

INVITATION-ONLY • LIMITED MEMBERSHIP • NO COMP EXCHANGED

The Repsie Advisor Circle.

An invitation-only circle for a limited group of financial advisors, planners, and wealth managers whose high-earning clients keep asking about real estate. We equip your practice with education, tools, and attorney-led expert access — not commissions, not referral fees, not spiffs.

THE PROBLEM YOUR CLIENTS BRING YOU

Real estate questions in your inbox.

High-earning W-2 professionals and business owners want real estate — for the returns, yes, but mostly for the tax code. Their questions land in your inbox: REPS. Cost seg. Bonus depreciation. STR loophole. 1031. Answering them well takes hours you don't have. Answering them poorly costs you the relationship.

WHAT THE CIRCLE DOES

A working answer for those clients.

You send the curious client for a free qualification review. We handle the strategy work under attorney-client privilege, coordinate with their CPA, and keep you in the loop. The tax strategy stays with Repsie. The client stays with you.

Five value-adds. Zero comp.

• Membership is free and non-compensatory

#	VALUE-ADD	WHAT IT LOOKS LIKE IN PRACTICE
01	Client-facing education library	Videos, one-pagers, explainers — co-brandable with your firm's logo. Use them in reviews, quarterly meetings, and prospect follow-ups.
02	Complimentary qualification review	Curious client? Send them for a free property-and-profile review. We tell you both whether the strategy fits — no obligation, no cost.
03	Quarterly attorney-led briefings	Live sessions on the tax strategy landscape — where the law is moving, IRS signals, what to watch. Slides and recordings you can share internally.
04	Priority intake for your clients	Advisor-referred clients skip the general queue. Direct scheduling with our strategy team. Same standard of work — faster access.
05	Advisor directory (Q4 2026)	Once the Circle reaches 25+ members, we'll list you in a searchable directory for clients seeking a tax-strategy-aware advisor in their state.

COMPLIANCE • WORKFLOW • HOW TO JOIN

The compliance conversation, up front.

We designed the Circle knowing most of you operate under regulatory frameworks that limit outside compensation. RIAs. Series 65s. Wirehouse reps. Fee-only planners. Here's how we handle it — no surprises for your CCO.

Do you pay referral fees or spiffs?

No. The Circle is non-compensatory. No money moves to advisors for referrals. Clean under RIA fiduciary rules, wirehouse policy, and typical IBD comp restrictions.

Is there a fee to join?

No. Membership is free. Costs on our side are covered by our normal client engagements.

How do compliance departments react?

We send your CCO a plain-English memo describing the value-add structure and confirming no comp is exchanged. Most approve in a single review cycle.

Does the client pay Repsie directly?

Yes. Any strategy or real estate engagement is a direct contract between client and Repsie. You never touch the money and never sign for the client.

The workflow.

01

Introduction

Request an invitation. We book a 20-min call to understand your practice and typical client profile.

02

Onboarding

Access the education library, join the quarterly briefing calendar, get a direct line for client questions.

03

Referral (optional)

When a client fits, send them for a free qualification review. We coordinate with you and their CPA.

REQUEST AN INVITATION

A small circle. Serious advisors. Real work.

We're accepting a limited number of members while we get this right.
repsie.com/#/advisors • advisors@repsie.co • Utah-based, U.S.-wide clients

[Request Invitation →](#)