

Coach referral program

You want your clients to thrive.
We want to celebrate your wins with you.

- For individual coaches and coach orgs
- 20% payout based on clients' paid monthly subscription
- Rewards are paid in perpetuity as long as the client remains a paying customer of Bloom
- Rewards paid to you quarterly
- Stats provided to you quarterly
- referrals.bloomgrowth.com



Note: This document is for general purpose Frequently Asked Questions. Please refer to your Revenue Sharing Agreement for the formal terms and conditions of the program.

Frequently asked questions

Click a question to get your answer.

Or scroll down to learn about the entire program.

Read time: 3 minutes

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What are the criteria to participate?

Simple!

You have a **Bloom Growth partner account** with us and are a raving fan!

- a. You are an individual coach, implementer, solopreneur
or
- b. You are a coach/consultant organization with a team of coaches



Don't have a Bloom Growth partner account and want to learn more about the value of our Partner Program?

➔ [Click to schedule your New Partner Training](#)

How do I register to become a member of the Coach Referral Program?

Easy! Two steps and you can begin referring clients:

1. Click link to [register as a Member of the Coach Referral Program](#)
2. Send us either your W9 - or - W8BEN tax form - see below

Why do I need to submit an IRS W-9 tax form?

The W-9 is a required form of the United States Internal Revenue Service when a business (Bloom Growth) pays a freelancer, independent contractor, or self-employed worker (a referral partner) \$600 or more in one calendar year.

The purpose of a W-9 form is to create an official record of a business relationship between a company and an individual who is not a regular employee. It is a record that has the taxpayer identification information (TIN), making it easier for Bloom Growth to create and issue a 1099 form for your use in filing your taxes at tax time.

What about international referral partners, do I have to submit a tax form?

Yes. The W-8BEN or the W-8BEN-E are the forms from the United State's tax collection agency, the Internal Revenue Service (IRS).

All foreign (non-US) individuals or businesses that receive revenue share rewards from Bloom Growth are required to fill out either the W-8BEN (for Individuals) or the W-8BEN-E (for businesses/entities).

How do I submit my tax form?

For US partners

- ➔ Click here: [Send us your W9 via this secure platform](#)

For International partners

Choose the appropriate form to your business structure:

Individuals

- ➔ Click to download your [W-8BEN \(individuals\)](#)
- ➔ Click for [W-8BEN Instructions](#)

Entities

- ➔ Click to download your [W-8BEN-E \(entities\)](#)
- ➔ Click for [W-8BEN-E Instructions](#)

- ➔ **email your completed form to:** tax.documents@bloomgrowth.com



Important note

If your referral rewards meet or exceed the \$600 threshold in a calendar year, Bloom Growth will issue a 1099 for use in filing your annual tax return. Bloom Growth does not provide tax advice. Please consult your tax advisor.

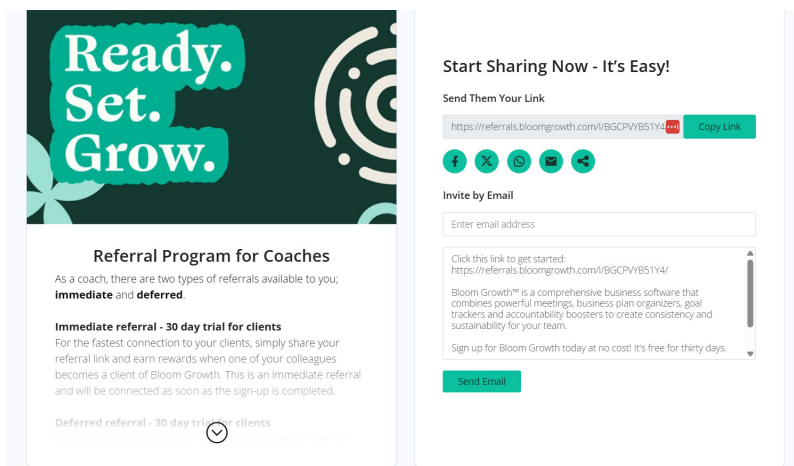
I'm already registered, how do I find my login page?

➔ Click link to access your [Coach Referral Login page](#)

Bloom Growth Referral - Member Dashboard

Once you join the program, you will have access to your personal member dashboard with easy instructions on sharing. You will also be able to see information about your progress and rewards at the bottom of the dashboard.

Member Dashboard Navigation & Referral URL



My Dashboard

Hosts your referral URL, easy-share social icons and email share options.

My Referrals

Shows a list of all your client referrals

My Rewards

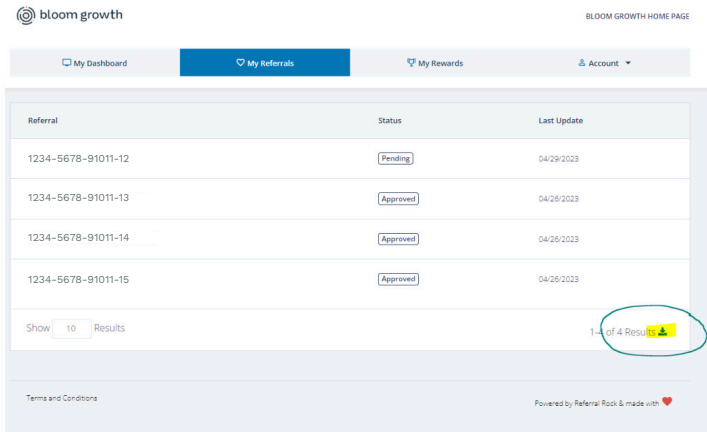
Shows an itemization of your rewards payout by client referral

Account

Update your profile, email address, reset your password, etc.

How do I obtain a list of all my client referrals?

From your member dashboard, click on **My Referrals** and the download icon in the bottom right corner of your referrals dashboard to generate a CSV file



Why do I see multiple referrals for the same org and org ID?

The calculations for the Bloom Growth Coach Referral Program are pushed into the Referral Rock platform on a quarterly basis. These may appear to be duplicate entries for each referral. While similar, each referral indicates the quarter that it relates to or simply to correlate an organization to your member account. Please do not be concerned by these similar entries.

Where can I find a copy of the program Terms & Conditions?

You can find a copy of the Revenue Share Agreement T&Cs in the footer of your **member dashboard**, or ➡ click here: [Bloom Growth Revenue Sharing Agreement](#)

How do I claim my referral reward?

Funds are issued in 3 steps:

1. On a quarterly basis, Bloom Growth will calculate your referral reward and fund your account.
2. A representative with Bloom will call and/or email to notify you that your account has been funded.
3. You will receive an email from Wise, the platform we are using to securely manage reward payments, with instructions on how to add an account in which to claim your reward.

Wise Platform

You will only have to set up your account one-time on the Wise platform. On a quarterly basis going forward, you will receive an email when your account is funded & will be required to click the link in the email to accept your referral reward.



Important note about claiming your referral reward

The funds will be available for 7 days. If they go unclaimed within that time frame, the funds will be returned to us. We will attempt to transfer funds a total of three times. If the funds go unclaimed after three attempts, they may be forfeited.

Referral Reward Payment Schedule

Rewards are issued quarterly per the following schedule

1Q - Jan | Feb | Mar - Issued Mid-April

2Q - Apr | May | Jun - Issued Mid-July

3Q - Jul | Aug | Sep - Issued Mid-October

4Q - Oct | Nov | Dec - Issued Mid-January

Getting Help

The Bloom Growth Coach Referral Program is built using several platforms to manage the overall program. We've outlined the steps and platforms below.

If you have any issue during any phase of the process, please refer to the contact information:

Step 1: Referral Rock

The central portal and member dashboard that has all your referral information, referral methods, links, reward history, etc.

➔ For technical help with Referral Rock: partner.sucess@bloomgrowth.com

Step 2: Get W9

The secure platform in which to submit your W-9 tax form to us (one time)

➔ For technical help with Get W9: <https://getw9.tax/contact>

Step 3: Wise

Integrated and secure platform in which to claim your reward. You will set this up one-time. On a quarterly basis, we will fund your referral account, and you will receive a payment notification from Wise to collect your reward.

➔ For technical help with Wise: <https://wise.com/help/>

Overall Program Questions

If you still have questions, please email or schedule an optimizer session with a Bloom Growth relationship team member:

Email: partner.sucess@bloomgrowth.com - or - [Schedule an Optimizer Session](#)

How do I refer a client to Bloom Growth & considerations for each?

Once you are registered in the program, you can find referral methods provided in your Member Dashboard. But, basically, there are two ways to refer. We've included considerations for each:

Immediate referral - 30-day trial for clients

For the fastest connection to your clients, simply share your referral link and earn rewards when one of your colleagues becomes a client of Bloom Growth. This is an immediate referral and will be connected as soon as the sign-up is completed.

Consideration

You will receive your reward sooner, but, you will not be linked to your client account with a free seat from within your Bloom Growth coach account.

Best for coaches that want to make a quick introduction to Bloom Growth.

Deferred referral - 30-day trial for clients

If you want a sign-up to occur in advance of a session day, you can [t](#). Be sure to add your referral link in the form. There may be a delay in connecting the referral to your account.

Consideration

This allows you to align the set-up of a new client account to your kick-off session. It also ensures you are linked to your client account with a free seat, in which you can access via 'change organization' from within your coach account.

Best for coaches or coach organizations who are actively engaged with clients, providing a structured onboarding process or teaching a set operating system.



Note: We are unable to accept referrals via email, telephone or in person.

What happens to my referral reward if my client graduates from my coaching program, or switches to a new coach?

The referral reward will be issued to the original referring coach as long as the client is a paying client of Bloom Growth. If a client switches coaches or implementers, the referral reward will remain with the original referring coach. Referral rewards will not be transferred.

Want to learn more about the program or still have unanswered questions?

Click to [Schedule an Optimizer Session](#) with a Bloom Growth relationship team member today!