Who does what on every referral.

What each of us handles. Your written partner agreement controls if anything here differs.

OUR TEAM

Olive Branch

- Contact each business owner quickly and review their situation for free
- Collect MCA contracts and bank statements in the secure client portal
- Match each owner with an attorney licensed in their state
- Send urgent files to an attorney the same day
- Reassign any case an attorney declines
- Keep referral partners updated on each referral
- Introduce licensed lenders when the business qualifies

REFERRAL PARTNERS

Brokers, CPAs, advisors

- Refer owners only with their permission to be contacted
- Share accurate contact details and what you know about their advances
- Describe us honestly: a free review that connects owners with independent attorneys
- Use only marketing materials we've approved
- Keep client information confidential
- Follow the referral and payment terms in your partner agreement

ATTORNEY PARTNERS

MCA defense counsel

- Contact new clients promptly, the same day for urgent files
- Review the file and mark it Accepted or Declined in the attorney portal
- Mark Client retained once an engagement agreement is signed
- Explain options and fees to the client in writing
- Make every legal decision independently, under your state's rules
- Tell us promptly about any change to your license or capacity

How a referral moves

01
Owner referred
By a partner or directly on our site

02
Free review
Documents gathered in the client portal

03
Sent to attorney
Email alert plus the full file in the portal

04
Status updated
Accepted, Declined or Client retained

05
Way forward
Refinancing options when the business qualifies

Ground rules for every partner

- Never promise a specific reduction or outcome
- Never give legal advice unless you're the owner's attorney
- Never ask an owner to stop paying a funder on our behalf
- Never share sign-in codes, passwords or client files

Questions about your role?

Call us any business day and we'll walk you through it.

(480) 944-2611

5739 E Acoma Drive, Scottsdale, AZ 85254

Olive Branch Business Relief is a marketing company, not a law firm or lender, and does not provide legal, tax or financial advice. Attorneys are independent and solely responsible for their legal services. Olive Branch Business Relief is a trade name of CII & EJS Strategic Group LLC.

Response expectations

Who	When	What happens
Olive Branch	A new owner request arrives	We contact the owner within one business day
Olive Branch	A levy, lien or lawsuit is reported	The file goes to an attorney the same day
Attorney	A new referral is received	Contact the client promptly, the same day if urgent
Attorney	After reaching the client	Mark the case Accepted or Declined in the portal
Attorney	An engagement agreement is signed	Mark the case Client retained
Referral partner	A client asks not to be contacted	Tell us right away so we can stop outreach

Handling client information

- Use client details only for the referral they agreed to
- Keep files in the portals, not in personal email or chat
- Download only what you need, and store it securely
- Never forward private case links or sign-in codes
- Report a lost device or exposed file to us the same day

When a case is declined or moved

1. The attorney marks it Declined with a short reason
2. Our team is alerted by email right away
3. We reassign it to another attorney in the client's state
4. The first attorney loses portal access to the file
5. We keep the client and referral partner informed

Compliance reminders

Honor every opt-out
If an owner asks you to stop calling, texting or emailing, stop and let us know.

Keep advertising accurate
Any materials that mention Olive Branch need our approval first.

Follow your state's rules
Broker registration and referral compensation rules vary by state. Your agreement says what applies.

Escalate complaints
Tell us promptly about any client complaint or funder dispute involving a referral.

Your partner agreement controls. This guide summarizes how we work together. If anything here differs from your written partner agreement, the agreement governs.

Questions about your role?

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