BEFORE YOUR CALL WITH MAX

Most COIs don't refer.
We have the ones who do.

Watch the short video we sent, then read this. Our call skips the basics — come ready to explore whether the COI route is the right growth lever for your practice.

650K+
CPAS & ATTORNEYS IN OUR DATABASE

250K
COI CONVERSATIONS PER MONTH, NATIONWIDE

1%
OF COIS ARE THE RIGHT FIT FOR ANY GIVEN ADVISOR

WHY FIRMS COME TO US

Three paths, one solution

One-sided relationships. You refer out. Nothing comes back. You're done feeling taken advantage of.

Slow, unpredictable growth. You have a few great partners built by chance over decades. Replicating that alone is too slow — it's faster to use a firm that already has the infrastructure.

Book acquisition. You're buying a book of business and need the COI infrastructure to retain and grow it after close.

EXCLUSIVITY

One advisor per market. Your pipeline only compounds.

Once we introduce you to a CPA or attorney, we never give that same connection to another advisor. Period.

In any given territory, we work with one advisor per client profile. Your competitors don't get the same partners through us. When a partner's taken, they're taken.

Our clients come to us with thriving practices. We fix their partnerships — not their business. We scale what's already working. We don't fix broken ones.

HOW IT WORKS

01

We screen the haystack

100—200 COI conversations to surface a single partner who fits you specifically. We screen for client fit, existing advisors, conflicts, and genuine openness to refer.

02

We book them on your calendar

We look like an extension of your team. We confirm the meeting more than once and send a full briefing — their book, what they want, why they want to partner. First meetings usually land in week one.

03

You own the relationship

You walk in prepped, to a warm introduction. We hand you the playbooks from our top clients and a simple nurturing system. Ten minutes a month to stay top of mind. We don't sit in your meetings.

7 figures
RECURRING REVENUE, ONE QUARTER

"TradesMark added seven figures in recurring revenue for my practice in a single quarter."
– TYLER BOLYARD

29 years
IN THE BUSINESS

"I've been in this business 29 years and I've never seen anything like it."
– WAYNE CASEY

5—6
PRODUCING PARTNERSHIPS PER QUARTER

Our clients consistently build 5—6 producing COI partnerships per quarter. This isn't cherry-picked — it's what the system does.
– CONSISTENT CLIENT AVERAGE

Come ready. Your market may still be open.

Our call determines if the COI route fits your practice and whether your territory is available.

- QUIET ROOM
- CAMERA ON
- CALENDAR ACCEPTED