

Kaplan CFO: Referral Partner Program

Every business community is an eco-system of buyers and sellers – an intricate web of inter-dependent manufacturers, suppliers and service providers. The relationships built over time, nurture and sustain our companies and strengthen the community. At Kaplan CFO, we understand this better than most.

“I’ve never hesitated to introduce any of my clients to Kaplan CFO Solutions, they do the same for me. Over the last 10 years, our working relationship has created tremendous growth opportunities—for us and our clients.”

TONY NEWSOME, COMMERCIAL BUSINESS RISK CONSULTANT, BANKERS INSURANCE

Shared success = business community growth

Since 2008, Kaplan CFO has relied on our referral partners to help us create the greatest possible value for our clients. Our referral partners, in turn, provide new opportunities for us. Each time we add another CFO the network grows.

Today, Kaplan CFO's referral partner network includes more than 250 local and trusted service providers across western North Carolina and the Tri-Cities. Each has their specialty— banking, finance, insurance, legal, accounting, HR and more — with all pursuing the same goal: continued growth and maximum value for the client. That's why we created the Kaplan CFO Referral Partner Program.

Understanding what's important

We asked our referral partners for input on their top challenges and interests. Their answers were strikingly similar, they include access to decision makers, business differentiation and lack of market presence. In recommending ideas to address these challenges, their answers pointed to three main areas.

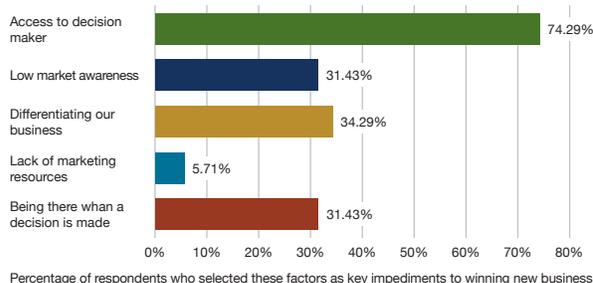
Insight Understanding the mindset of the decisions makers

Exposure Expanding your market presence

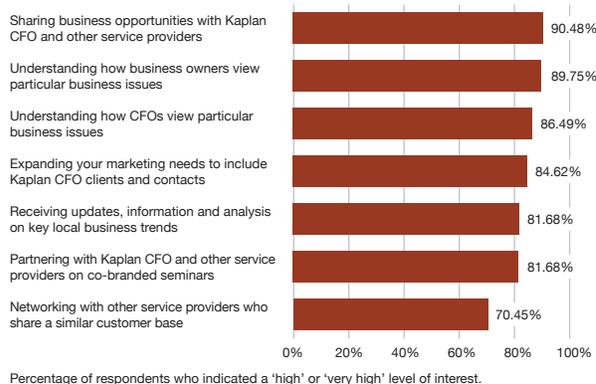
Access Putting you in touch with the decision makers

Armed with this information, along with our own insights and experiences, we developed the components of The Kaplan CFO Referral Partner Program.

Key Business Challenges



Most Attractive Opportunities



“When I recommend Kaplan CFO, it’s because I know they’ll make an immediate and meaningful impact. Their experience and focus — on the strategic motivations and personalities of stakeholders — is best in class.”

NEIL K. NEWBERRY
SENIOR VICE PRESIDENT,
SUN TRUST BANK

“Whether Kaplan CFO bring us in or vice-versa, the results are equally impressive. Their financial expertise, paired with our employee management solutions, give clients the confidence to address their toughest challenges and achieve lasting success.”

MICHELLE FLECKNER
VP OF HCM SOLUTIONS
PLATINUM GROUP

The Kaplan CFO Referral Partner Program

A cohesive network of Referral Partners, where members share their insights and relationships, create business opportunities for each other and greater value for their customers

Our commitment

| Core Area | Objective | Program Components |
|---------------------------|--|---|
| Business Insight | Help you better understand how our business community is evolving and how that change is affecting the businesses we all serve | Monthly emails from Kaplan CFO with nuggets you can use Deeper dives through white papers, success stories and analysis Thoughts and tips from other referral partners and secrets to success from business owners |
| Market Exposure | Provide a platform to amplify your message in the market and increase top of mind awareness for your business | Section of Kaplan CFO website dedicated to Referral Partners Publishing Referral Partner blogs and successes on our website and LinkedIn pages Chances to partner with Kaplan CFO for co-branded events that feature your expertise |
| Access to Decision Makers | Create opportunities to interact with business owners, Kaplan CFOs and other referral partners | Social networking events for Referral Partners to meet and exchange information and opportunities Educational seminars that bring Referral Partners together with C-suite decision makers |

Your participation

To be successful, the Kaplan CFO Referral Partner program must be mutually beneficial, with Kaplan CFO and our Referral Partners having a shared ownership and responsibility. The above outlines our role. Here is what we need from you.

Engage Take advantage of the opportunities provided and support those within the program.

Market Exposure Get to know other referral partners and look for opportunities to refer them to your clients.

Share the Referral Partner program with others at your firm

Continue to advocate for Kaplan CFO, with your clients and in the marketplace

With your on-going participation and input, the Kaplan CFO Referral Partner Program will continue to develop and grow as we look for new ways to collaborate. Should you decide, you can opt out at any time by unsubscribing from further emails.

We're in this together

Individual ability and commitment take us only so far. Long-term success relies on strong partnerships built on mutual trust and advocacy. That is the driving concept behind the Kaplan CFO Referral Partner Program. To learn more or to become a part of the Kaplan CFO Referral Partner Program, contact us at referralpartners@kaplancfo.com.



kaplancfo.com

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