ALPHA INNOVATION PARTNERS
NEXT GENERATION ADVISORS

The Professional Alliance Program

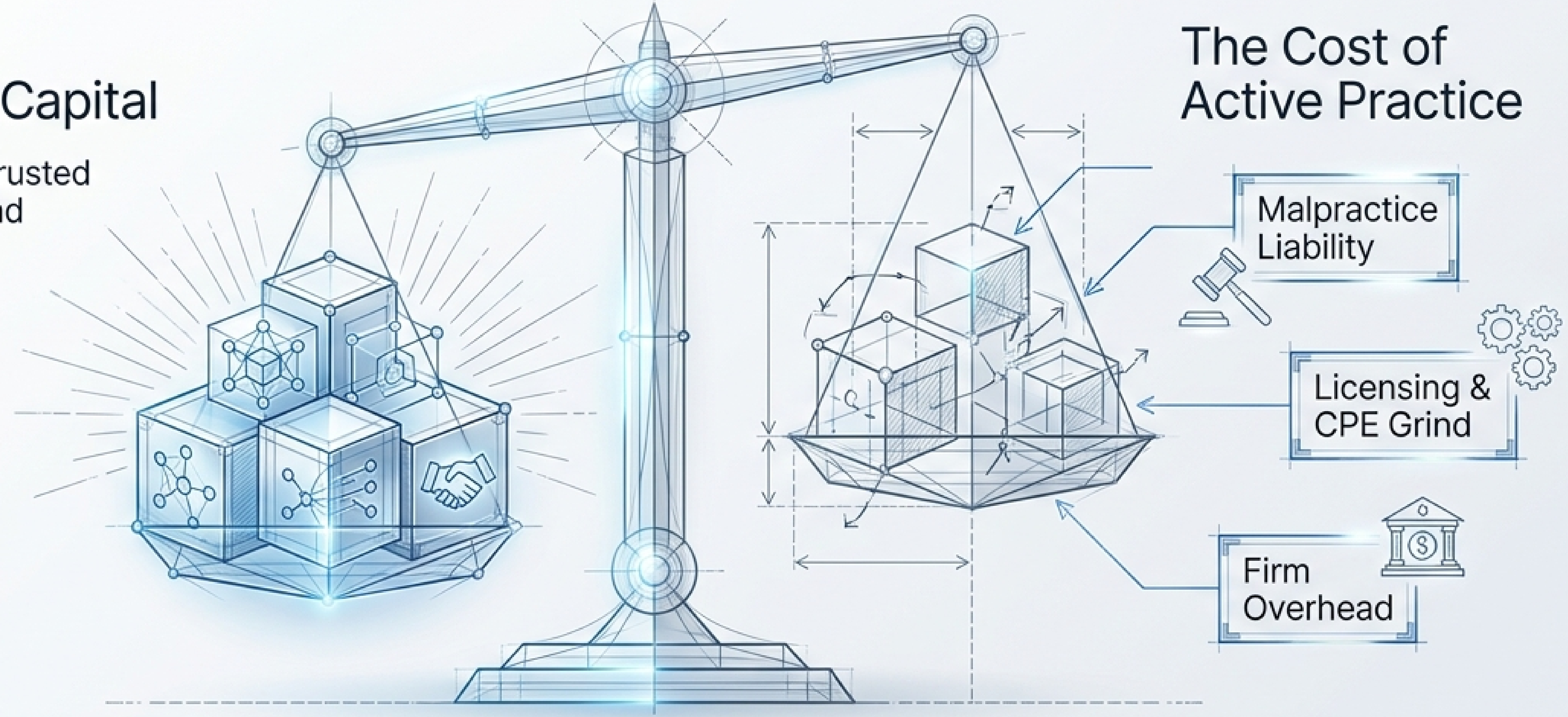
Strategic Wealth Monetization and Fiduciary Shielding for Retired CPAs.

The friction of a successful retirement

Lifetime of Intellectual Capital

Deep networks, trusted advisor status, and high-net-worth relationships.

The Cost of Active Practice



The transition into retirement shouldn't mean walking away from the value of your network. But capturing that value traditionally requires absorbing risk.

Engineering a new revenue stream through strategic partnership

AIP allows retired CPAs to monetize their post-career network through a formalized, fully compliant partnership. You provide the introduction; we execute the institutional wealth management.

Step into the role of the Financial Quarterback

Key Takeaways

1. No financial expertise or active licensing required.
2. Zero product pitching or carrier negotiations.
3. AIP handles 100% of the financial processing and operational execution.

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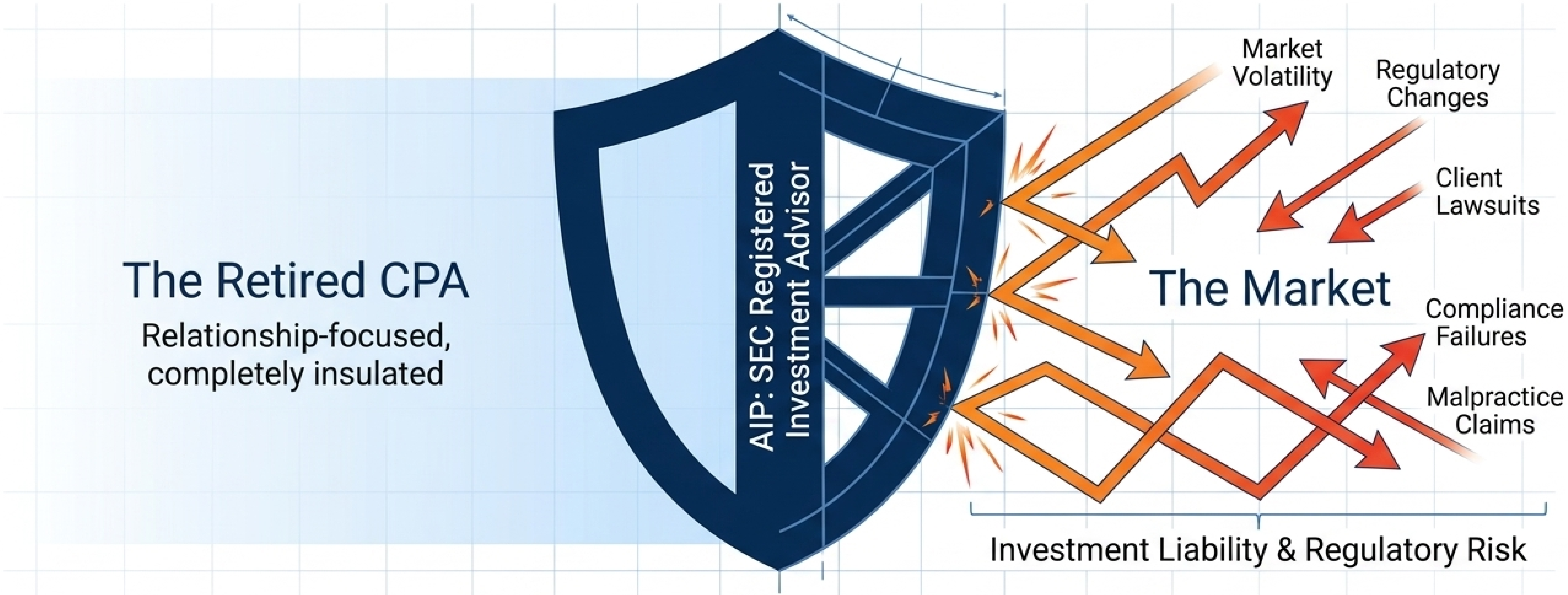
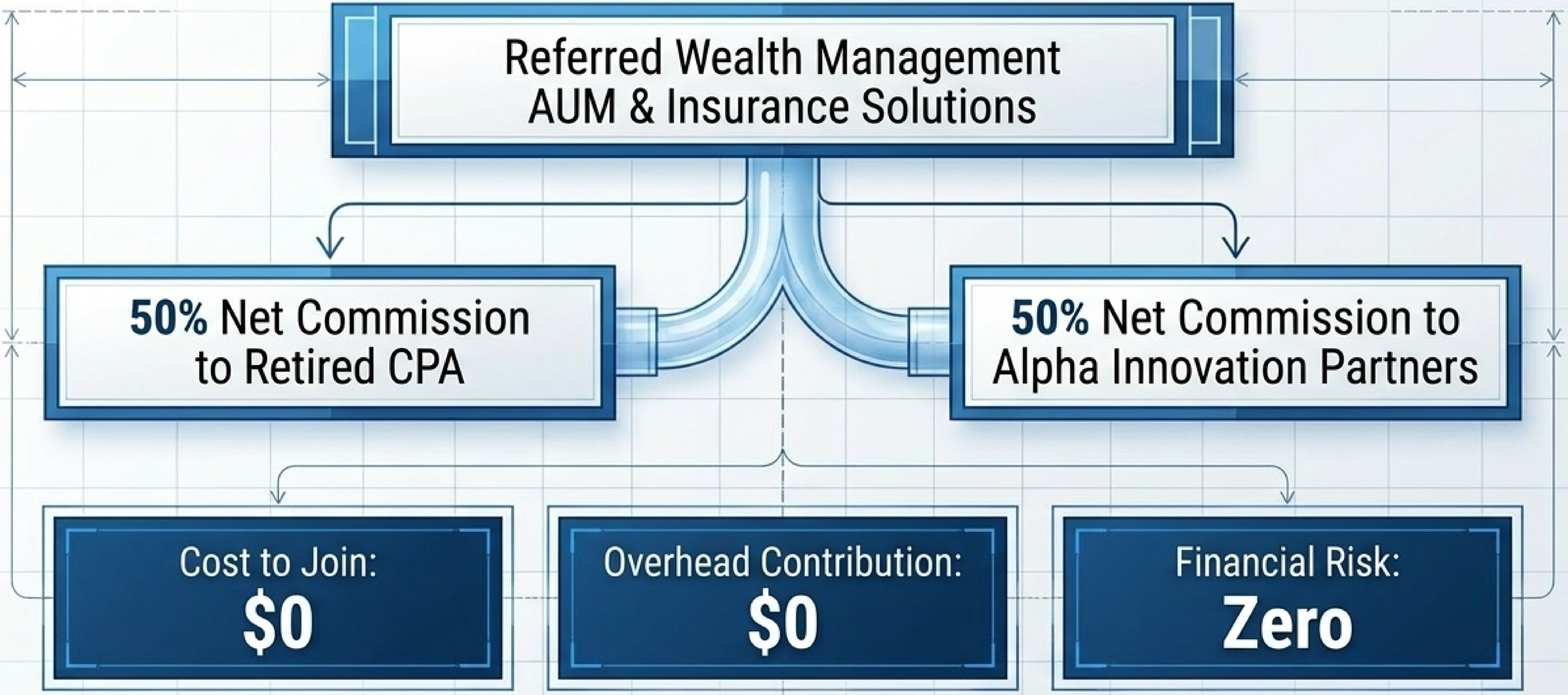
Absolute protection through Fiduciary Shielding



Protect your hard-earned reputation. As an SEC Registered Investment Advisor, AIP is legally bound to act solely in the client's best interest. We assume 100% of the ongoing investment fiduciary liability. You face zero legal or malpractice exposure.

Pure upside economics: **The 50/50 alliance**

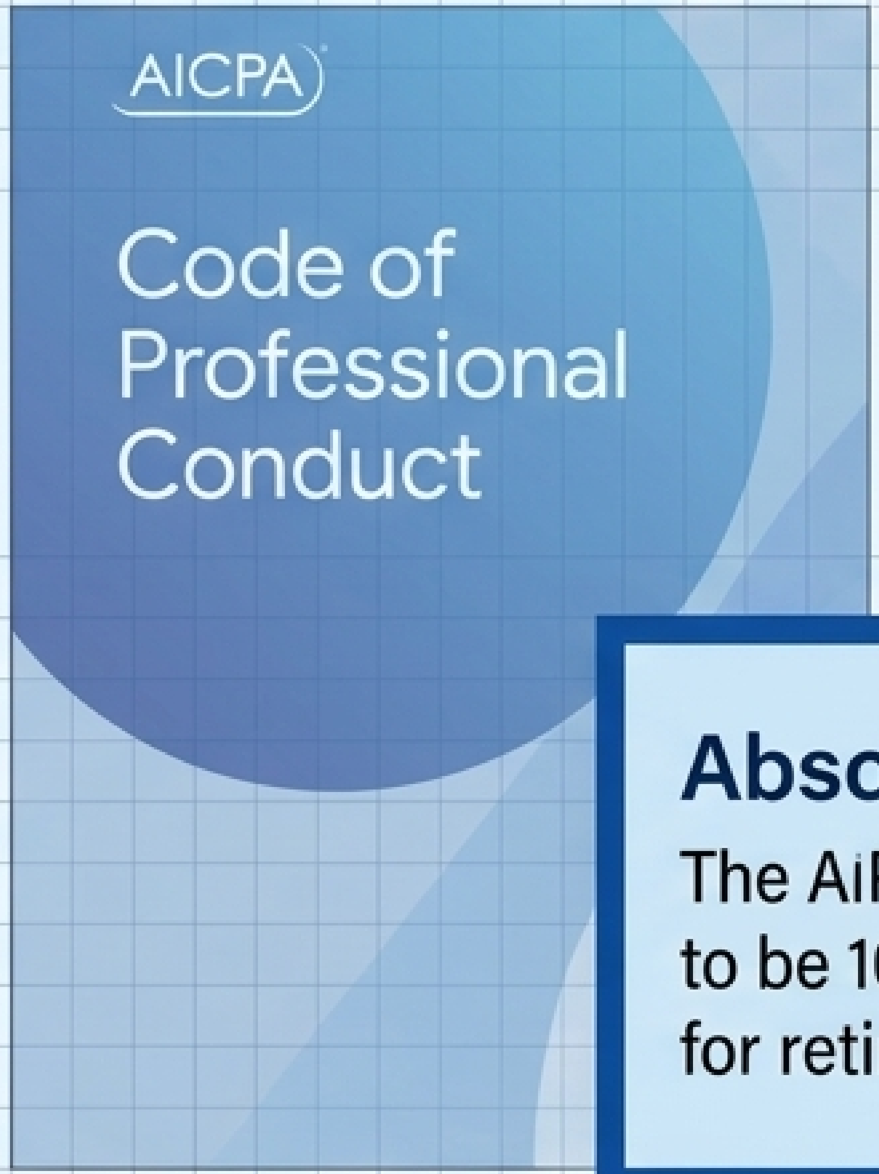


A straightforward, transparent financial model based purely on realized upside.

The optimal vehicle for post-career monetization

	Traditional Practice	AIP Alliance
Professional Liability	✗ High Exposure	✓ Zero (Fiduciary Shielding)
Operational Overhead	✗ High Cost (Staff, Tech, Insurance)	✓ Zero Cost
Licensing & CPE Required	✗ Yes (Mandatory Grind)	✓ No (Utilizes AIP's SEC Registration)
Revenue Generation	✗ Active, Billable Hours	✓ Passive, 50/50 Net Commission Split

Uncompromising alignment with AICPA Professional Ethics



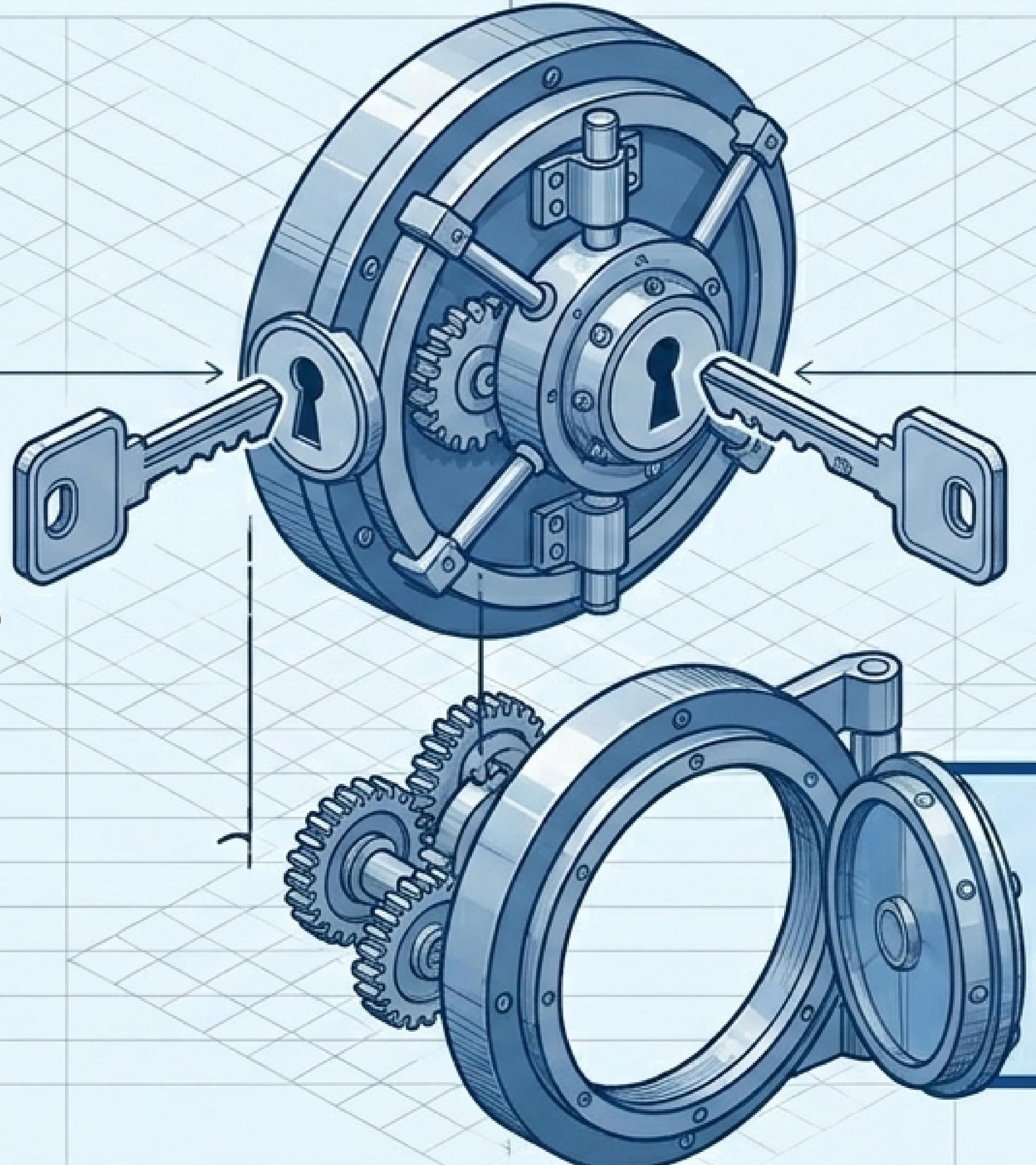
Absolute adherence to professional ethics.

The AiP Professional Alliance model is meticulously engineered to be 100% compliant with AICPA and State Board regulations for retired and inactive CPAs receiving referral compensation.

Demystifying ET 1.520.001 (Commissions & Referral Fees)

Key 1: Non-Attest Client

Because you are retired/inactive, you are legally restricted from performing attest/audit work, inherently fulfilling this requirement.



Key 2: Written Disclosure

A simple, transparent written disclosure is provided to the client. (AIP provides the exact, pre-vetted compliance templates).

The Result (Unlocked Vault)

Fully compliant, ethical commission and referral fee revenue.

A frictionless operational workflow

Step 1: Identify & Introduce

You spot a financial need within your existing network (e.g., retirement planning, liquidity event, legacy planning) and connect them to AIP.

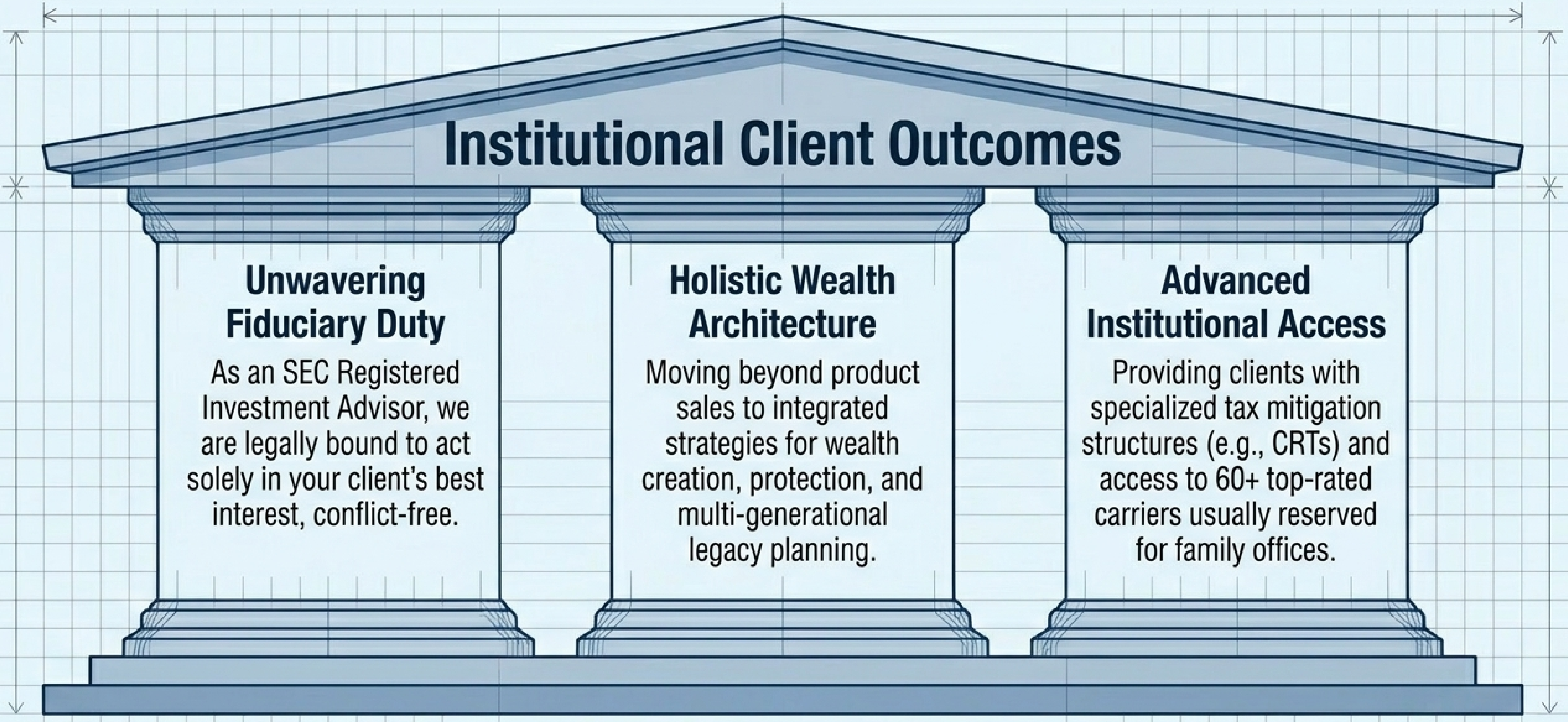
Step 2: AIP Executes

Our fiduciary team designs the wealth architecture, implements the institutional solutions, and assumes 100% of the ongoing liability.

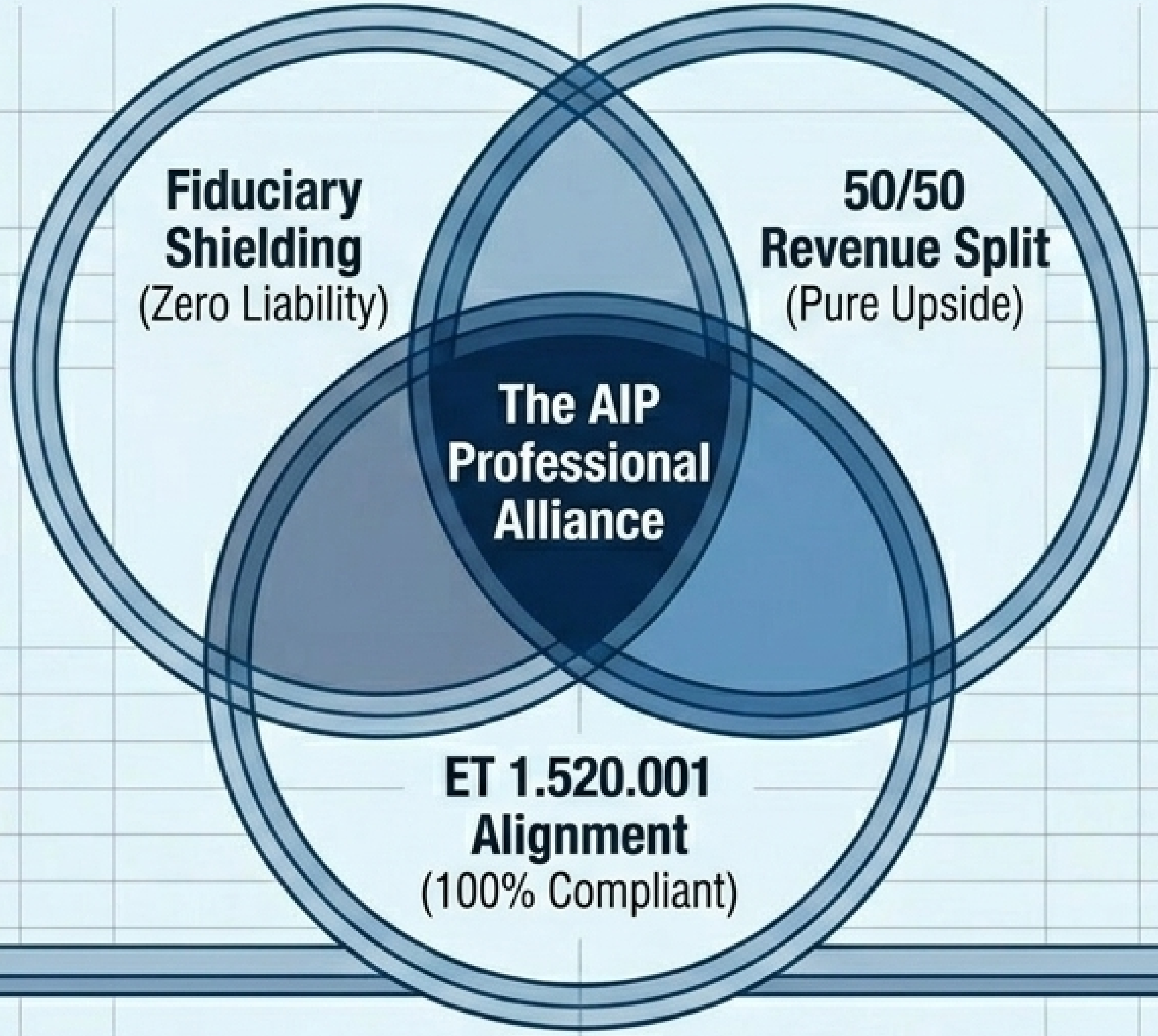
Step 3: Revenue Realized

The solution is implemented, and you automatically receive your 50% split of the net commission.

Elevating the standard of care for your network



The complete post-career ecosystem



Turn your lifetime network into a legacy income stream. The AIP Alliance allows you to deliver massive institutional value to your contacts while perfectly balancing economic upside with complete risk insulation.

Secure your financial quarterback role today

Let's discuss how this alliance seamlessly integrates with your specific retirement strategy.

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