

Referral Partner FAQ

Why should my business consider a Kaplan CFO Referral Partner?

They have demonstrated their value and earned our trust. Our Referral Partners are selected based on their past work with one or more of our CFOs and have proven their ability to add value for our clients.

How does Kaplan CFO select its Referral Partners?

Our Referral Partners are business professionals—lawyers, bankers, insurance agents, marketing professionals, payroll companies, etc.—with whom our CFOs have developed a trusted relationship. Referral Partners must apply to become part of the Kaplan CFO network and are selected based on their demonstrated experience and their integrity.

What's the benefit for Kaplan CFO? How does the Referral Partner benefit?

The relationship between Kaplan CFO and our Referral Partners is based on mutual respect and the value we are able to add to our clients. When one of our CFOs recommends a specific Referral Partner for an engagement, it is because their skillset aligns with the needs of the client. The same is true when Referral Partners recommend Kaplan CFO to their clients.

Does Kaplan CFO provide a referral fee to their Referral Partners?

No. Kaplan CFO neither provides nor accepts any referral fees.

Do Referral Partners have industry exclusivity?

No, for a couple of reasons. Whenever we bring a new CFO on board, he or she brings their existing network of preferred service providers with them; maintaining those relationships are important. Plus, having multiple Referral Partners from the same industry enables us to offer specific personalities and specialized skillsets that more closely match our clients' needs.

What if I just need the services of the Referral Partner and not Kaplan CFO?

No problem. We would just appreciate you telling the Referral Partner where you got their name.

Is Kaplan CFO's relationship with the individual Referral Partner or their company?

Our relationship typically begins with the individual Referral Partner and grows over time to include others in the same company.

Does Kaplan CFO give preferential treatment to Referral Partners in a competitive bid situation?

No and yes. Any competitive bid process begins by narrowing the field, based on objective factors such as cost and availability. In this phase, our Referral Partners must be able to prove their value. Once the process advances and the determining factors become more subjective, our experience with the specific Referral Partner helps to inform the final decision. Our first responsibility is to our client, and our Referral Partners recognize and respect that.