

Partnership Opportunities with Refdesk.ca

Our Partnership Philosophy

At Refdesk.ca, we believe in:

- **User-First Approach:** Recommendations based on user value
 - **Quality Over Quantity:** Selective partnerships
 - **Transparency:** Clear disclosure of relationships
 - **Long-Term Thinking:** Sustainable partnerships
 - **Mutual Growth:** Success for partners and users
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Partnership Tiers

Tier 1: Featured Partner

Best For: Financial institutions, insurance providers, major service platforms

What's Included:

- Featured placement in up to 3 relevant topic guides
- "Canadian Pick" partner badge
- Custom description (100-150 words)
- Logo and branding
- Dedicated CTA button
- Tracked affiliate link
- Resource directory listing
- Monthly performance reports

Example Partners: Wealthsimple, Questrade, EQ Bank, Borrowell

Tier 2: Topic Partner

Best For: Niche products aligned with specific topics

What's Included:

- Featured placement in 1 specific topic guide
- Partner badge
- Custom description (75-100 words)
- Tracked affiliate link
- Resource directory listing
- Quarterly performance reports

Example Topics:

- Student loan refinancing → Student Loans topic
 - Car insurance comparison → Car Insurance topic
 - Tax software → Filing Taxes topic
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Tier 3: Resource Listing

Best For: Brand awareness, complementary services

What's Included:

- Listing in resource directory
- Category placement
- Company description
- Direct link to website
- Searchable via global search
- Annual review and update

Investment: Free for government/non-profits; nominal fee for commercial

Tier 4: Sponsored Content

Best For: Brands with educational mission

What's Included:

- Co-created educational article (1,000-2,000 words)
- Clear "Sponsored by [Brand]" label
- Published as standalone guide
- Social media promotion
- Maintained on site for minimum 12 months

Requirements:

- Must provide genuine educational value
 - Subject matter expertise required
 - Meets editorial quality standards
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Tier 5: Custom Partnership

Best For: Large-scale partnerships, unique collaborations

What's Included:

- Custom partnership structure
- Site integrations
- Interactive tools or calculators
- Exclusive category sponsorship
- Custom landing pages

Examples:

- Mortgage calculator integration
 - Budget planner tool
 - Category sponsorship: "Retirement Planning by [Brand]"
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Partner Requirements

All Partners Must:

✔ Serve Canadian customers ✔ Align with our values (privacy-focused, ethical) ✔ Provide quality products/services ✔ Be reputable with good standing ✔ Respect users (no dark patterns) ✔ Maintain

regulatory compliance  Accept clear affiliate disclosure

We Cannot Partner With:

 Predatory lending services  Multi-level marketing (MLM) companies  Cryptocurrency scams 
Misleading products/services  Poor customer service records

Partnership Process

Step 1: Initial Inquiry

You Provide: Company info, products, target audience, partnership goals **Email:** partners@refdesk.ca

Response Time: Within 2 business days

Step 2: Evaluation

We Review: Audience alignment, value fit, competitive landscape **Timeline:** 3-5 business days

Step 3: Discovery Call

We Discuss: Goals, audience fit, available tiers, success metrics **Duration:** 30-45 minutes

Step 4: Proposal

We Provide: Custom partnership proposal, pricing, timeline **Timeline:** Within 5 business days of call

Step 5: Agreement

We Finalize: Terms, tracking setup, communication channels **Timeline:** 1-2 weeks

Step 6: Implementation

We Execute: Content creation, integration, testing, launch **Timeline:** 2-4 weeks

Step 7: Ongoing Management

We Maintain: Performance reporting, content updates, optimization

Sample Partnership Scenarios

Scenario 1: Investment Platform (Featured Partner)

Partner: Online investment platform **Placement:**

- Retirement Planning topic
- Investing for Beginners topic
- Student Loans topic

Expected Results:

- High-quality leads from retirement-focused users
 - Strong engagement from DIY investors
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Scenario 2: Car Insurance Comparison (Topic Partner)

Partner: Insurance comparison platform **Placement:** Car Insurance in Canada topic (exclusive)

Expected Results:

- Targeted traffic from insurance shoppers
 - High intent users
 - Multiple quote requests
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Scenario 3: Tax Software (Sponsored Content)

Partner: Tax preparation software **Placement:** Sponsored article "Tax Filing Guide for Freelancers"

Expected Results:

- Thought leadership in tax space
 - Evergreen content value
 - Brand association with expertise
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Performance & Reporting

Metrics We Track

For Featured & Topic Partners:

- Click-through rate (CTR)
- Conversion tracking (where available)
- Engagement time
- Device breakdown
- Geographic distribution

Reporting Frequency:

- Featured Partners: Monthly
 - Topic Partners: Quarterly
 - Resource Listings: Annual
 - Sponsored Content: Initial + 3-month
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Contact Us

Email: partners@refdesk.ca

Include:

1. Company name and website
2. Products/services overview
3. Target audience
4. Partnership tier of interest
5. Any questions

Response Time: Within 2 business days

Thank you for considering a partnership with Refdesk.ca.

We look forward to growing together and serving Canadian audiences.

For the most current version, contact partners@refdesk.ca