

PARTNERSHIPS

Partnership Application

Referral · Consultant & Firm Co-delivery · Technology

Thank you for your interest in partnering with Grant & Graham. We work with professionals, firms and platforms that share our standard of quality, and this form gives us what we need to have a useful first conversation with you.

It takes around 15 minutes. Complete Sections 1 to 3 and 7, then only the section that matches the partnership model you are exploring (4, 5 or 6). If you are exploring more than one model, complete each relevant section. Where a question does not apply, write N/A.

How to submit

1. Complete the form in Adobe Acrobat Reader, Preview or any PDF reader that supports form fields.
2. Save the completed file as GG_Partnership_Application_[YourOrganisation].pdf
3. Email it to partnerships@grant-graham.co.uk with the subject line Partnership Enquiry
4. We reply within five working days and arrange a 30 minute scoping call with Andrew or the relevant regional partner.

The three partnership models

01 Referral

For accountants, lawyers, coaches, M&A advisors, wealth managers, recruiters and investors with trusted client relationships. Introduce a client; we qualify, scope and manage the engagement. Commission is paid on invoice settlement.

02 Consultant & Firm Co-delivery

For boutique consultancies, specialist firms and senior independents who want to co-deliver larger mandates. Dual brand, white label or reverse white label, with revenue shared on contribution under a Master Collaboration Agreement.

03 Technology

For platforms and services that Grant & Graham could use internally and recommend to clients setting up or scaling, with preferred rates or signup incentives passed through to clients.

Confidentiality. Information you share is used only to assess and set up the partnership. Mutual NDAs are standard and are signed before any client data is shared in either direction. No partner relationship requires disclosure of your other clients or engagements.

1. Partnership Model

Tick every model you would like to explore.

- ☐ Referral partner
- ☐ Technology partner
- ☐ Consultant & firm co-delivery
- ☐ Not sure yet, happy to discuss

Applying as

- ☐ Individual practitioner
- ☐ Firm or organisation

How did you hear about Grant & Graham?

- ☐ Existing G&G contact
- ☐ LinkedIn
- ☐ Website
- ☐ Event or speaking
- ☐ Referral from a client or partner

Other, please specify:

Name of your G&G contact or introducer (if any)	
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2. Applicant Details

Your contact details and, where applicable, your firm's registration details.

Primary contact

Full name	
Preferred name / how you like to be addressed	
Role / title	
Email	
Phone (incl. country code)	
LinkedIn profile URL	
City and country	

Organisation

Trading name	
Full legal entity name	
Country of registration	
Company registration number	
VAT number (if registered)	
Registered office address	

Website	
LinkedIn company page URL	
Year established	
Number of staff / consultants (incl. associates)	

3. About Your Practice

Helps us understand where your work and ours overlap.

What your practice does

Two or three sentences on your services, typical clients and what you are known for.

Sectors you serve

- | | | |
|--|--|---|
| ☐ Aerospace & Defence | ☐ Banking / FinTech | ☐ Cyber Security |
| ☐ Education / EdTech | ☐ E-commerce | ☐ Legal / LawTech |
| ☐ Retail | ☐ SaaS | ☐ IT |
| ☐ AI | ☐ Telecommunications | ☐ Healthtech / Life Sciences |
| ☐ Energy & Utilities | ☐ Professional Services | ☐ Public Sector |

Other, please specify:

Geographies you cover

- | | | |
|---|--|---|
| ☐ United Kingdom | ☐ Netherlands / Benelux | ☐ Rest of Europe |
| ☐ United States / Canada | ☐ Middle East & Africa | ☐ Asia Pacific |
| ☐ Latin America | | |

Other, please specify:

Working languages	
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Typical client profile

- | | | |
|---|---|--|
| ☐ Startups | ☐ Scale-ups (post funding) | ☐ SMEs |
| ☐ Large corporates | ☐ Government / public sector | ☐ Investors (PE / VC / family office) |

4. Referral Partners

Complete if you are exploring the referral model.

Your profession

- ☐ Accountant
 ☐ Lawyer
 ☐ Executive coach
- ☐ Corporate finance / M&A advisor
 ☐ Wealth manager / family office
 ☐ Senior recruiter
- ☐ VC / PE investor

Other, please specify:

Client needs you see that Grant & Graham could solve

- ☐ Interim leadership (C-suite)
 ☐ Transformation / consultancy
 ☐ Growth as a Service
- ☐ Company formation
 ☐ Mergers & acquisitions
 ☐ New business development

Other, please specify:

Estimated introductions per year	
Typical client size (revenue or headcount)	

Preferred commission structure

- ☐ % of first engagement fees
 ☐ Recurring share over 12 months
 ☐ Open to discuss

A recent example

Without naming the client, describe a situation where you would have introduced Grant & Graham.

5. Consultant & Firm Co-delivery

Complete if you are exploring co-delivery of larger mandates.

Core capabilities

Service lines you would bring to a joint mandate, and where you are strongest.

Size of deliverable bench (senior / associate)	
Delivery countries / regions	
Indicative day rate range (currency)	
Availability for new mandates (e.g. from date, FTE)	

Brand presentation preferred

- ☐ Dual brand
 ☐ White label (your brand only)
- ☐ Reverse white label (G&G brand only)
 ☐ Decide per engagement

Relevant mandates

Two or three recent engagements: client type, scope, your role, outcome. Client names optional.

Certifications / accreditations	
Professional indemnity insurance (insurer, cover amount, expiry)	
Any regulatory or specialist licences	

6. Technology Partners

Complete if you are proposing a platform or service for Grant & Graham to use and recommend.

Product / platform name	
Category (e.g. banking, CRM, formation, HR)	
Pricing model	
Markets where available	

How Grant & Graham and its clients would use it

Referral / affiliate terms offered to G&G	
Signup incentive for clients	
Existing partner or affiliate programme link	

7. Fit, Expectations & Declaration

What you bring to the partnership

The kinds of clients, engagements or capability you are bringing to the conversation.

What you would like from Grant & Graham

Any potential conflicts of interest	
Preferred times / time zone for the scoping call	

Confirmations

- ☐ I confirm the information in this form is accurate to the best of my knowledge.
- ☐ I am willing to sign a mutual NDA before any client information is shared.
- ☐ I consent to Grant & Graham storing and processing these details to assess and manage this partnership, in line with its Privacy Policy.
- ☐ I am happy to receive the Grant & Graham partner newsletter (optional).

Name	
Position	
Signature (type full name)	
Date (DD / MM / YYYY)	

For Grant & Graham use only

Date received	
Reviewed by	
Model(s) confirmed	
Scoping call date	
Outcome / next step (NDA, agreement, MCA, decline)	