Your client stays your client.

When a client needs numbers beyond your scope, introduce them to us. We build the models, reports and calculations. You keep the relationship and the advice.

Introduce a client

datadynamicsau.com/for/advisers
contact@datadynamicsau.com

The scope and fee are agreed with your client in writing before any work starts. A referral fee applies where your professional rules allow it.

What stays with you.

The relationship	The client remains yours. We complement your work and never compete with it.
The advice	We do not prepare tax returns or statutory accounts. We give no tax, legal or financial product advice.
The finance	We do not lend, broker or arrange finance. A lender pack goes to market through you.
The decision	Our work is the numbers. The client decides, with you.

Where we help.

Deals and property	Feasibility and acquisition models, and the credit paper a lender reads.
Businesses	A three-way model your client's team can run, with board and lender reporting.
Investors and family offices	One report across every adviser, platform and entity, net of fees.
Law firms and liquidators	Payroll underpayment reviews, proofs of debt and recovery analysis.

To introduce a client.

Send the client's name and email, and a line on what they need and when.
Copy the client in, so they know to expect us.

We do not give tax, legal or financial product advice, and we do not lend or arrange consumer credit.