

Two Smith Capital Advisory Services

By Jeremy Smith



TWO SMITH
Payments™



TWO SMITH CAPITAL
REAL ESTATE™



Who Are We

We are a **full-service brokerage firm** located in Boston, Massachusetts, with locations across the United States.

We **assist our clients with finding capital** for their business needs **through SBA funding and non-conventional lending.**



What we Offer:

Advisory as a Service

This includes the following:

- Curated secondary capital market
- Monthly client capital reviews
- Monthly client webinars
- Financial literacy tools
- Monthly lending & credit counseling
- On-demand loan admin services



Our Value

For Your Clients

- Access to **SBA and non-bank capital**
- Access to **lending consultants**
- Access to **financial literacy tools** on demand

For Your Firm

- Reliable capital advisory partner
- Additional non-labor revenue source
- Additional Value-add for clientele retaining you for tax & other related services

How It Works

Step 1

- Provide us **access to 20-25 business files** monthly

Step 2

- Let us **review the eligible businesses** for capital

Step 3

- Let us **discuss the potential commissions** to be made on referrals

Step 4

- **Refer & endorse us** to these owners for capital

Step 5

- **We pay you referral commissions** at your clients loan closings



The Proposed Partnership

20% Revenue share on closing loan fees

\$5000.00 Quarterly management fee taken off gross revenue Share

Quarterly in-person follow-ups

1-Year client subscriptions to Two Smith IQ (our financial literacy tools)

On-site client manager after 3 quarters @ Two Smith Capital costs

Full documented transparency & accountability on client deal performance