

BREAKAWAY

Bring Joy to Accounting!

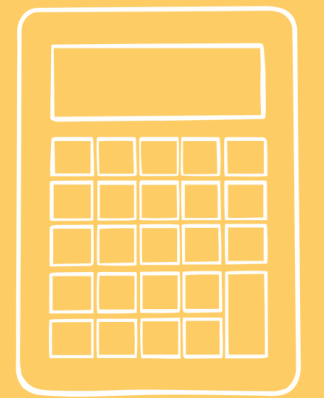


Accountants + CFOs: The Reality



"I love my clients, but don't really have the time to give them the insight they need."

"As an entrepreneur, I feel lonely and overwhelmed."



"I'm worried I can't have a business and a life."




"Marketing leaves me mentally burnt out and physically ill."



What if... You loved your job?

Breakaway Advisors are supported by the best in technology, a robust and vibrant community of peers, and a corporate structure that mitigates risk and gives them tools to thrive.

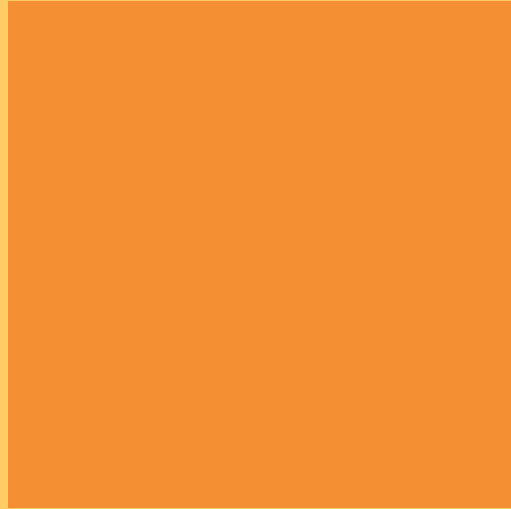




**"Working with
Breakaway means we
take care of the
marketing, sales, and
administrative tasks, so
you can focus on being
amazing for your clients
and making more time
for YOU."**

Kristen Keats
Founder





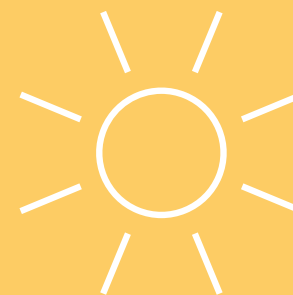
Why We're Different Our Advisor Community



**Online education &
community platform**



**Retreats, conferences &
summits**



**Personal & professional
development**



Why We're Different Our Technology

Our firm is tech enabled - which means we use the best cloud accounting and workflow technology to serve our clients and advisors. Never stale, we constantly test and troubleshoot to keep our tech efficient, streamlined, and current. This is just a sample of our robust tech stack!

BREAKAWAY



Fathom



FreshBooks



slack

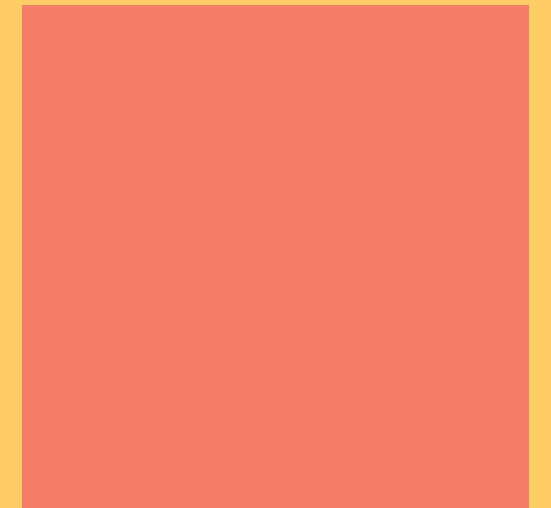
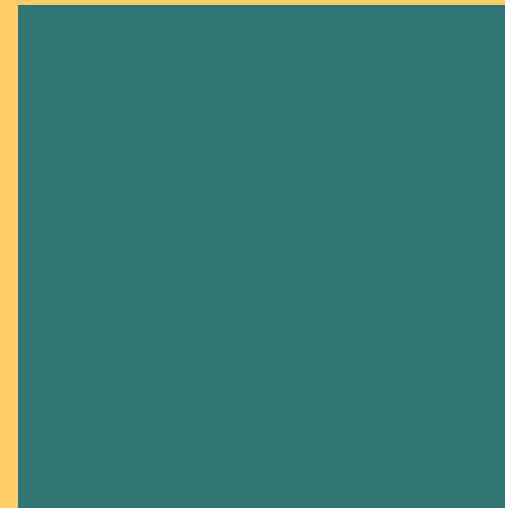
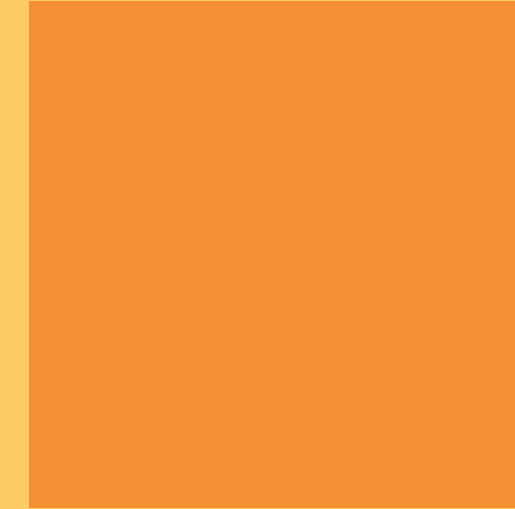
LastPass



zoom

Why We're Different Our Blended Shore Team

By utilizing a Blended Shore Team, we can do more, faster, while respecting everyone's time. We love our talented team and consider them an integral part of our community. We are proud to partner with teams in Guadalajara, Mexico and Coimbatore, India; as well as top-notch onshore independent contactors.



Why we're different Our Brand

Working by yourself means you are responsible for your own branding. This can be overwhelming and take time away from client work. At Breakaway, we provide a suite of resources that allows you to leverage the Breakaway brand and inject your own unique voice. Dedicated brand coaches from our Creative team mean you'll never stress over another LinkedIn post ever again.

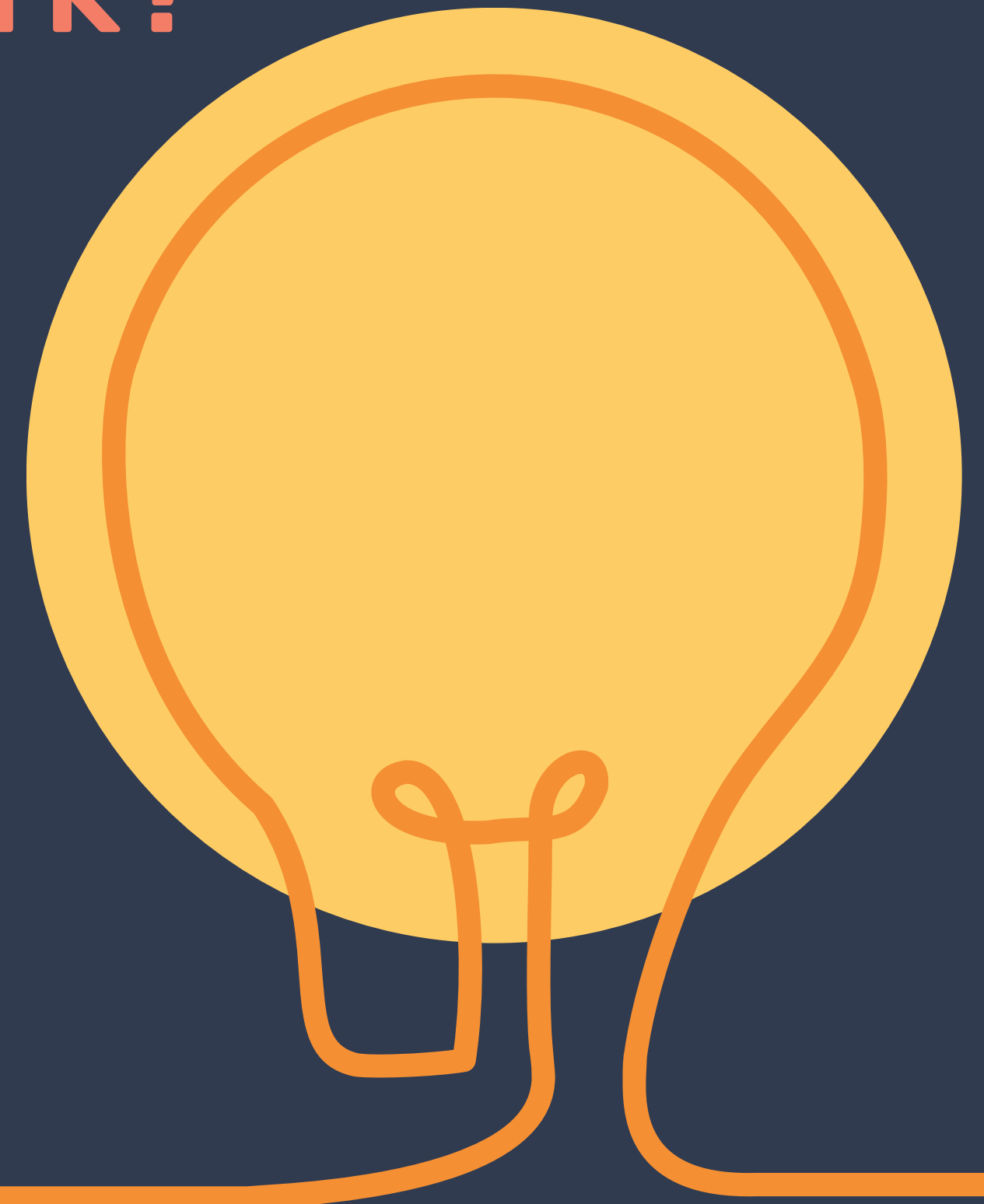


But...

How does Breakaway work?

Advisors operate under the Breakaway brand, enjoying both the **advantages of a large firm** and **all the pride and benefits of owning their own business**.

Autonomous and independent, they are free to identify their own clients, manage their own schedules, and run their business in the manner that best suits them.

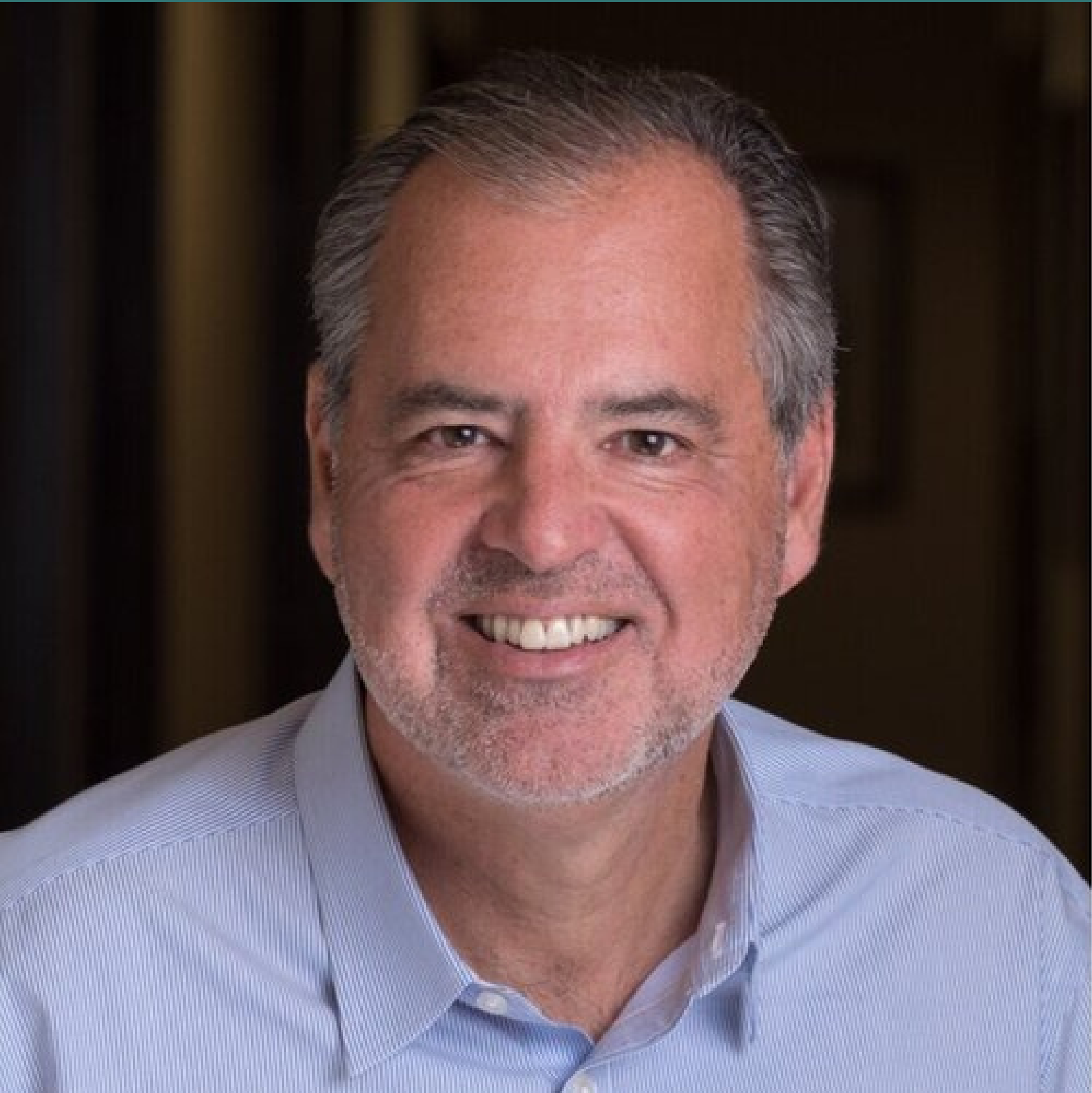




Tell Me More!

Breakaway

Breakaway advisors cover their own expenses and pay a set percentage of their gross revenue to Breakaway. In return, they are **supported via a curated tech stack, an advisor community, a dedicated HQ, and a highly trained and fully interpreted offshore team.** This affords them **extensive operational versatility** and **the freedom to scale their business at their own pace.**



"While we are steadfastly technology forward, we believe technology is only a means to the end - which is to be in front of our clients in a meaningful way. We are radically human."

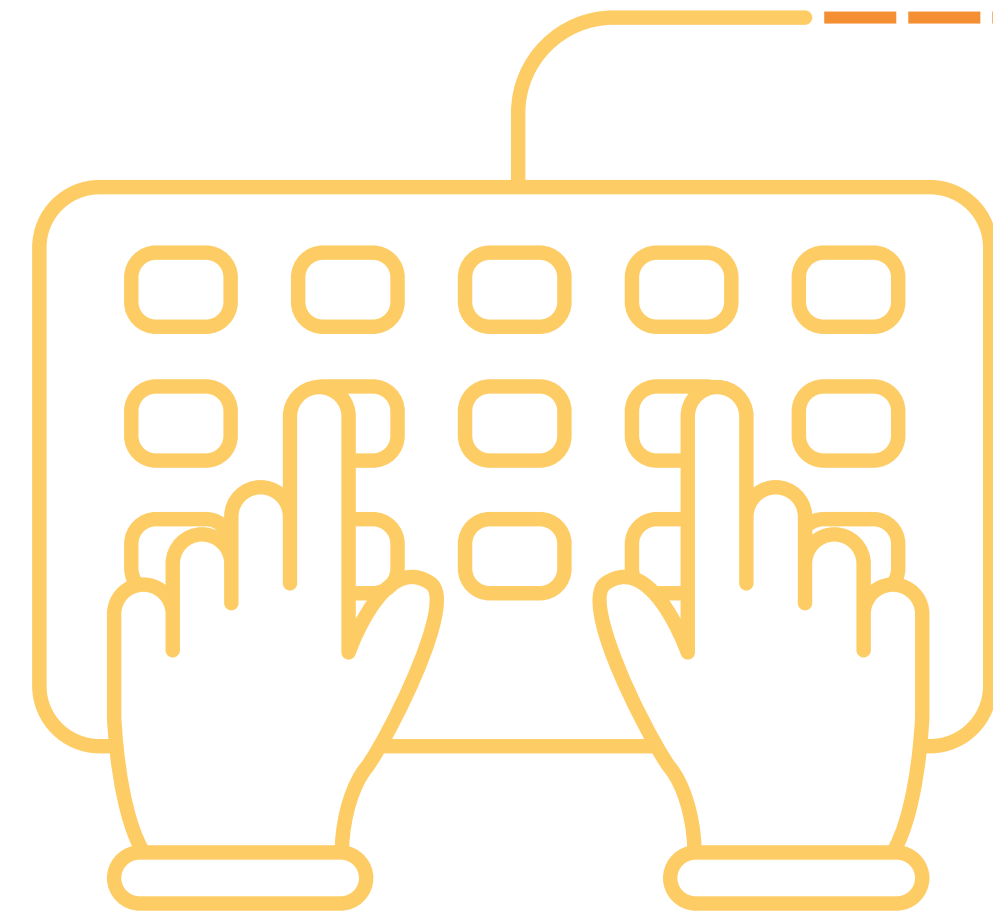
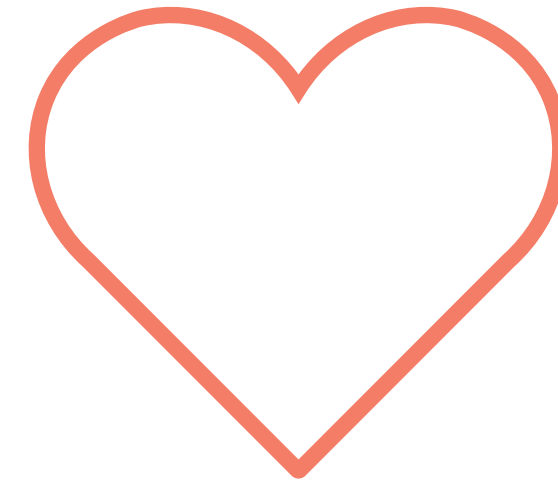
Martin Moll
Founder

BREAKAWAY

Advisor Benefits

Tech Stack & Dashboard

- Training, onboarding, and preferred parter/wholesale status with leaders in cloud accounting (Xero, QBO, Freshbooks)
- Benchmarking/Reporting/Client Insights (Fathom)
- Proposals & engagement letters (Ignition)
- Custom workflow templates (Asana)
- Ongoing tech review and recommendations across categories from HR to document management





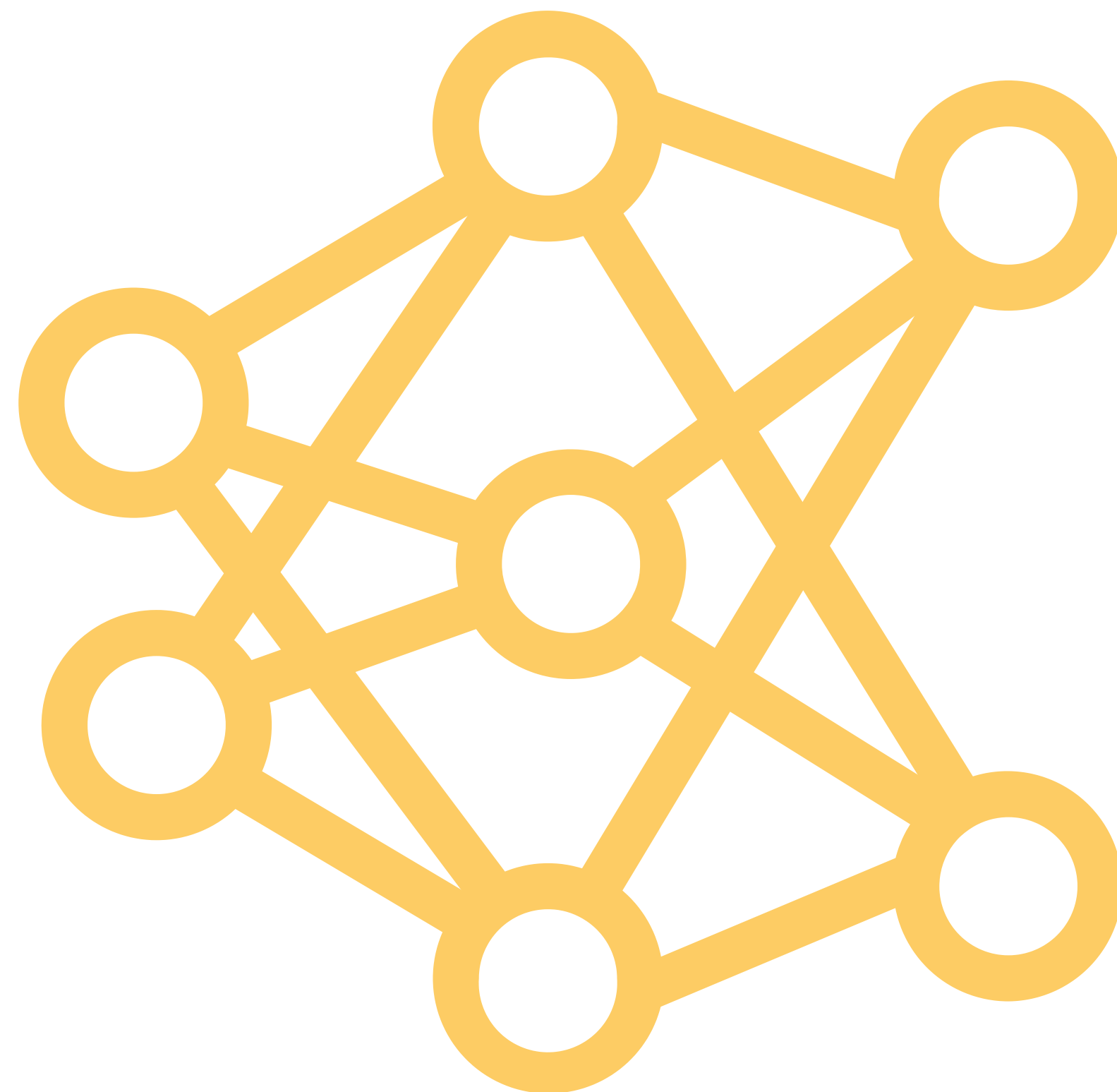
Financial Freedom



- **The ability to set compensation based on the size of your book and your unique skill set**
- **No restrictive covenant - if you no longer receive value from the organization, you can simply walk away with the clients who want to come with you**
- **You decide whether you want an office or to work remotely and what kind of marketing works best for your ideal clients**
- **The ability to “sell” your book of business internally**
- **On average, our advisors grow their books 50% faster than solo practitioners**

Community & Professional Development

- Annual Conferences
- Outreach/visits from Breakaway HQ
- Authentic connections to other Advisors
- Online Educational Platform & CPEs
- Online Advisor Community
- Preferred Provider Directory
- Specialty + Affinity groups
- 1:1 Executive Coaching





Marketing & Sales

- **Weekly marketing education**
- **Personal branding consulting**
- **Help with lead generation**
- **Blogs/Newsletters/Social Media**
- **Pricing consulting**
- **Marketing collateral (website, logo, and branding)**
- **On-call dedicated Sales & Marketing teams**

Infrastructure Support

- IT Security Protocols
- Regular phishing training
- Client engagement risk management
- Curated tech stack
- Tech support and training
- Robust professional and general liability insurance





Blended Shore Staffing

- **Bookkeeping**
- **Accounting**
- **Marketing**
- **Admin**
- **IT Support**

BREAKAWAY

Advisor Benefits Snapshot

Tech Set-up

Value

Asana Processes, Systems, and Training

\$3,500 +

Tech Partner Set-up + Onboarding

\$1,500 +

Professional Development & Community

Value

**Slack Channel, Online Community, Weekly Check-ins, Live Webinars
(Similar to a High-Level Mastermind)**

**\$10,000 +
Annually**

Online Educational Platform

\$5,000 - \$10,000

Executive Coaching

\$1,500 +

Marketing & Collateral Materials	Value
Website	\$4,000 - \$12,000
Branding Guide & Logo	\$3,500 - \$5,000
Graphic Design Assets	\$1,500 - \$2,000
Content (Blogs/Social Media/Newsletters)	\$2,500 + Monthly

Legal + Professional Services	Value
Engagement Letter / Terms & Conditions	\$5,000 +
General Liability / Professional / Cyber Security Insurance	\$15,000 +

Advisor Application & Onboarding Timeline




Learn about Breakaway. Wonder if it's the right choice for you.

Fill out your Advisor Interest Survey and Business Plan Questionnaire.

Meet with a Breakaway HQ team member. You'll get to know one another and see how you might be a part of BA.

If you are selected, you will receive an acceptance email with next steps. If you choose to move forward, a background check with commence.

Receive your franchise paperwork and begin your Breakaway journey!



"Overhead, HR, tech, insurance....what a headache. Breakaway allows me to focus on providing the best client experience without the burden of G&A issues"



Michelle Löpez
Founder, COO + Advisor



BREAKAWAY



We can't wait to get to know you! Here are a few more resources:

- Check our "[Get to Know Breakaway](#)." YouTube playlist, for a taste of Breakaway
- Review our [Leadership Principles](#) and [FAQ](#) for more details
- Fill out our [Advisor Interest Survey](#), so we can get to know more about you.
- Follow us on [LinkedIn](#).
- Still wanna learn more? Watch our interview with [Bookkeeping Side Hustle](#)

After your "Advisor Interest Survey" has been submitted, we will reach out regarding next steps within 48 hours.



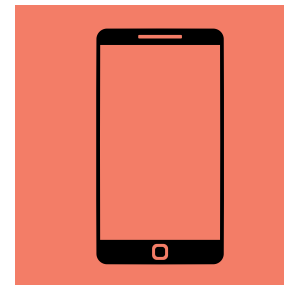
BREAKAWAY

Bring Joy to Accounting.

BREAKAWAY



**22467 SW Ash St, Sherwood, OR
97140, United States**



503-941-0888



info@breakawayba.com