



CROWNED WEALTH TAX SOLUTIONS

REFERRAL PARTNER GUIDEBOOK

Turn the people you know into an income opportunity - without preparing a single tax return.

\$50 PER QUALIFIED REFERRAL

plus separate milestone cash bonuses

Earn \$1,400 total through your first 20 referrals.

Share. Connect. Earn.

Crowned Wealth handles the tax preparation. You simply make the introduction.



YOUR EARNING PATH

Referral pay + cash bonuses. Clear, simple, and worth sharing.

THE OPPORTUNITY

Make money from your network, not from preparing returns.

You earn **\$50 for every qualified referral** who completes and pays for tax preparation with Crowned Wealth. Milestone bonuses are paid **in addition to** your \$50-per-client referral earnings.

5

QUALIFIED REFERRALS

\$50 BONUS

\$250 referral pay + \$50 bonus

\$300 TOTAL EARNED

10

QUALIFIED REFERRALS

\$100 BONUS

\$500 referral pay + \$150 cumulative bonuses

\$650 TOTAL EARNED

20

QUALIFIED REFERRALS

\$250 BONUS

\$1,000 referral pay + \$400 cumulative bonuses

\$1,400 TOTAL EARNED

AFTER 20 QUALIFIED REFERRALS

Keep earning \$50 for every additional referral

Important: milestone bonuses are separate cash bonuses. They are added on top of the \$50 earned for each qualified referral.



HOW IT WORKS

FOUR SIMPLE STEPS

No software. No tax training. No preparing returns. Just connect us with people who need tax preparation.

01

SHARE

Tell someone about Crowned Wealth or send them Danielle's contact information.

02

CONNECT

Make sure the new client tells us who referred them.

03

COMPLETE

Crowned Wealth handles the tax preparation and the client pays the preparation fee.

04

EARN

Once the referral qualifies, you earn \$50. Hit a milestone and the applicable cash bonus is added on top.

What counts as a qualified referral?

- The person is a **new Crowned Wealth client**.
- They identify you as their referral source.
- They complete tax preparation with Crowned Wealth.
- Their tax preparation fee is paid.



YOUR REFERRAL TOOLKIT

Easy wording, simple rules, and everything you need to get started.

COPY + SEND

Simple referral script

“Need a tax preparer? I can connect you with **Crowned Wealth Tax Solutions**. They offer virtual tax preparation, so the process is easy from anywhere. Just tell them **[YOUR NAME]** referred you.”

SOCIAL MEDIA VERSION

Need help filing your taxes this season?

I can connect you with Crowned Wealth Tax Solutions for virtual tax preparation. Tell them **[YOUR NAME]** referred you.

PROGRAM DETAILS

- **One referral partner per client.** The client must identify the referring partner.
- **Do not collect tax documents.** Send the client directly to Crowned Wealth for intake.
- **Do not provide tax advice** or represent yourself as a tax preparer on behalf of Crowned Wealth.
- **\$50 referral pay applies to each qualified new client** who completes and pays for tax preparation.
- **Referral partners should disclose** that they may receive compensation for successful referrals.
- **Program terms may be updated** by Crowned Wealth Tax Solutions as needed.



READY TO SHARE & EARN?

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