The Advisor & Accountant Collaboration Playbook

How to Build Accountant Partnerships That Deliver Qualified Introductions Year After Year

ELITE™
RESOURCE TEAM

Why Accountant Collaboration Is Your #1 Growth Lever

Few professionals command more trust from business owners and high-net-worth individuals than their accountants. These relationships often span decades and are rooted in the most sensitive areas of a client's financial life: income, taxes, business structure, and succession.

For financial advisors, that trust is the asset. When an accountant introduces you to a client, you're not starting from zero. You're entering an existing relationship with a warm, qualified endorsement.

"The most successful advisors don't try to be experts at everything — they become expert connectors who know exactly who to call for specialized client needs."

— Anton Anderson, Co-Founder, Elite Resource Team

THE NUMBERS TELL THE STORY

- **82%** of accountant meetings within the Elite Resource Team's Partnership Fast Track program lead to a signed engagement
- **81 Days is the average** time from start of training to the first signed accountant agreement

Some advisors occasionally get referrals from accountants. But a true accountant partnership that is structured, systematic, and built on mutual value, is a fundamentally different thing. A structured partnership generates consistent, qualified introductions month after month, year after year.

> ***It's the difference between catching rain in a cup and installing a pipe.***

The challenge isn't that accountants don't want to collaborate. It's that most advisors approach the relationship wrong by leading with products, asking for referrals, or offering nothing of value in return. This playbook shows you a better way.

What Accountants Actually Want From You

Before you can build a productive accountant relationship, you need to understand what they're trying to solve. The accounting profession is changing rapidly because compliance work is being commoditized, clients expect more proactive guidance, and many accountants feel pressure to offer advisory services they're not equipped to deliver alone.

WHAT ACCOUNTANTS ARE LOOKING FOR:

A Trusted Financial Partner — Accountants see the full picture of a client's financial life. They want to partner with someone they're confident will take care of that client, and reflect well on them.

Expanded Value for Their Clients — When you bring Virtual Family Office specialists to the table, accountants can suddenly say "yes" to complex planning conversations they'd otherwise have to turn away.

Revenue Opportunities — Advanced planning engagements like tax strategy, retirement plans, exit planning...these generate fees for the accountant. That's a compelling incentive.

A Defined Collaboration Process — Accountants are process-oriented. They don't want vague partnership promises. They want to know exactly what happens when they make an introduction.

WHAT YOU BRING TO THE TABLE

The Virtual Family Office model gives you something concrete to offer. Through Elite Resource Team’s (ERT) Virtual Family Office of 75+ specialists, you can help accountants deliver comprehensive planning across 5 areas:

- Tax Planning
- Wealth Management
- Risk Mitigation
- Legal Services
- Business Advisory

The advisor doesn’t need to be an expert in any of these specific areas because the Virtual Family Office gives access to the specialists across each discipline.

It works with a Client Information Questionnaire (CIQ) to surface hidden opportunities, then a proven 3-meeting engagement process for joint client meetings, and finally revenue sharing on planning fees.

The 5-Step Accountant Collaboration Process

This isn't networking. It's a systematic approach to identifying the right accountants, earning their trust, and building relationships that generate qualified introductions for years to come.

Identify - Not every accountant is the right fit. Look for small to mid-sized firms (1–15 professionals) serving business owners and affluent individuals. The ideal partner has been in practice 5–15 years, has strong direct client relationships, and shows openness to advisory work beyond compliance.

Contact - Lead with value, not a sales pitch. Your first outreach should offer something genuinely useful like a planning insight, a relevant resource, or an observation about how your services complement theirs. Use 5–7 touch points across email, LinkedIn, and phone over several weeks.

Engage - Three structured conversations do the work: the first qualifies mutual fit; the second educates the accountant on how the collaboration actually works day-to-day; the third establishes clear commitments and launches the relationship. ERT attends these meetings with you and leads the conversation.

Monetize - When the accountant introduces a client, include the accountant in the first meeting whenever possible. Use the CIQ to surface planning opportunities together. Convert those opportunities into engagements using VFO specialists. You keep 100% of AUM, planning, and insurance revenue.

Maintain - The difference between a one-time referral and a decade-long partnership is consistent maintenance. Schedule weekly or biweekly meetings. Provide value beyond introductions: share tax updates, co-host client events, make introductions that benefit the accountant. Revisit your agreement quarterly.

5 Mistakes That Kill Accountant Partnerships

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1

Leading with Products

If the first thing you mention is an investment product or annuity, the conversation is over. Lead with planning value and education.

2

Asking for Anything Too Early

Trust is built over multiple conversations. Asking for introductions in Meeting 1 signals you're after their client list, not a genuine collaboration.

3

No Defined Process

Vague partnership agreements produce vague results. Accountants need to know exactly what happens when they make an introduction.

4

Letting the Relationship Go Quiet

Life gets busy. Without scheduled weekly or biweekly touchpoints, even strong partnerships drift. Consistency is what separates a partner from a contact.

5

Trying to Out-Expert the Accountant

You don't need to know tax law better than they do. Your role is to be the connector who brings the right VFO specialists to the right situations.

How Partnership Fast Track Takes You Through Every Step

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Knowing the process is one thing. Executing it confidently, especially in those early accountant meetings, is where most advisors stall. That's exactly what Partnership Fast Track is designed to solve.

This is a done-with-you program, not a course you take and figure out on your own. From the moment you enroll, ERT works alongside you through every phase:

#1 Finding the Right Accountants

ERT helps you identify ideal candidates, typically small to mid-sized firms serving business owners and affluent individuals, so you're not wasting time on relationships that won't produce results.

#2 Reaching Out the Right Way

You receive proven outreach templates, email scripts, and phone guidance built specifically for this context. The goal is to get in front of accountants as a genuine collaborator, not another advisor looking for referrals.

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#4 Converting Introductions into Revenue

Once the partnership launches, ERT helps you navigate the joint client meetings, use the CIQ effectively, and bring in the right VFO specialists so introductions actually turn into planning engagements and revenue.

#5 Keeping the Partnership Active

You'll have a dedicated Member Success Manager who holds you accountable, checks in regularly, and helps you troubleshoot when the relationship slows down or you're unsure of the next move.

Example Deals of Using a VFO

BUSINESS OWNER TAX STRATEGY

Client: Husband & wife business owners with $400K–$500K business income

Approach: Advisor used the CIQ to identify tax planning opportunities, then introduced a VFO tax specialist to address entity restructuring, a defined benefit plan, and exit planning.

Advisor Result: $154,000 in planning fees + 3 referrals to similar business owners

Client Result: $400,000+ in tax savings with a clear roadmap for business exit

GOVERNMENT CONTRACTOR QUALIFIED PLAN

Client: $30M+ revenue government contracting firm with owners earning $800K–$2M

Approach: Advisor and an accountant jointly used the CIQ and brought in a VFO retirement plan specialist. They implemented a custom cash balance plan and restructured the existing qualified plan.

Advisor Result: $103,000 in planning fees (accountant earned the same) + ongoing AUM

Client Result: $460,000 in Year 1 tax savings; $4.2M over 9 years

FARM OWNER ESTATE PLANNING

Client: Successful farmer with significant land assets, limited liquidity, and estate tax exposure.

Approach: Advisor and accountant ran a joint CIQ meeting and brought in a VFO estate specialist who coordinated two additional specialists to build a comprehensive solution.

Advisor Result: $137,000 in planning fees with an ongoing annual review relationship

Client Result: $20M life insurance policy with no out-of-pocket cost; comprehensive succession plan

Ready to Build Your First Accountant Partnership?

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ERT's Partnership Fast Track program helps you secure a signed accountant agreement within 90 days...with our team attending every meeting. Each accountant partnership is designed to bring you new client introductions on a consistent basis.

Learn more at https://elitert.com/partnership-fast-track