

For Accountants & Fractional CFOs

Help Your Clients Access the Right Capital at the Right Time

As a trusted financial advisor, your clients turn to you when they need capital for growth, operations, or strategic initiatives. Alliance Financing Group gives you a reliable partner to connect them with — and earn referral fees for every funded transaction.

Why Partner with Alliance?

- + Earn referral fees on funded deals — add a revenue stream to your practice
- + AI-powered matching with 70+ lenders across Canada and the United States
- + Products for every stage: startup financing, growth capital, and restructuring
- + Confidential, professional process that reflects well on your advisory relationship
- + Dedicated team handles everything — you just make the introduction
- + 35 years of commercial finance expertise backing every transaction

Typical Scenarios from Your Practice

- + Client's financial review reveals need for working capital or bridge financing
- + Business planning engagement identifies equipment or expansion capital needs
- + Tax planning reveals opportunities for lease vs. buy optimization
- + Client needs to restructure or consolidate existing business debt
- + Fractional CFO engagement requires sourcing growth capital or operating lines

Full Product Suite

- + Equipment Leasing & Financing: \$5,000 - \$10M+ with flexible structures
- + Working Capital: Factoring, AR financing, inventory financing, term loans
- + Merchant Cash Advances: Fast capital for cash-flow-intensive businesses
- + Lines of Credit & Operating Facilities: Revolving credit solutions
- + Commercial Mortgages & SBA/SBL Loans: Real estate and government programs

Ready to Offer Your Clients More?

Visit alliancefinancing.ai/paul-morrison or call 1-800-660-3660 ext. 234