



EntrepreneursClub.ca

TURN CLIENT RELATIONSHIPS INTO ADVISORY REVENUE

The Accounting Firm of Your Future

**Your Clients.
Your Advisory Practice.
Our Support.**



for Accounting
Practices

What would more predictable revenue make possible for you?



More room to plan. More time for thoughtful client work. A practice that supports the life you want.

A defined, recurring advisory service gives you another way to grow through selected relationships you already have.

Start with what matters to you. Then consider how advisory could help you move toward it.

Build the practice you want. Help your clients build the businesses they want.

Your next opportunity may already be a client.

Some clients already turn to you for more than reporting and tax. They want help deciding what to do next.

Give those conversations a defined place.

A recurring advisory engagement creates regular time to connect the numbers with the owner's goals, decisions and actions.

The opportunity for your firm

- Build a recurring revenue stream.
- Deepen selected client relationships.
- Define a service clients can understand.

Start with selected clients. Build from the trust you already have.

From your client's numbers to the next step.



Compliance

What happened?

Establish the financial picture.



Advisory

What does it mean?

Understand performance and explore options.



Coaching

What should we do next?

Choose priorities and follow through.

Build on the financial understanding and client trust your firm already holds.

Your client's sales are growing. Why is cash still tight?

AN ILLUSTRATIVE EXAMPLE

You help an owner understand where cash is being absorbed. Together, you choose one priority and agree on an action.

At the next monthly meeting, you review what happened and decide the next step.

That is where insight becomes ongoing support.

The owner has a regular place to work through decisions. Your firm has a defined service to deliver, with a clear purpose for each conversation.

Your financial insight starts the conversation. A regular process helps carry it forward.

Your Plan. Put Into Practice.

The Trellis advisory platform connects the plan, the numbers and the conversations in one advisory process.

ANNUAL

Set the direction

Connect the owner's goals with the business priorities.

QUARTERLY

Choose the focus

Review progress and agree on what matters next.

MONTHLY

Keep moving

Use the numbers to guide decisions, actions and follow-through.

**A shared direction.
A consistent rhythm.
A reason to reconnect.**



Growth with a clearer shape.

Build advisory around the work you want your practice to do more of.

Recurring revenue

A defined ongoing engagement creates an opportunity for regular advisory fees.

Clearer expectations

An agreed scope and meeting rhythm help you plan the work and explain its value.

Deeper relationships

Regular conversations connect your financial expertise with what matters to the owner.

More value in the relationships you already have.

Advisory that fits your capacity.

You can develop coaching capability within your firm or work with Entrepreneurs Club on delivery.

Your firm delivers

Your team leads the coaching relationship with selected clients.

We support setup, training and implementation.

We deliver alongside you

Entrepreneurs Club provides the coaching in collaboration with your firm.

You remain the client's accounting advisor.

Choose how you want the service to work within your practice.

The Trellis advisory platform supports both delivery approaches.

You do not have to build it all yourself.

Entrepreneurs Club helps you establish and deliver the service. Trellis provides the platform and methodology.

Setup

Define the offer, delivery approach and a manageable starting engagement.

Training

Help the people involved learn the process and platform.

Coaching support

Develop useful conversations that lead to priorities and action.

Implementation

Work through practical obstacles and refine the service as you learn.

Support is shaped around the delivery approach and scope we agree with your firm.

A manageable start. Room to grow.

Imagine starting with selected existing clients, a clear service scope and a regular time to meet.

Each conversation builds on the last. You learn what preparation is needed, how the process fits your team and where clients value the support.

Start small.
Learn through delivery.
Refine before extending.

Whether you are introducing advisory or strengthening an existing service, build from where your practice is today.

**The starting point should fit your goals
and the capacity you have.**

What could advisory look like in your firm?

Use these three prompts to start a discussion about the opportunity.

What opportunity do we see?

Consider the recurring revenue and client relationships you would like to develop.

Which clients might benefit?

Think of owners who already ask for help beyond the numbers.

What support would we need?

Explore who would deliver the service and what would make the start manageable.

You bring the relationships. Let's explore the next step together.



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A CONVERSATION ABOUT YOUR PRACTICE

Let's Talk About Your Firm

**What would a stronger
advisory practice look
like for you?**



Explore recurring advisory revenue from your existing client relationships, with support to help you deliver it.

Let's discuss your **goals, delivery approach** and **capacity**.

Rodney Hough

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Business Growth Coach and Transition Advisor

Trellis-certified facilitator

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for Accounting
Practices

Prepare Early. Build Value. Create Freedom.