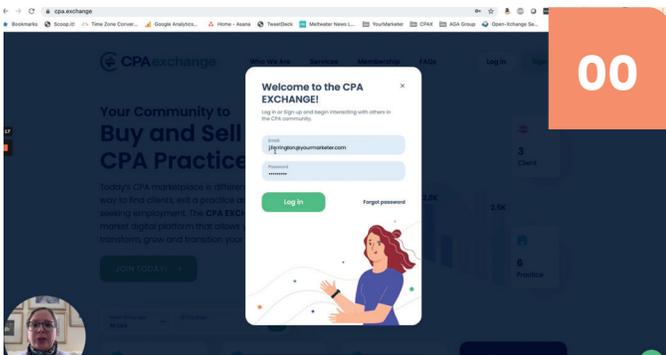


# HOW TO LIST A CLIENT FOR SALE



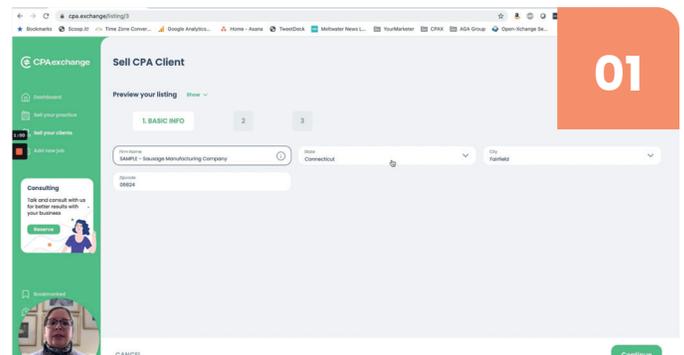
## Sometimes clients no longer fit the profile of your CPA firm. We make it easy to find them a new home.

It is easy to post a clients for sale on the CPA Exchange platform.



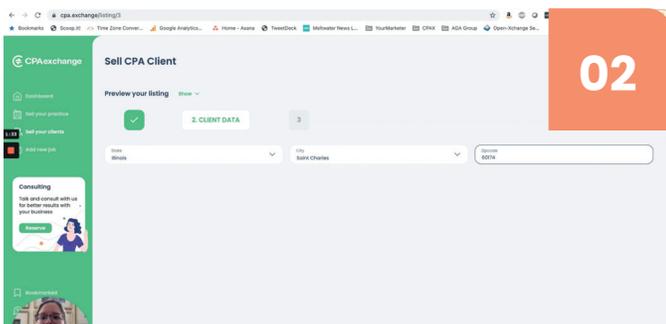
### Login to the CPA Exchange Platform

Once you are logged in and see your dashboard, go to the left-hand navigation bar, and select "Sell Your Clients"



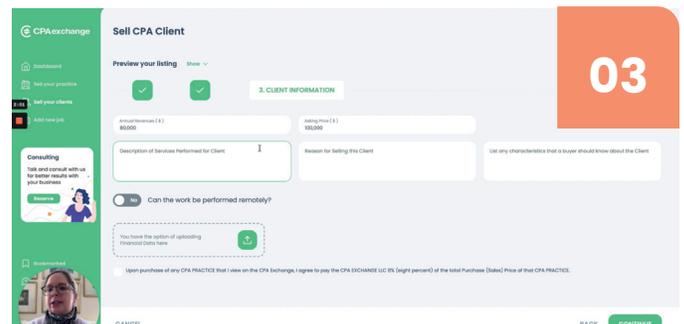
### First Step: Basic Information

Enter your firm name and the general industry description of the company you are selling, the state you are headquartered in, the city and zip/postal code. Click continue in the lower right-hand corner.



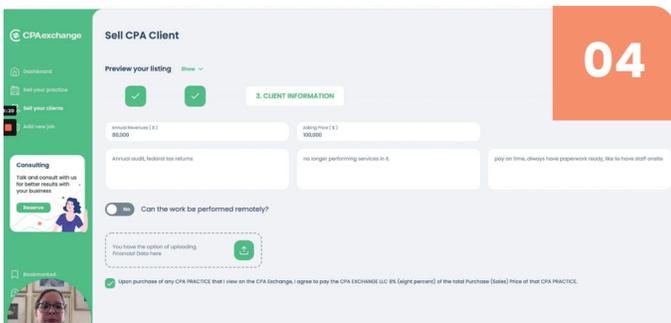
### Second Step: Client Basic Information

This step requires the basic information about the client. Enter the city, state and postal code for the client and click continue when completed.

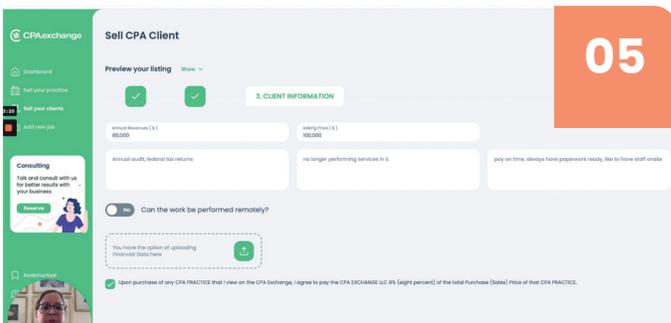


### Third Step: Client Information

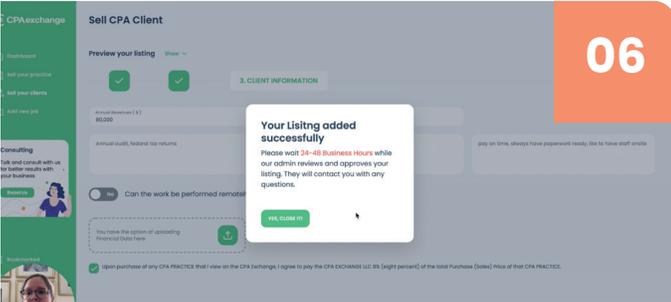
The third and final step provides the buyer with additional client information about the client. This is where you provide the annual billing for the client, the amount you are selling the client for, a description of the services you provide and the reason you are selling the client.



You can provide any characteristics about the client that a buyer should know, such as, they pay on time, have their paperwork ready, or require staff on site to perform the work. There is a toggle button to indicate if the work is able to be performed remotely or not.



You also have the option to upload financial documents. A checkbox is required for you to indicate that you understand there is an 8% fee on the sale price and select continue once finished.



You will see a pop-up showing that your listing was added, and that it will be reviewed by a site admin within 24-48 hours who will contact you if there are any questions with your listing prior to going live.

That's it! Welcome to the CPA Exchange LLC!