



# BEYOND THE NUMBERS — WHY ACCOUNTANTS BENEFIT FROM REFERRING A COACH



# Introduction

As an accountant, you are often the first person clients turn to when financial stress hits. But sometimes the issues go beyond the numbers — into stress, decision-making, and strategy. This is where referring a trusted business coach adds real value to both you and your client.

## The Benefits for Accountants

- Protects client loyalty: You remain the trusted advisor by connecting them with extra support.
- Saves you time: A coach handles the emotional fallout so you can stay focused on the numbers.
- Strengthens your reputation: Clients see you as resourceful and solutions-focused.
- Reduces risk: Clients make fewer rash decisions, protecting your relationship and their outcomes.

## Case Study #1 – The ATO Debt Spiral

John, a café owner, was drowning under ATO debt. His accountant referred him to us before things spiralled further. We coached John through negotiations, reduced stress, and worked with his accountant to restructure. Within six months, the business stabilised and the accountant retained a loyal client.

## Case Study #2 – Retaining a Key Client

David was frustrated after his business partners split, ready to fire his accountant. With coaching, David realised his accountant was still in his corner. Together we rebuilt trust and strategy. Not only did David stay with his accountant, but he also referred new clients to him.

### Practical Tips for Accountants

- Spot the signs early – late lodgements, emotional calls, or sudden cash flow problems.
- Position a referral as part of your client care – not passing them on.
- Stay involved – joint meetings show you're still central to their journey.
- Build your advisor network – having a coach, lawyer, and broker at hand increases your value.

### Conclusion

Referring a coach goes beyond the numbers. It strengthens your client relationships, reduces your workload, and ensures better outcomes for everyone involved.

**👉** Final Takeaway: A simple referral can protect your client, your reputation, and your time.

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