

Client Referral Scheme – FAQs

1) Who can I refer?

You can refer any business owner, company, or decision-maker who would benefit from proactive, high-quality accounting and advisory support. Ideally, they're ambitious, growth-focused, and value clear, trusted guidance.

2) What kind of client are you looking for?

We work best with:

- Owner-managed businesses – ideally between £1m-£50m turnover (i.e. not large PLCs/large multinationals)
- UK based (or at least in terms of their main operations)
- SMEs looking for more than just year-end compliance
- Entrepreneurs who want strategic advice as well as peace of mind
- Those open to regular conversations, not just once a year

3) What qualifies as a successful referral?

A referral becomes successful when your contact signs an engagement with us for either:

- An ongoing accounting and advisory package of at least £15,000 annually, or
- A one-off tax project worth £15,000 or more.

4) What do I receive if my referral qualifies?

If your contact signs up for either an ongoing annual accounting and business advisory package or a standalone tax project of £15,000 or more, you'll receive 5% off your own annual package with us. That's a meaningful saving just for pointing them our way.

5) When is the reward applied?

As soon as your referral becomes a signed client, we'll confirm your reward and apply the 5% discount to your monthly subscription for the following 12 months.

6) How do I make a referral?

Just email us at marketing@oldfieldadvisory.com with your contact's name and details or ask them to mention your name when they get in touch.

7) Can I refer more than one person?

Absolutely. There's no limit to the number of referrals you can make. If you know others who would benefit from working with us, we'd love to meet them.

8) What if my referral doesn't meet the minimum spend?

We'll still say thank you! It might not be in the way of a 5% discount on your annual package with us, but we always welcome and reward successful introductions and will take great care of them.

Still have a question?

We're happy to chat – just get in touch with your usual contact, or email us at marketing@oldfieldadvisory.com