

- i. We are building a larger network of professionals wanting holistic services to their clients
- ii. We provide a steady stream of income at, and after, retirement.

4) Next Steps & Process

- i. Initial Meeting
- ii. Review Actual Engagements & Case Studies
- iii. LOI and/or Term Sheet
- iv. Due Diligence
- v. Finalize Partnership Agreement

Other Cutwater Companies & Services For Any Size Client Business

- i. [Cutwater Overview Splash Page & Exit Strategy Navigation Matrix™](#)
- ii. [United Cutwater: Growth PE company to invest, grow & sell larger companies](#)
- iii. [Financial Guardians Exits for small businesses](#)