Boundless Referral Partner Program

10% of first-year engagement fees, uncapped

WHO THIS IS FOR

Trusted peers who know leaders at mid-sized professional services firms, advisory firms and nonprofits. CFOs, COOs, partners, operators, consultants and vendors who want their network to have a reliable systems and finance partner.

HOW IT WORKS

- You introduce us to a qualified contact who fits our ideal client profile.
- We run our standard discovery process to see if there is a mutual fit.
- If they become a Boundless Analytics & Finance client, you receive 10% of fees from their first year of engagement with us (the first step, the move, and the monthly fee).
- For the purposes of this program, "first-year engagement" includes the initial engagement and any follow-on work signed within the first 12 months, provided it is part of the same overall initiative.

WHAT COUNTS AS A REFERRAL

A referral is a warm, direct introduction where:

- You connect us by email or group message, and the contact agrees to a conversation.
- The opportunity is not already in active discussions with Boundless.
- The work is for Boundless Analytics & Finance (systems and finance), not for any regulated investment or securities activity.
- Referral attribution is valid for 12 months from the date of introduction. If a referred contact signs an engagement within that window, the referral counts.

PAYOUTS AND EXAMPLES

Referral fees are paid once we have received payment from the client and the engagement has begun.

ENGAGEMENT	FIRST-YEAR FEES	YOUR REFERRAL FEE
The first step only	$7,500	$750
The finance department, up to about 75 people (12 months at $12,000)	$144,000	$14,400
The finance department, 75 to 150 people (12 months at $18,000)	$216,000	$21,600

The first step is credited in full against the move when the move starts within 60 days, so it is not counted twice.

GUARDRAILS

- We may decline opportunities that are not a fit; if we are not the right partner, we will say so clearly to you and to the client.
- This program applies only to Boundless Analytics & Finance consulting work. It does not apply to any future regulated investment advisory services.
- Founding partners who join the referral program now will be grandfathered at this rate if terms change in the future.

READY TO REFER SOMEONE?

Send a warm intro to **sohrab@boundless.finance**, or book a call to talk through fit first: **calendly.com/boundless_finance/30**. More at **boundless.finance/partners**.