

— PARTNER WITH PROBIZ

A Referral Partnership for Accountants

Helping your clients get the right finance, without you having to become their broker.



Finance-ready

Stage 4 of 6

\$ 250K



You're updated

You already have your clients' trust on the numbers. When a business finance question comes up — buying a business, upgrading equipment, cash flow pressure, a commercial property purchase — Probiz Finance picks that conversation up from you, keeps you informed throughout, and hands the client back once it's sorted.

— AT A GLANCE

The partnership in 30 seconds



Fast, focused

We move at your client's pace



You keep the client

We handle finance only



You're kept informed

Updates at key stages



No cost, no obligation

Nothing owed if they don't proceed

1

You flag the client



2

We reach out within a business day



3

We keep you updated



4

Your client gets finance-ready

01 — WHY PARTNER WITH US

Why Partner With Probiz Finance

You already have the relationship — we just help you close the finance conversation.



We broker, we don't advise

We bring finance options to the table. We don't give tax or structure advice, and we're not trying to take over your client relationship — you keep that.



Fast turnaround

Many business finance applications are approved within 24–72 hours, so your client's plans don't stall waiting on finance — useful when a deal has a deadline.



Access to 50+ lenders

Rather than one bank's product range, we compare options across 50+ lenders to find a genuine fit for the client's situation.



You stay in the loop

We update you at key stages — especially anything that could affect a client's structure or tax position — so you're never blindsided.



No cost, no obligation

Referring costs your practice nothing, and there's no pressure on the client. If it's not the right fit, we'll say so.



"Our job is the finance, full stop. You keep the relationship — we keep you in the loop."

Pooja Choudhary · Business Finance Specialist, Probiz Finance

You keep

The client relationship

We handle

The finance conversation

You hear

Updates at key stages

Nobody pays

If it doesn't proceed

02 — WHERE WE FIT

Signs a client needs us

These moments come up in client meetings all the time — usually framed as a tax, structure or cash flow question.

WHAT YOU'RE HEARING



"I'm looking at buying a business / practice"



"We're growing faster than our cash flow can keep up"



"We're about to sign a lease / buy our premises"



"We need new vehicles / equipment / machinery"



"Our business loan doesn't feel competitive anymore"



"Can my SMSF buy our business premises?"



"I'm thinking about buying into a franchise"



"Customers are paying slower than we'd like"

THE LIKELY FINANCE NEED



Business acquisition finance



Working capital, invoice finance or a line of credit



Commercial property finance



Asset & equipment finance



Business loan refinancing



SMSF commercial property lending



Franchise finance



Invoice finance



A simple rule of thumb

If you're not sure whether something is a genuine finance opportunity, send it through anyway — a two-minute chat is enough for us to tell you either way.

03 — THE PROCESS How referring works

- 1 **You flag the opportunity**
A name, a contact number or email, and one line about what they need. No forms, no formal handover.
- 2 **We reach out directly**
Usually within one business day — professional, no pressure, and clear about who referred them.
- 3 **We keep you updated**
At the key stages, especially anything touching their structure or tax position.
- 4 **You keep the relationship**
Your client gets a finance option. We're not chasing your other services — we stay in our lane.
- 5 **No cost, no obligation**
If the client doesn't proceed, nothing is owed by anyone.

04 — YOUR PART What we need from you

- ✓ **A warm introduction**
A name, phone or email, and one line on what they're looking at.
- ✓ **Context, if you can (optional)**
Timing, rough numbers, or what's been discussed — only if your client is happy to share.
- ✓ **That's it**
We do the legwork and come back to you with updates.

On referral rewards: Under our Referral Partner Agreement, you receive a \$250 gift card for each referred client whose loan settles. It's disclosed to your client upfront, so it's always transparent and consistent with your professional obligations.



Let's set up a proper introduction

A short, no-obligation call with Pooja about how a referral partnership could work for your practice.

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 **Book a 20-min chat**