

OCC 2026/27 Partner Opportunities

Effective October 1, 2026 · Existing partners December 1, 2026 · All prices USD

Set your standards once. Every profile after that is built to them.

Profiles are one price for everyone. There is no partner discount on a profile, because a percentage off is the weakest thing we could offer you. An agency gets a better deal two ways that are both worth more: by committing volume through a credit pack, or by earning back up to half its annual fee through the profiles we design for its families.

Two ways to partner

1. Preferred Provider. Nothing to sign, no cost.

Open to any agency or attorney who wants to refer families. No fee, no minimum, nothing to sign.

- Your criteria built into our intake. A family cannot submit photos or text that fall outside your standards, so nothing comes back to your staff to fix.
- A co-branded intake link, so it reads as part of your process, not a hand-off.
- A named contact at OCC, not a queue.
- One reserved rush profile slot a year, available from the day you sign on.
- A reciprocal link. Your listing on our site, ours on yours (optional).

The part that matters most: your families' profiles are built to your agency's standards from the first draft, so they get approved quicker.

2. Waiting Family Page Management

Twelve month term, sixty day renewal notice. Setup applies to new build or takeover. The page is hosted on our Squarespace site. Includes everything in Preferred Provider, plus the waiting family website page itself, online waiting family profiles, page management, analytics, and additional

rush slots.

	STARTER	GROWTH	PREMIER	PREMIER PLUS
Setup (new build or takeover)	\$750	\$1,500	\$2,500	\$3,500
Annual	\$2,100	\$4,200	\$8,400	\$16,800
New families added / year	up to 12	up to 25	up to 50	up to 100
# of profile designs to reach full earn-back	6	12	24	48
Most you can earn back	\$1,050	\$2,100	\$4,200	\$8,400
Waiting family profile	included	included	included	included
Adding / removing / archiving families	included	included	included	included
Standard listing updates	unlimited	unlimited	unlimited	unlimited
Update turnaround	2-3 days	2-3 days	2-3 days	2-3 days
Page setup or transition turnaround	10 days	10 days	10 days	10 days
Reserved rush slots	1/yr	1/yr	2/yr	3/yr
Page Analytics	bi-annual	quarterly	monthly	bi-monthly

All tiers include: built to your profile criteria, co-branded intake, and a named contact at OCC.

Site and domain fees

Your waiting family page is hosted on our Squarespace site at no additional cost, for as long as your agency is on a partner tier. If your agency leaves the tier program, we invoice those costs to you each year and you agree to pay them.

If an agency outgrows its tier

A tier is sized by how many new families join your page in a year.

If you exceed your limit in the first nine months, you can choose: \$350 for each family past the limit, or move up to the next tier and pay the difference between the two annual fees. Your renewal date does not change, and there is no new setup fee.

If you exceed your limit in the last three months of your term, there is no charge for those families. At renewal, we look at your actual count and move you to the tier that fits. If a year runs high once and settles back, we move you back down at the following renewal. The tier should match what you actually use.

Premier Plus is our largest tier, so each new family past 100 is \$350, whenever it happens, or we will discuss an Enterprise level.

No surprise invoices.

How you earn back part of your annual fee

When we design the profile for a family on your page, your agency earns \$175 toward your next renewal. Only full profile design earns back: the 12 page Essential Profile and the 16 to 20 page Signature Profile. Online Profiles, refreshes, and any other product or service we sell do not.

You can earn back up to half your annual fee. Six profiles reaches that on Starter, twelve on Growth, twenty-four on Premier, forty-eight on Premier Plus. It does not matter whether the family or your agency pays for the profile.

Earn-backs are applied at renewal. They are not refunded and not paid out in cash.

Existing partners: Starter takes half off the first annual fee. Growth, Premier and Premier Plus take \$2,000 off. One time only, and separate from the earn-back. Earn-backs begin adding up immediately upon your first payment.

Rush slots do not stack

You get one rush allowance a year, based on your highest tier. Premier is two and Premier Plus is three. If you are also a referrer and buy a credit pack, you still get your tier's number, not more. Credit packs add none. Unused slots do not carry over. Each rush slot would cost a family \$495, so Premier Plus's three are worth about \$1,485 a year.

Profile credits

One credit is one Signature Profile: 16 to 20 pages, digital PDF, two rounds of review, Plan & Post outreach package included, dependent on state self-advertising laws. Everything else is priced separately.

A credit is a prepaid profile. An earn-back is the \$175 a partner agency earns toward its annual page fee. They are two different things.

Pack	Paid in full per credit	Pack total	6 payments per credit	Pack total
6 credits	\$972	\$5,832	\$997	\$5,982
12 credits	\$947	\$11,364	\$972	\$11,664
24 credits	\$922	\$22,128	\$947	\$22,728

The 6-pack on a payment plan is list price, spread over six months. Savings start with the 12-pack.

Credit rules

- No fractional credits. One credit, one Signature Profile.
- A credit can be applied to an Essential Profile, with no refund of the difference.
- A profile paid for with a credit does not also earn an earn-back. Credit packs and earn-backs are two ways to get a better deal, and they do not stack.
- Unused credits expire at the end of a one-year term. If the agency renews before expiry, unused credits carry into the new term.
- Credits are not transferable between agencies and have no cash value.

Payment

Pay in full, or in six equal monthly payments charged to a card or account on file. All your credits are ready from the first payment. If a payment is missed, profiles in production finish but no new ones start until you are current.

Disclosure

Your agency agrees to tell your families that OCC provides a credit toward your annual page fee when we design their profile.