

## PARTNER PROGRAM OVERVIEW

Our partners represent an important part of our network, actively contributing to the success of our member CEOs, and collaborating with us to build the strongest, most robust CEO Collectives possible. We work with the business advisors our members know and trust, so our CEOs can always be sure that these partners have a strong recommendation within the Katahdin Collective.

Partners in our network are building relationships with middle-market companies and are dedicated to the success of their clients. They are partners in the sense that they understand the power of enabling CEO success through peer learning and recognize the quality of the Katahdin methodology. They actively contribute to the health and dynamism of our CEO Collectives by encouraging their top CEOs to consider joining us; some serve as trusted advisors where their content expertise is needed; and, like us, act as unbiased and objective sounding boards to our CEO members.

## FREQUENTLY ASKED QUESTIONS

### How do you work with partners?

Our primary way of working with partners is by co-hosting CEO roundtable events. We typically bring together 3-4 non-competing partners for these events targeted at mid-market CEOs. Each partner is asked to invite 3 CEOs to join. This is a high-value event that takes attendees through the rigorous case process used in our CEO Collective peer groups. It's an interactive experience where each CEO has the chance to participate by asking questions and giving feedback on the case. CEO attendees are highly satisfied with the format.

Additionally, we do a monthly 30-minute call with partners to brainstorm how we can support each other, including referrals. We also invite partners to join us at other Katahdin sponsored events during the year, including our annual CEO Retreat in the fall.

### What's in it for me if I become a partner?

First and foremost, it's an opportunity to expand your network and become a trusted partner who, over time, receives referrals and connects with potential clients. The co-branded events enhance the visibility of your and your firm to all attendees and those invited. While the events are not about selling, they do give you a chance to meet new executives and other partners, as well as share expertise in an interactive experience so others can see what you have to offer. **We view partnership as any relationship - it's something that grows over time, as do the benefits.**

*“Each time we work together to organize a joint CEO Peer Event, the value to our firm is immense. Our clients walk away feeling as if we have gone out of our way to do something valuable for them. It helps our brand and ultimately helps our client CEO by connecting them with the Katahdin Group CEO Collective.” – Jeff DiSandro, Partner, Howard Fischer Associates*

Many of our partners come from our CEO Membership base as trusted referral sources and advisors. They include the area's most recognized companies across most traditional professional services used by CEOs:

- Executive Recruiters
- Private Equity
- Venture Capital
- Attorneys
- Accountants and Financial Services Executives
- Commercial Banks
- M & A Advisors
- Marketing Agencies
- HR and Benefits Consultancies
- Insurance Advisors
- Consultancies
- Wealth Management and Financial Advisors

## **A SAMPLING OF OUR CURRENT PARTNERS**

- Howard Fischer
- Burns & Levinson
- Santander Bank
- Salem Five Bank
- JP Morgan Wealth Advisors
- Bigelow
- BSG
- Mintz
- Rockland Trust
- Mass Capital Resources

## **INTERESTING IN EXPLORING PARTNERSHIP?**

Reach out to David Cohen at [dcohen@katahdingroup.com](mailto:dcohen@katahdingroup.com)