Wealth Enhancement®

Wealth Enhancement CPA Alliance Program

Elevate your practice.
Empower your clients.

If you're seeking new ways to provide added value to your clients, consider working with Wealth Enhancement.

By joining forces with a wealth management partner, you can expand the services you provide in a scalable way, ultimately benefiting your clients without changing your business structure.

Our CPA Alliance program can help you to improve client satisfaction and retention rates while creating a new revenue stream, all while allowing you to focus on what you do best.

By combining your tax experience with our local advisor teams, Roundtable™ specialists, and in-depth resources, you'll be able to offer your clients comprehensive, personalized advice.

CPA Alliance referral program

We understand you don't make referrals lightly. It takes time to build your reputation and develop trusting relationships with your clients.

This is why we put the client first in everything we do. We know that the success of our CPA Alliance program is tied to how we partner with you in support of your clients' goals and objectives.

You can count on our experienced teams to pay close attention to the tax implications of financial planning decisions. We understand that proactive, integrated tax planning is essential for a successful wealth management plan. We will collaborate with you throughout the client's relationship cycle to ensure that their tax and wealth management strategies align.

Why Wealth Enhancement?

As a nationally recognized financial services firm, Wealth Enhancement has vast experience and resources, with offices and advisors across the country.

> **Each advisor is backed by our Roundtable™ Team of knowledgeable specialists, who can address all areas of financial planning, no matter how complex.**

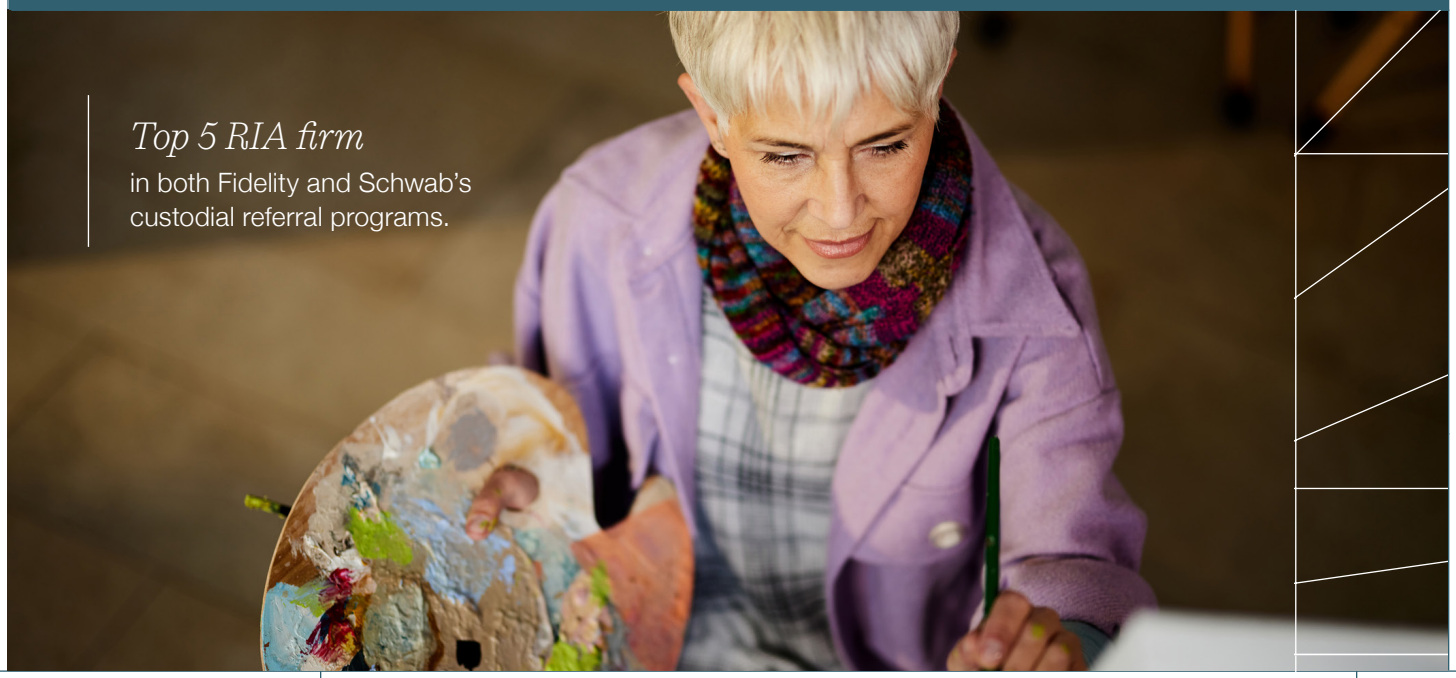
We have the scale, structure, and capability to successfully manage this referral opportunity. As a top 5 RIA firm in both Fidelity and Schwab's custodial referral programs, we have a proven track record of success in this space.

With the acquisition of Marcum Wealth, we gained 18 years of experience and knowledge working with CPA partners.

High fiduciary standards

Wealth Enhancement is a registered investment advisor (RIA) and fiduciary, meaning we are required to act in the best interests of our clients. This aligns with increasing regulatory expectations across the financial services industry.

Collaborating with an RIA can help ensure that referrals and business practices meet high ethical standards.



Benefits for CPAs

By working with us, you will be able to:

- Generate a new revenue stream
- Expand your service offering and broaden your value proposition
- Work with experienced professionals who put the client first in all they do
- Increase client retention and growth
- Build stronger and deeper client relationships
- Attract and retain talent
- Focus on what you do best

Benefits for clients

Your clients will benefit from:

- A simplified wealth management experience with one trusted team
- Coordinated proactive planning that will leave them organized, empowered, and in control
- Integrated financial services and comprehensive advice
- Wealth preservation plans designed for tax efficiency
- More time to focus on their priorities
- Access to specialized investment strategies
- Professional guidance for even the most complex situations

Expanded services = added value

Your clients will have access to a full suite of wealth management services including, but not limited to:

- Customized wealth management services and strategies
- Comprehensive advanced planning
- Trust and estate planning
- Tax planning
- Investment management
- Risk management and insurance
- Cash flow management
- Wealth transfer planning
- Unique investment opportunities
- Family Office services



Trust services offered through Wealth Enhancement Trust Services, LLC, a trust company chartered under South Dakota law.

Tax services offered through Wealth Enhancement Tax & Consulting Services, LLC, a wholly owned subsidiary of Wealth Enhancement Group®.

Referral program structure

We know how much trust your clients place in you — and we want to help you extend that same level of care across all aspects of their financial lives.

When you see a client who could benefit from comprehensive wealth management — whether that's investment advice, tax efficiency, or estate planning — we will meet with you and your client to see if we're the right fit.

If the client decides to work with us, we share a portion of the wealth management fees with your firm as a way to thank you for the partnership.

It's a partnership that supports your clients' success while creating an additional, recurring income stream for your firm.

How can you find out more?

To learn more, contact us at CPAAlliance@wealthenhancement.com

Wealth Enhancement®

Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor.

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