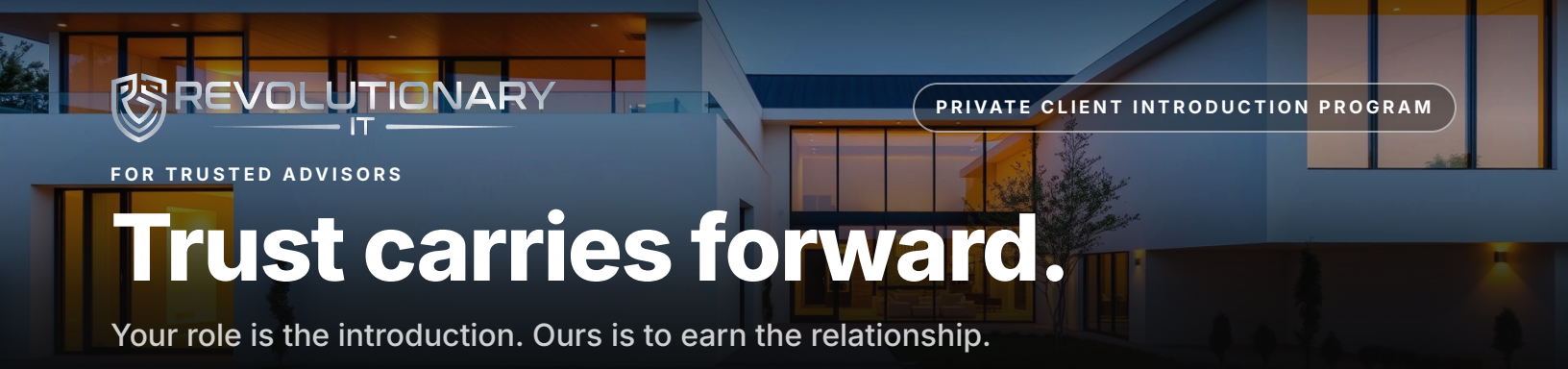


REVOLUTIONARY IT

PRIVATE CLIENT INTRODUCTION PROGRAM

FOR TRUSTED ADVISORS

Trust carries forward.

Your role is the introduction. Ours is to earn the relationship.

A discreet introduction program for trusted advisors who serve families, principals and private enterprises. When a client needs help with private technology, cybersecurity or security infrastructure, connect them with one accountable partner for the whole environment. We coordinate with the other providers and follow a problem across a boundary instead of stopping at it.

15%
of collected recurring monthly service revenue, paid to the advisor while the client remains active

30 min
first discovery discussion with David, booked online or by phone

Signed
agreement before any paid introduction, with disclosure to the client where required

WHO WE SERVE

Families, principals and the firms that serve them

Family offices
Office technology, residences, principals, staff and trusted providers in one clear picture.

Private clients
The devices, accounts, networks and technology woven through private life, handled discreetly.

Professional firms
Wealth managers, law firms, physicians and dentists, with the confidentiality their clients expect.

SERVICES

What we take off your client's plate

Managed IT
White-glove management and support for endpoints, users, systems, vendors and day-to-day technology.

Cybersecurity
Layered protection, monitoring, endpoint and email security, and steady risk reduction.

Networks and cloud
Secure wired, wireless, cloud and remote-access infrastructure designed for reliability.

Security infrastructure
Surveillance, access control and integrated security technology for offices and private environments.

Backup and continuity
Resilient backup, recovery planning and continuity measures that reduce operational disruption.

Technology strategy
Practical guidance, lifecycle planning, standards, documentation and long-term stewardship.

THE REASONS

Why advisors introduce us

- Every introduction is treated as an extension of the trust you have already built.
- Clients work directly with our team, not a call center.
- Existing providers are welcome. We complement, coordinate or strengthen what is there, and say plainly what stays with specialist providers.
- Discretion is built into how we work, not added later.

DISCREET PROTECTION. ABSOLUTE CONFIDENCE.

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REVOLUTIONARY IT

PRIVATE CLIENT INTRODUCTION PROGRAM

Protect the relationship.

Respect the client. Respect the purpose of the introduction.

OUR WORD

Our commitments to you

An introduction is not an invitation for us to market to your client. We will:

- Respect the purpose of the introduction.
- Protect the referring relationship and the client's confidentiality.
- Recommend only what fits the client's actual needs.
- Never sell client information.
- Reflect well on the person who made the introduction.

> Discretion in practice: we use appropriate channels and share only the information the work needs.

HOW IT WORKS

Three steps

1. **Ask permission**
   Confirm the client would welcome a connection.
2. **Connect directly**
   Introduce the client to David with a brief note on what prompted it.
3. **Start with a private technology review**
   A 30-minute discovery discussion leads to a private review of people, providers, devices, accounts, networks and backup.

PARTICIPATION

We pay advisors for introductions.

Choose one of two options under a signed agreement.

15%

Relationship participation

15% of collected recurring monthly service revenue for as long as the introduced client remains active, subject to the agreement.

First month

Or a one-time introduction fee

A one-time payment equal to the client's first collected monthly recurring service fee. Project, assessment and estate-build invoices are excluded unless the agreement provides otherwise.

- Payment requires an approved, signed Private Client Introduction Agreement before a compensated introduction is made, subject to applicable professional requirements and employer policies.
- Advisors confirm their eligibility with their own compliance function and, where required, disclose any compensation to the client in writing before the introduction.
- An advisor whose employer or regulator does not allow compensation can still make an introduction without it.

This overview is not a participation agreement or a commitment to pay. Eligibility, calculation, exclusions and payment terms are governed by the separate approved, signed agreement.



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Book a 30-minute discovery discussion