



BLUEPRINT FOR EXCELLENCE RETREAT REGISTRATION FORM JULY 23-24, 2012 • PARK CITY, UTAH

Firm: _____

Main Contact: _____ Title: _____

Address: _____

City: _____ State/Province: _____ Zip Code: _____

Phone: _____ Fax: _____ Email: _____

Retreat Participants

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

First Attendee

\$895 – UAN Member \$ _____

\$1,195 – Non-member _____

Additional Attendees

UAN Member Number of additional _____ X \$795 = \$ _____

Non-member Number of additional _____ X \$995 = _____

Total Cost \$ _____

Check method of payment:

Check Name of Cardholder: _____

Visa/MasterCard Card Number: _____

Expiration Date: _____

Please make checks payable to **Upstream Academy**. Fax to (406) 442-1100, or mail to the address below. A confirmation with retreat logistics and details will be sent upon receipt of this application.



P.O. Box 1147
Helena, MT 59624
phone: 406-495-1850
fax: 406-442-1100

UNCONDITIONAL GUARANTEE

YOUR SATISFACTION WITH THE BLUEPRINT FOR EXCELLENCE RETREAT IS GUARANTEED. IF YOU ARE NOT COMPLETELY SATISFIED WITH THE VALUE YOU RECEIVE, WE WILL, AT YOUR OPTION, EITHER REFUND YOUR REGISTRATION FEES, OR ACCEPT A PORTION OF THOSE FEES THAT REFLECTS YOUR LEVEL OF SATISFACTION.

BLUEPRINT FOR EXCELLENCE TESTIMONIALS

"In all sincerity, I believe you are offering us a tool that will truly take our organization to the next level – internally in developing our team members as well as externally in the difference we can make with our clients. We've known for years that we needed to strive for excellence, but it was something we couldn't quite get our arms around. The process you offer feels like you're actually putting the key in our hand."

J. Mort O'Sullivan III, Managing Partner – O'Sullivan Creel, LLP

"Blueprint for Excellence is one of the best, most practical approaches to the ongoing management of a firm that I've seen in a long time. With the class discussion and software, you walk away with a tool that actually allows you to focus, plan and work on 'Quadrant 2' issues."

Diane Medley, Managing Partner – Chilton & Medley PLC

"Excellence does not happen by accident. This two-day workshop shows a structured, manageable process to strategic planning, goal setting and continuous improvement that any organization could use to excel."

Steven Kelly, President & CEO – The Rehmann Group

"Thank you for a great seminar...this was probably the best I've been to in my 20+ year career. I like the whole idea of Blueprint for Excellence and have used many of the ideas in practice. Nothing has ever brought it all together like this program/process will do. It showed me how we should be running our firm and the process needed to make it happen."

Robert J. Helm, Partner – Elliott Robinson & Co., LLP

"Management understands the importance of teamwork and accountability, but achieving it is generally elusive within organizations. The Blueprint for Excellence process provides the theory, processes and tools which increase both organizational teamwork and accountability. The Blueprint process has made a significant difference in our firm in less than a year of applying the tools."

Gary B. Carlson, COO – Anderson ZurMuehlen & Co., P.C.

"The Blueprint for Excellence workshop provided us the tools to create common direction and criteria to be used on our daily decisions and tasks. With the roll out of our new entity, separate from our CPA firm, we were able to involve our entire team in the creation of our new vision. In addition the workshop provided us the tools to improve our processes and monitor the results of our continual improvement efforts."

Richard P. Sommer, CEO – Intellitec Solutions