

Holistic Advisory Partner Program





Embrace the New Era of Bookkeeping

Welcome to Ascend's Partner Program, where bookkeeping meets modern methods. We've shifted beyond traditional approaches and embraced cloud accounting. Mobile and automation have transformed the industry, and now we're entering a new phase of hybrid models and seamless integration. Why stick to outdated practices? This program allows you to excel at your primary bookkeeping services while we handle the advisory and financial planning aspects. Imagine a scenario where your bookkeeping is part of an integrated system, providing comprehensive services without stretching beyond your main skills.

Explore how partnering with us can elevate your business and enhance your clients' success.

The world is integrated why aren't you?

The reality: Many bookkeepers and accounting professionals face several challenges that hinder their ability to offer holistic and integrated services to clients.



"Balancing competitive pricing with quality service is a constant struggle."



"We lose clients because we can't offer a full range of services."

"Attracting new clients in a saturated market is challenging."



"Keeping clients requires constant value addition and attention."





We're living in a new era

The landscape of accounting and bookkeeping has undergone a profound transformation

Bricks &
mortar



Cloud
accounting



Remote &
mobile



AI &
integration

This shift has changed our tools that we use and it's raised client expectations. They now seek partners who *truly* understand their world and offer integrated, *holistic* solutions beyond traditional boundaries.

Ascend Consulting's Holistic Advisory Partner Program is here to meet this new reality, enabling you to not only *keep up* but *lead* in this rapidly changing environment



“This new journey with Jacob has been quite remarkable, I have to say. We have really learned through the lens of what is a holistic approach to planning”

Sarah Prevost
Co-Founder
The Proper Trust LLC



Collaborative Roles



Ascend Holistic Advisory Offering



Our process is designed specifically to support bookkeepers like you. By tapping into the expertise of our interdisciplinary team across seven pillars, we ensure every aspect of your client's finances is carefully managed and aligned with their personal and business objectives.

Our services integrate these crucial areas, coordinating all essential elements of your client's financial landscape to match their core values and unique needs. This approach provides a cohesive strategy that supports you in delivering exceptional service to your clients, helping them achieve their goals while enhancing your role as a trusted advisor.

What clients say

If you want someone who can understand your situation quickly and give the exact steps you need to take -Ascend Consulting is your team.

”

“We walked out of our meeting and said ‘We will never even consider another business decision without sitting down with Jacob and having a talk like that.’ We really respect his opinions and put a ton of weight in the conversations that we have!”

”

“Highly recommend Ascend’s services and always brag to my small business owner friends about them. 10/10 recommend for your consulting needs!”

”

“In just 20 minutes, Jacob's tax expertise clarified weeks of uncertainty and saved me thousands!”

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A Bit About Ascend

Ascend Consulting was founded on the belief that accounting can be done better by focusing on people and relationships. Our team prioritizes empathy, curiosity, and integrity to build meaningful and lasting connections with our clients. We offer personalized guidance and support, always attentive to your unique circumstances.

By maintaining a longterm perspective, we provide proactive and thoughtful solutions. At Ascend, we are dedicated to helping our clients achieve their goals and build a prosperous future through our relationshipdriven and clientcentric approach.

Meet Your Advisors



Jacob Schroeder, CPA

A seasoned leader in the accounting industry and former member of the Intuit Accountant Council, Jacob transitioned from leading a bookkeeping and accounting firm to focusing fully on business advisory. He applies this experience to the relationships with bookkeepers to make sure clients feel like they have an integrated experience between the bookkeeper and their advisor.



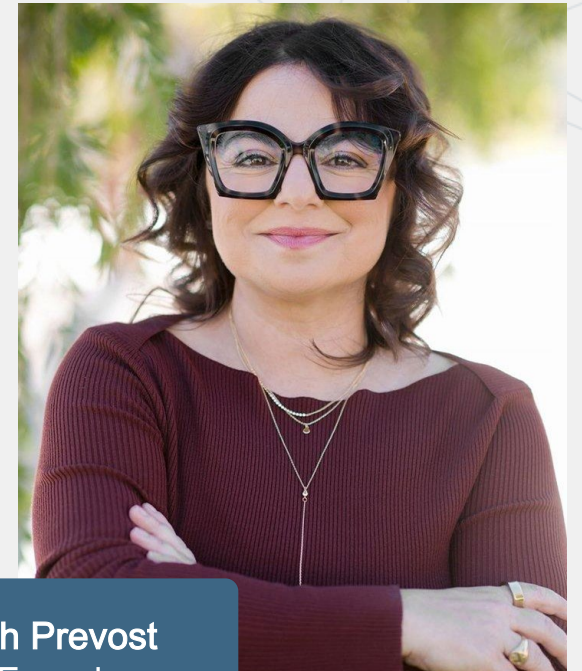
Obed Maurice, CFP, CPA

Canadian cloud accounting pioneer who successfully exited his bookkeeping and accounting firm into a larger traditional accounting firm before transitioning into a partner and advisor at Ascend. Obed brings the experience from both of these roles to make sure the bookkeeper advisor experience is strong while delivering an integrated experience to the client.

Why Bookkeepers Love Partnering with Ascend

Our partner program enhances your service offerings by providing access to our holistic advisory services. This allows you to offer your clients more value without extending beyond your core competencies. By partnering with Ascend, you can strengthen client relationships, increase client satisfaction, and grow your practice.

"It's really nice for us to learn from Jacob and the team, and also to look at the way we collaboratively plan to do things together, how we're going to support the client, and how the strengths of each team can raise the bar on each side with different knowledge and strategic points."



Sarah Prevost
Co-Founder
The Proper Trust LLC

Program Benefits



Access to Advisory Services

Partnering with Ascend means your clients benefit from our expert financial planning, tax planning, strategic business advice, and tailored legacy planning. This enhances your role as their trusted advisor and expands your service offerings effortlessly.



Harmonized Communication

We prioritize open communication, ensuring that you are included in all interactions with your clients. This transparency builds trust and ensures a unified approach to client management with a peace of mind



Smooth Integration

Our services integrate smoothly with your existing offerings, allowing you to provide a suite of services without disrupting your core operations. This collaboration ensures that your clients receive holistic support while you maintain your focus on what you do best.



Client Growth Drives Practice Growth

By partnering with Ascend to help your clients achieve their goals, your clients grow and their needs expand. As their needs grow the amount of services they need from you will grow, which drives expansion of your firm.



Better Client Retention

Partnering with Ascend allows you to continue serving clients who have additional needs beyond your scope of services. Without this partnership, these clients will begin to look for a larger firm who can handle everything for them.



Enhanced Value Proposition

Our program helps you stand out by providing solutions beyond bookkeeping. Elevate your clients' experience with our holistic approach, addressing both business and personal financial needs, ultimately driving client satisfaction and loyalty.

Teaming up with Ascend means unlocking a world of opportunities for your practice. As a partner, you'll tap into a diverse range of advisory services, providing your clients with unmatched value. From financial planning to legacy planning, business advisory, and outsourced CFO services, our program equips you with the tools and support to elevate your practice.



Partner Program Requirements

At Ascend Consulting, we value strong partnerships with bookkeepers. To ensure a successful collaboration, we have a few expectations for our partners. If these resonate with you, we would love to work together.



Engagement and Communication

Enthusiastic about regularly interacting with us to exchange and discuss key client information



Quality Control

Have a robust quality control system in place for your bookkeeping and accounting



Client Support

Committed to engaging and supporting the implementation of the client's business improvement plan

Who's a Good Fit?/What Client Makes sense?



Industry: Skilled Trades, Professional Services

Business: 3+ years, Revenue \$2M-\$20M

Age: 30-50, Wealth focused mindset



Goals

Short-Term: Gain clarity, reduce complexity, feel safer, save time

Long-Term: Freedom of time, money, relationships



Challenges: Getting out of the weeds, strategic alignment

Fears: Failure, disappointing others, costly mistakes, poor staffing

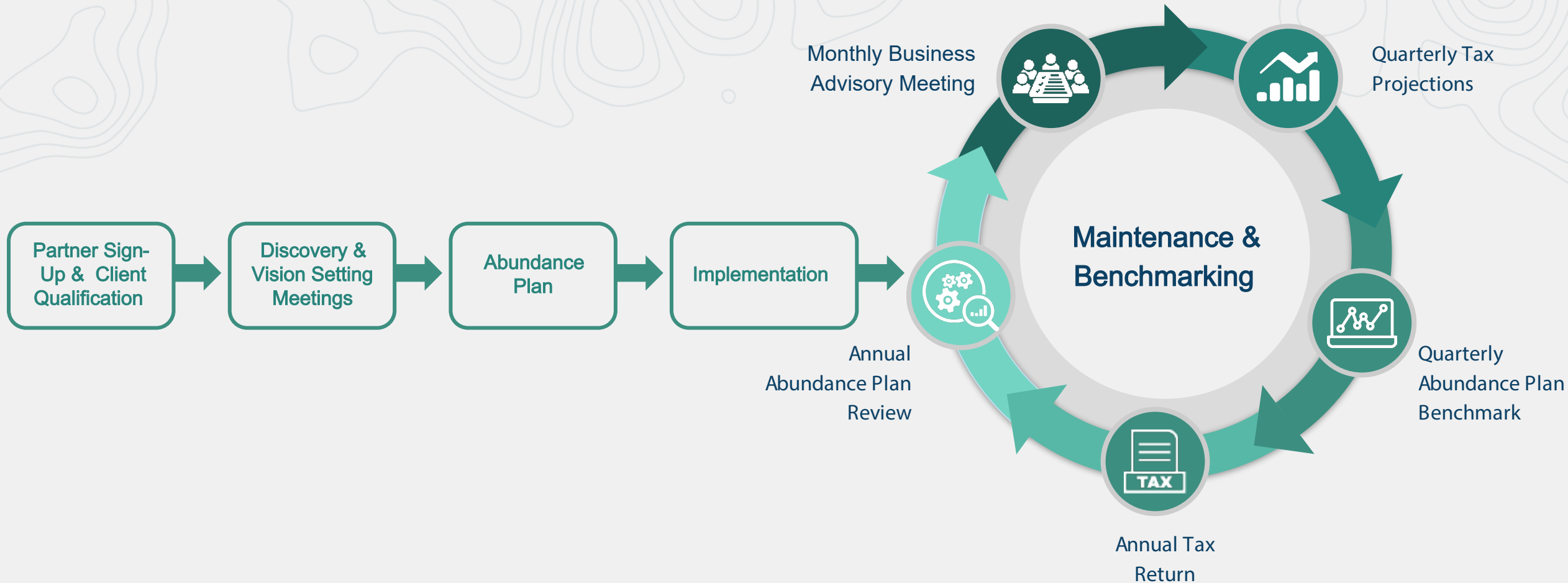


Client Expectations: Proactive advice, comprehensive planning, continuous support, fair pricing, timely responses



Transformation: Maximize financial potential, increase revenue, achieve work-life balance, gain clarity and confidence

Holistic Advisory Collaboration Process



Partner FAQ

What is an ideal client for Ascend?

\$2M-\$20m in revenue whose ownership has a wealth focused mindset looking to build their business in a way that allows them freedom on time, money and relationships.

What is stopping Ascend from taking my client?

Ascend is focused on being an advisory firm and as a result it does not offering bookkeeping services.

How do I ensure I am kept in the loop on what is happening with the client?

Ascend will include you in the meetings and emails we have with the client. Even if you choose to not attend a meetingly get wi call recording and transcript so you can stay up to date on things. In addition to that, we interface with you before we announ any items that would impact your bookkeeping to the client.

What is required of me as a partner?

- Enthusiastic about regularly interacting with us to exchange and discuss key client information
- Have a robust quality control system in place for your bookkeeping and accounting
- Committed to engaging and supporting the implementation of the client's business improvement plan

Ready to Get Started?

If you are interested in becoming a Partner with Ascend to provide unparalleled value to your clients, head to ascendllc.co to complete the sign up form.

Thank you for considering the Ascend Partner Program. We look forward to a successful partnership.