

PRSRT STD
U.S. POSTAGE
PAID
HELENA, MT
PERMIT NO. 221



Upstream Academy's Premier Event
for Leading Partners in Accounting Firms



July 8-9, 2010 • Park City, Utah

HEADWATERS™ 2010

THE RECESSION CATALYST:
CREATING A BETTER FUTURE
FOR YOUR FIRM



HeadWaters™ Leadership Conference
P.O. Box 1147
Discovery Block
Great Northern Town Center
828 Great Northern Blvd.
Helena, MT 59624-1147

Only the first 140 registrants
are guaranteed participation
in this leading-edge event.

A GOOD RECESSION IS A TERRIBLE THING TO WASTE!

The past two years have been challenging for many firms,
and some blame the recession.

We don't believe recessions cause weaknesses in firms.
We believe they reveal them.

After nearly two decades of good times, the bubble finally burst in 2008.
Significant firm weaknesses – easily brushed aside
during prosperous times – suddenly became hard to ignore.

The crucial question is this:
Will you allow difficult economic times to become a catalyst for change?
Or will such times be just another irritation, something to be endured?

After all, a good recession is a terrible thing to waste.



The Conference

We see tough times as a catalyst for change, a chance to create a better future for your firm. So how can HeadWaters™ 2010 help you secure that brighter future? Here are some of the key questions this conference will answer:

- What do you need to do to build, maintain and repair trust among team members, and how can that trust make a difference?
- What are the sometimes unseen signs of poor communication and how can better communication skills make a difference for your firm?
- What should you be doing right now to prepare for the time when the recession is history – and so are your best rainmakers?
- How can focusing on average revenue per client and "cross-servicing" dramatically impact firm members' success in cross-selling?
- How should you be treating your firm's stars, those individuals who will most positively impact the firm's future?
- What can you do to take your firm's training program from "mediocre" or even "good" to something that truly makes a difference, both for the firm and for individuals?
- How can you most effectively use social media for networking, marketing, business development, and recruitment?

The Location

This year's HeadWaters™ conference is again in Park City, Utah, this time at the elegant Stein Eriksen Lodge. Minutes away from Park City's Main Street and an easy 45-minute (38 mile) drive from Salt Lake City International Airport, the Stein is world-renowned for its beautiful accommodations, impeccable service, and memorable alpine setting.

The Park City area offers outstanding dining, shopping, and recreational opportunities for conference participants and their families. Nearly 90 restaurants await you, along with factory outlet stores, quaint shops, historic tours, golf, fly fishing, mountain biking, hiking, backpacking, horseback riding, and water sports.

Join us for HeadWaters™ 2010!

Comprised of some of the nation's top thinkers in the profession, our roster of conference presenters will confidently and knowledgeably address many of the most challenging issues facing firms today.



Sam M. Allred
Founder and Director
of Upstream Academy



Graham Wilson
President of
The Wilson Group, LLC



Jennifer Wilson
Partner and Co-founder of
ConvergenceCoaching, LLC



Timothy J. Bartz
CEO of
Anderson ZurMuehlen & Co.



Jack Hinsche
Managing Partner Emeritus
of Windes & McClaughy



K. Tim Larsen
Managing Partner of
Squire & Company, PC

CONTINUING PROFESSIONAL EDUCATION



Upstream Academy will recommend 13 hours of CPE credit for participation in this course. Prerequisite: None Skill Level: Overview Learning Objectives: After attending the HeadWaters Conference you will be able to identify and implement improvements to your leadership skills, as well as your firm's leadership development processes.

Upstream Academy is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: www.nasba.org

Thursday, July 8, 2010

- 7:00 – 8:00 am Continental Breakfast
- 8:00 – 9:15 am **Avoiding The Communications Tax: The High Cost of Poor Communication**
Sam M. Allred, Founder and Director of Upstream Academy
Artificial harmony. Lots of support for key endeavors, but little commitment. Unresolved performance issues. These challenges, all symptoms of poor communication, cost-and will continue to cost – your organization more than you ever dreamed. And yet, many leaders fail to see poor communication skills as the root cause of these and other problems. Join us for this session and learn what you can do to make improved communication skills a reality in your organization.
- 9:15 – 9:30 am Break
- 9:30 – 10:45 am **Trust: How to Get It, How to Keep It, How to Lose It**
Jennifer Wilson, Partner and Co-founder of ConvergenceCoaching, LLC
Trust is one of the most important characteristics of a unified, difference-making team. And yet, surveys repeatedly show it to be in short supply in many workplaces. In this session, we'll explore how trust is earned and maintained and examine trust-building behaviors such as integrity, accountability, and straight talk. We'll also discuss what to do when trust is eroded or broken, and look at the fundamentals of forgiveness. Don't miss this session!
- 10:45 – 11:00 am Break
- 11:00 – 12:15 pm **Business Development: Who Will Grow the Firm in the Future?**
Graham Wilson, President of The Wilson Group, LLC
Today's tough economy and fast-approaching rainmaker retirements have more than one managing partner losing sleep wondering who's going to bring in the new business tomorrow that is so essential to the firm's future. What should you be doing right now to proactively prepare for the better times that will come and the new faces you'll be looking at around the business development discussion table? Join us for this important session.
- 12:15 – 1:30 pm Lunch
- 1:30 – 5:00 pm **Discussion Forums: Shared Challenges, Shared Solutions**
Sam M. Allred, Timothy J. Bartz, Jack Hinsche, K. Tim Larsen, Jennifer Wilson, and Graham Wilson
Always one of the most popular features of Upstream conferences, our afternoon discussion forums provide an unmatched opportunity to share your firm's greatest challenges and learn how other firm leaders have successfully dealt with the same difficulties. Bring your most vexing issues and a notepad, and be ready to return to the office with great new ideas for solving your firm's challenges!
- 5:00 – 6:15 pm Reception



Friday, July 9, 2010

- 7:00 – 8:00 am Continental Breakfast
- 8:00 – 9:15 am Concurrent Sessions – Select One of Four Sessions
- 8:00 – 9:15 am **Getting Past Parity: Treating Your Best As the Best**
Sam M. Allred, Founder and Director of Upstream Academy
Every firm has them: the stars, the individuals who will most positively impact the firm for future generations – that is, if they stay. In what ways should your top performers be treated differently? What should their goals and career paths look like, how should their performance be evaluated, and who should be responsible for guiding them? How should you treat your best like the best they truly are?
- 8:00 – 9:15 am **Mergers and Acquisitions: Dancing (Carefully) Through the Minefield**
Timothy J. Bartz, CEO of Anderson ZurMuehlen & Co., P.C.
Frequently viewed as a smart growth strategy, mergers and acquisitions are fraught with peril, as evidenced by the number of failures each year. You already understand due diligence, "it's all about firm culture," and the rest of the conventional wisdom, so what else do you need to know? Plenty. Join us for this session to learn about the pitfalls others have overlooked, critical issues that frequently get missed, and important considerations that all too often fly under the radar.
- 8:00 – 9:15 am **Making a Difference with Training: A Success Story**
K. Tim Larsen, Managing Partner of Squire & Company, PC
The question is not, "Do you have a training program?" but rather, "Does your training program really make a difference, both for individuals and for the firm?" A strategically designed training program strengthens firm loyalty, aids in retention, builds critical skills, and helps individuals have more enjoyable, successful careers. Want to know how to put it all together? Come to this session and find out from someone who's done it.
- 8:00 – 9:15 am **Growing Your Average Revenue Per Client: Making Cross-Selling Work**
Graham Wilson, President of The Wilson Group, LLC
Long viewed by some as a necessary evil, cross-selling is actually a golden opportunity to do a better job of meeting your clients' needs. Focusing on average revenue per client adds structure, suggests goals, and helps to turn what are all too often haphazard efforts into a repeatable, improvable business process. Come to this session for a fresh approach to a much-discussed firm need.
- 9:15 – 9:30 am Break
- 9:30 – 10:45 am **Harnessing the Power of Social Media for Your Firm**
Jennifer Wilson, Partner and Co-founder of ConvergenceCoaching, LLC
Social media is revolutionizing the way we communicate with others. Some firms have already explored these technologies or have heard of others using them to create networks, generate business, and build their brands. This session will include online demonstrations and an in-depth discussion of the real-life, practice-building applications of Facebook, LinkedIn, Twitter and blogs for networking, marketing, business development and recruiting. Skeptical about the ROI on social media? Join us for this session!
- 10:45 – 11:00 am Break
- 11:00 – 12:15 pm **Solving Your Firm's Biggest Challenges: The Consultant's Approach**
A Team Exercise led by Sam M. Allred
Every firm has its own unique challenges; some are easily resolved, while others never seem to go away. Great firms believe their challenges are solvable, and as a firm leader, you spend a lot of time and energy working on those issues. Utilizing a highly interactive approach consisting of team exercises, brainstorming, and problem-solving, this session will teach you how to tackle your firm's biggest problems the way a consultant would approach them. Don't miss this one!
- 12:15 – 12:30 pm **Closing Remarks**
Sam M. Allred, Founder and Director of Upstream Academy
Come to this final session, where we'll recap the conference highlights and offer some tips on how to implement the great ideas you've heard at HeadWaters 2010.



Hotel Reservations

Call the Stein Eriksen Lodge at 800-453-1302. You will need to specify the HeadWaters™ Leadership Conference to receive the special conference rate of \$189 per night. We recommend making your reservations by June 4, 2010.

Travel

The resort is approximately 45 minutes from the Salt Lake City Airport. Park City Transportation offers shuttles from the airport to the resort every 20 minutes. Call 800-637-3803 and reference group ID number 6867 for reservations.

To Register

Mail or fax the registration form to: Upstream Academy – HeadWaters™ 2010 • P.O. Box 1147, Helena, MT 59624-1147 • Phone 406-495-1850 • Fax 406-442-1100

Cancellation Policy

Registrants will be refunded their registration less a \$100 cancellation charge if they notify Upstream after June 15, 2010.

Registration (please use a separate form for each attendee)

You can also register on-line at www.upstreamacademy/headwaters.asp.

Attendee _____

E-mail _____

Firm _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Total Firm Gross Revenue (for breakout session assignment) _____

Preference for concurrent sessions Friday morning:

- Getting Past Parity: Treating Your Best As the Best
- Mergers and Acquisitions: Dancing (Carefully) Through the Minefield
- Making a Difference with Training: A Success Story
- Growing Your Average Revenue Per Client: Making Cross-Selling Work

Conference Payment

- 1st Participant from Upstream Academy Network (UAN) Member Firm \$ 895
- Additional Participant from Upstream Academy Network (UAN) Member Firm \$ 795
- 1st Participant from Non-UAN Member Firm \$1195
- Additional Participant from Non-UAN Member Firm \$ 995

- Check Enclosed* Visa Mastercard

Card No. _____ Exp. Date _____

Name of Cardholder _____

Signature _____

*Please make checks payable to Upstream Academy. Canadian and overseas: use checks payable through a U.S. bank, or international money order.

