

Relay's Partner Program for Accountants & Bookkeepers

BECOME A TRUSTED AUTHORITY ON BUSINESS BANKING

Build your client banking expertise through a program that offers dedicated support, certifications, rewards, and a growth-focused community of top-tier advisors. [Terms & Conditions](#)

[Become a Partner](#)[See partner rewards](#)

- Earn \$50 - \$300 per client onboarded to Relay
- Manage all client banking with a single login from your Partner Portal
- Get more clients through Relay's [Advisor Directory](#) and Ambassador Program



ALLEN MESIA
Mesia Group



ANGIE ORTEGA
Nubus Accounting & Tax Firm LLC



JASON SNIDER
Aspyr Advisors



CYNDI THOMASON
Bookkeep



Join our community
of cash flow consultants



Our Shared Mission

GIVE CLIENTS CASH FLOW CLARITY & CONTROL

Small business owners have big expectations from their advisors.
Relay's Partner Program helps you keep them on the money.

BANKING BUILT FOR YOU AND YOUR CLIENTS

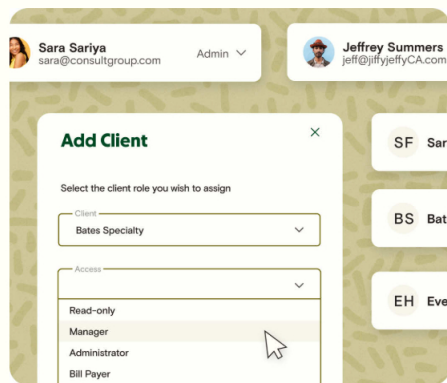
Hassle-free banking that fits your workflow

See the real numbers. Get clarity with reliable bank feeds that sync with QuickBooks Online and Xero.

Save time with lightning-fast reconciliation. You can kill the guesswork with ultra-detailed data for every transaction.

Stop leaking money. Relay has no hidden fees, overdraft fees or minimum balances.





Manage client banking with a single login

Smooth onboarding. You can onboard clients to Relay directly from your portal.

Easy access. Relay lets you switch between multiple clients' accounts with a single login, no password-sharing or 2FA codes required.

Permission control. Invite your team and control what they can see or do within each account.

RELAY BANKING. CLIENTS THANKING.



Using Relay for less than a year and have been highly pleased with their customer service. Relay's customer service has walked me through set up and ongoing guidance for my clients as well as for my company.

— ELIZABETH MOUSER
Senior Bookkeeper

SWITCH BANKS WITHOUT THE BURDEN

Your clients won't have to worry about a stressful switch to Relay. We make the transfer smooth, secure, and simple.



Smart switching wizard

Relay automatically captures your client's existing transactions, ensuring you can move every dollar, deposit, and payment without letting anything slip through the cracks.



Dedicated account manager

Your dedicated account manager will walk you through the ins-and-outs of Relay, help you put together a game plan, and provide white-glove onboarding for your clients. That means training, account creation, and support—whenever you need it.



Banking Partner Certification

Our certification helps you become a trusted advisor for businesses that want to use fintech banking, helping you grow in confidence and get more referrals.

ONBOARD CLIENTS TO GET CASH REWARDS

We offer cash rewards for every new client you bring to our platform. The more you grow, the more you earn.



Bronze
1-2 clients



Silver
3-19 clients



Gold
20-49 clients



Platinum
50+ clients

One-time cash reward per approved client

\$50

\$100

\$150

\$200

One-time cash reward for \$10k balance*	\$25	\$50	\$75	\$100
Monthly revenue share**	0%	0%	5%	10%
Grow & Scale discounts	0%	15%	20%	25%
Hours of work saved per month***	3-10 hrs	9-95 hrs	60-245 hrs	250+ hrs
Free Grow for your firm	✓	✓	✓	✓
Dedicated account manager and white-glove onboarding	✓	✓	✓	✓
Relay Ambassadorship eligibility		✓	✓	✓
Private Slack with your account manager and support host to help you grow your firm				✓

* Paid out for each client when \$10K balance is met within the first 12 months after approval

** Monthly revenue share, a percentage of the interest Relay earns on client deposits from our partner bank, Thread Bank

*** On average, advisors report that Relay saves 3-5 hours per client per month

[Become a Partner](#)

Relay's Advisor Directory for Trusted Firms

STAND OUT AS A BEST-IN-CLASS ADVISOR

64% of small businesses that start banking with Relay still need a reliable accountant or bookkeeper. All our partners get a place in our Advisor Directory, making it easy to attract top-tier clients who bank the way you do.

- 1 Sign up for the Partner Program
- 2 Visit the [Advisor Directory](#)
- 3 Grow Your Firm

[Join the Partner Program](#)

Sandra Summers CPA, CMA

☒ Buffalo, NY, USA
 ☒ Relay Partner

Unlock financial excellence with my professional accounting services. With a decade of expertise, I offer meticulous bookkeeping, tax planning, and strategic financial guidance.

Bartholomew Christophs CPA

☒ New York, NY, USA
 ☒ Relay Partner
 ☒ Remote Services

GROW FASTER. GROW TOGETHER.

You'll join a like-minded community of accountants and bookkeepers who offer support and drive each other's success.

Grow your business beyond the books

When advisors get together, we learn from one another. Relay regularly hosts virtual events, workshops, and community get-togethers.

Raise your profile as a Relay Ambassador

You can earn more and grow faster as a Relay Ambassador. We'll sponsor you to run workshops to educate small businesses on banking.



Sign up today



YOUR CLIENTS WILL THANK YOU. YOU CAN BANK ON IT.

First Name* 

Last Name*

Business Email*

Company Name*

Phone Number**

 +351

Are you an accountant or bookkeeper?* 

Submit

BANK WITH US. GET THANKS FROM THEM.

I can happily leave a 5 star review for Relay.

I'm so happy that I went into business when they were already set up and running. Relay has been an important part of my tech stack and my clients appreciate that I can point them to a good banking partner like you guys. Thanks for all you do!



— Elmwood Bookkeepers



Relay

What is Relay

Business checking
Business savings
Profit First banking
Accounts payable
Expense management
Invoices
Payment Requests
Pricing
Integrations
Xero

Accountants & Bookkeepers

Client banking
Partner program
Get certified
Guides
Accounts payable
Data security
Growth playbook
Becoming a cash flow advisor

Resources

Everyday business blog
Advisor directory
Advisor hub
FAQs
BI-weekly webinar
Support center
Banking for real estate investors
Banking for e-commerce
Banking for home services
Banking for agencies

Company

About us
Customer stories
Careers
Affiliate program
Contact us
Why Relay
Trust Center
Safety & Security

Legal

Terms of Service
Privacy Policy
Deposit Agreement
Savings Account Agreement
Cardholder Agreement
Electronic Communications Agreement
Relay Visa® Credit Card Cardholder Agreement
Visa® Signature Card Rewards Program Terms & Conditions

QuickBooks Online

Switch to Relay

Gusto

Cash Flow Compass

Plaid & Yodlee



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Relay is a financial technology company and is not an FDIC-insured bank. Banking services provided by Thread Bank², Member FDIC. FDIC deposit insurance covers the failure of an insured bank. Certain conditions must be satisfied for pass-through deposit insurance coverage to apply. The Relay Visa® Debit Card is issued by Thread Bank, member FDIC, pursuant to a license from Visa U.S.A. Inc. and may be used anywhere Visa debit cards are accepted. The Relay Visa Credit® Card is issued by Thread Bank, Member FDIC, pursuant to a license from Visa U.S.A. Inc. and may be used anywhere Visa credit cards are accepted.

¹For Relay Subscription Plans with an interest-bearing deposit account, the interest rate and Annual Percentage Yield on your account are accurate as of 10/30/2025 and are variable and subject to change based on the target range of the Federal Funds rate. Fees may reduce earnings:

- When you are subscribed to the Starter Plan, the interest rate on your savings accounts is 0.91% with an APY of 0.91%.
- When you are subscribed to the Grow Plan, the interest rate on your savings accounts is 1.53% with an APY of 1.55%.
- When you are subscribed to the Scale Plan, the interest rate on your savings accounts is 2.65% with an APY of 2.68%.

²Your deposits qualify for up to \$3,000,000 in FDIC insurance coverage when Thread Bank places them at program banks in its deposit sweep program. Your deposits at each program bank become eligible for FDIC insurance up to \$250,000, inclusive of any other deposits you may already hold at the bank in the same ownership capacity. You can access the terms and conditions of the sweep program at <https://thread.bank/sweep-disclosure/> and a list of program banks at <https://thread.bank/program-banks/>. Please contact customerservice@thread.bank with questions on the sweep program. Certain conditions must be satisfied for pass-through deposit insurance coverage to apply.

*Terms and conditions apply to the cash back rewards program. Monthly cash back rewards will be automatically deposited into your Relay checking account within 30 days of the end of the credit card billing cycle. ATM transactions, the purchase of money orders or cash equivalents made with your Relay Visa® Credit Card are not eligible for cash back. Please refer to the [Visa® Signature Rewards Program Terms & Conditions](#) for more details.

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