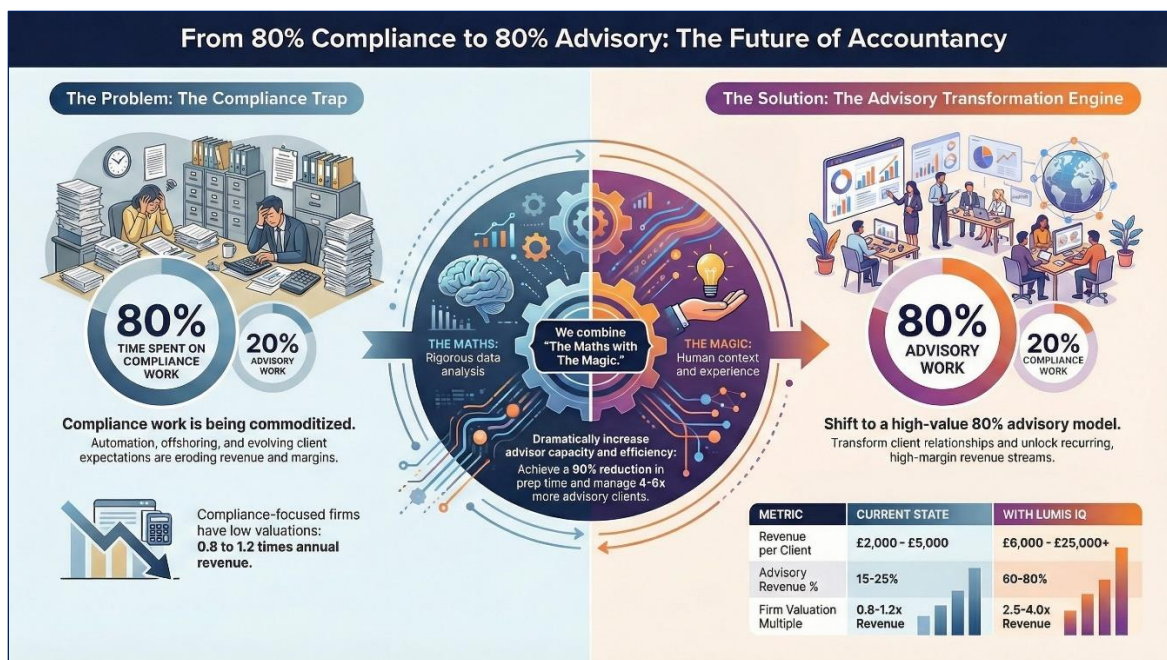


What if your firm could triple revenue per client whilst reducing analytical workload by 90%?

I appreciate you receive many approaches, so I will be direct: Lumis IQ enables accountancy firms to transform from 80% compliance / 20% advisory to 80% advisory / 20% compliance. For a firm with 2,000 to 5,000 SMB clients, this represents £8 million to £50 million in additional annual revenue.

This is not incremental improvement. It is fundamental practice transformation, and I am writing to explore whether a brief conversation might determine if this opportunity warrants your attention.



To gain an overview of the Lumis IQ approach please watch this video

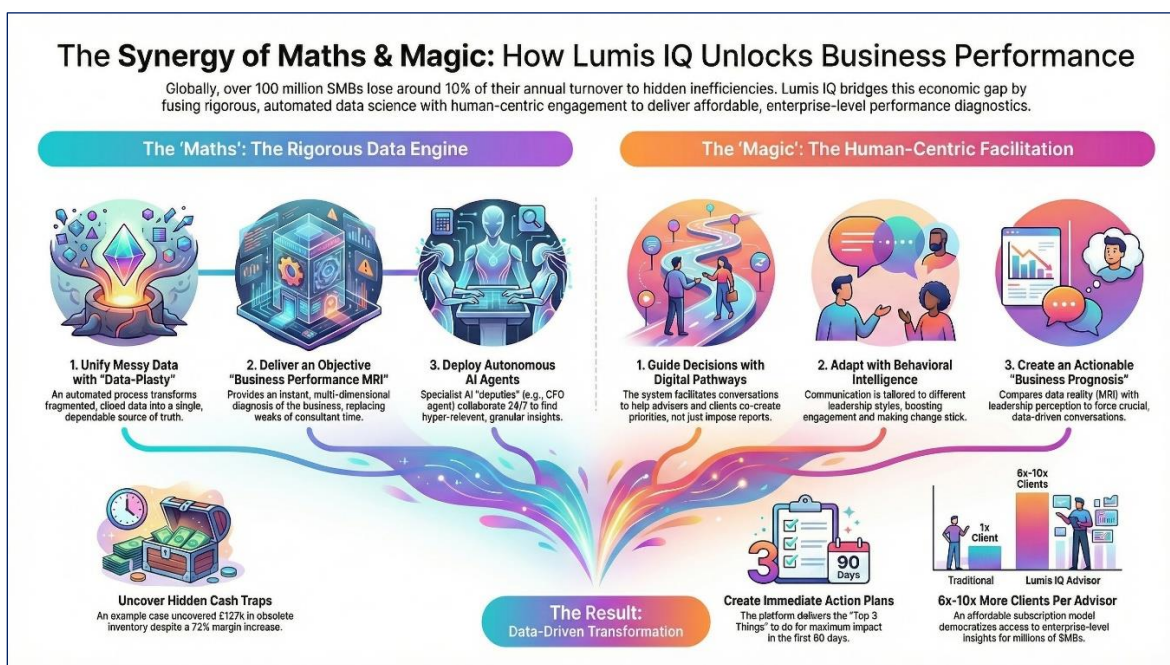
<https://vimeo.com/1157203652/a2a47ce088> (Control – Click the link)

The Core Proposition

Lumis IQ is the first platform to combine the Maths with the Magic:

The Maths: Our Business Performance MRI analyses 250 million potential data points per client through proprietary Data Plasticity technology, supported by 13 Microsoft Fast Track initiatives. Unlike tools requiring pristine data, we transform the messy reality of SMB systems into actionable intelligence.

The Magic: We identify each client's Top 3 priorities monthly, then guide implementation through Guided Pathways with fully automated behavioural styles adaptation. Your advisors facilitate sophisticated improvement conversations without needing decades of consulting experience.



To gain an overview of how Lumis IQ fuses Maths with Magic please watch this video

<https://vimeo.com/1156418450/79d9158097> (Control – Click the link)

The Transformation Impact

Metric	Current	With Lumis IQ
Revenue per SMB Client	£2K - £5K	£6K - £25K+
Advisory Clients per Advisor	15-25	60-100+
Analytical Preparation Time	Baseline	90% Reduction
Firm Valuation Multiple	0.8-1.2x	2.5-4.0x

Why This Matters to Partners Specifically

Enhanced Earnings: Partner drawings typically double through advisory revenue share and improved firm performance.

Equity Value Growth: Advisory-led firms command 2.5-4x revenue multiples versus 0.8-1.2x for compliance-dominated practices.

Competitive Security: As compliance commoditises, advisory capability becomes essential. Firms that transform now capture market share from those that hesitate.

Staff and Succession: Advisory-focused firms attract better talent and command stronger succession interest.

What Makes This Different

You may have seen advisory enablement tools before. Lumis IQ differs fundamentally:

Complete End-to-End System: Not a point solution but a full Seven-Stage Performance Framework from diagnostic through transformation.

Effectiveness Over Efficiency: We shift client conversations from doing things faster to doing the right things. This transforms advisory value.

Staff Experience Integration: Guided Pathways draw out frontline knowledge, dramatically accelerating change adoption and client results.

Advisory Overlay Capability: Uniquely, you can deliver advisory services to businesses without winning their compliance work first, expanding your addressable market significantly.

A Practical Next Step

I am not proposing we consume significant partner time without first establishing fit. Instead, I suggest a 30-minute video conversation to explore:

- Your firm's current advisory position and strategic direction
- Whether the transformation economics are relevant to your situation
- What a pilot programme might look like for your firm
- Whether a deeper conversation with senior decision-makers is warranted

If the initial conversation suggests genuine alignment, I would welcome the opportunity to present to your partnership in person. If not, we will have invested only 30 minutes in discovering that.

The accountancy profession is dividing into advisory leaders and compliance followers. The former will capture market share from the latter. This conversation is about determining which path your firm is on.

I will follow up by telephone within the next week to see if a conversation might be valuable. Alternatively, you are welcome to contact me directly to arrange a time.

With respect for your time,

Matt

Matt Thornton Brown

Executive Director

Lumis IQ

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P.S. *Our technology is built on 13 Microsoft Fast Track programmes, ensuring enterprise-grade security and integration standards. If technology governance matters to your firm, this foundation provides significant reassurance.*