ACCOUNTANT PARTNERSHIP FRAMEWORK

MarketingSteve works with accounting professionals to provide independent, commercially focused marketing advice to their clients. This Framework outlines the principles and commitments that guide these relationships, providing accountants with confidence when referring clients for specialist marketing support.

1. Respecting Client Relationships

- MarketingSteve recognises the trusted relationships accountants have established with their clients and is committed to respecting those relationships.
- Referrals are approached as an opportunity to complement the accountant's existing advice, not replace it. Clients remain free to choose their professional advisers and engage marketing providers independently.

2. Independent Professional Advice

- MarketingSteve seeks to provide impartial marketing advice, guided by professional judgement and the client's commercial interests.
- MarketingSteve does not accept supplier commissions or other incentives that could compromise the independence of its recommendations. Services are delivered with due care and skill, within the scope of MarketingSteve's professional expertise.

3. Confidentiality and Communication

- MarketingSteve respects the confidentiality of all client engagements and is committed to protecting information shared throughout the relationship.
- Communication, collaboration, and information sharing between MarketingSteve and the referring accountant will be tailored to each individual arrangement, taking into account the preferences and circumstances of both the client and accountant.
- Any sharing of confidential client information will be subject to appropriate client authorisation and applicable privacy and confidentiality obligations.

4. Referral Benefits and Pricing

- Clients referred by an accountant may receive complimentary consultations or support during the initial engagement, as outlined on the MarketingSteve website.
- MarketingSteve offers eligible clients of referring accounting firms the opportunity to price-match the firm's standard 30-minute and 60-minute consultation rates. Price-matching is agreed at the

point of engagement, with the agreed rates fixed for six months or until the end of the financial year, whichever is later. Any price-matching beyond this period is discretionary.

5. No Referral Fees or Obligations

- MarketingSteve does not pay commissions, referral fees, kickbacks, or other incentives to accountants for introducing clients.
- There are no minimum referral requirements, exclusivity arrangements, or financial obligations associated with referring clients to MarketingSteve.

6. Responsibility for Client Engagements

- MarketingSteve engages directly with referred clients and assumes responsibility for delivering its agreed services. All services are governed by the applicable MarketingSteve client service agreement and agreed scope of work.
- Referring accountants are not liable or responsible for MarketingSteve's services, fees, recommendations, or outcomes, nor are they parties to these engagements unless explicitly agreed.

7. Framework Status and Amendments

- This Framework is a statement of MarketingSteve's current professional commitments and referral practices. It does not establish a legal partnership, joint venture, or agency relationship.
- This Framework may be amended, replaced, or withdrawn at any time without individual or advance notice. Changes apply prospectively once published, and do not alter existing client service agreements or agreed fees.