



UPSTREAM ACADEMY NETWORK OVERVIEW & APPLICATION

UPSTREAM ACADEMY NETWORK

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406-442-1100



TABLE OF CONTENTS

Application Instructions.....	i
Upstream Academy Network Overview	1
Services Available to Network Members.....	1
Membership Terms & Conditions	3
Membership Application	6
Membership Fees	9
Payment Options.....	9
Signatures	10

APPLICATION INSTRUCTIONS

1. Read Upstream Academy Network Overview and Services Available to Network Members
2. Read Membership Terms & Conditions
3. Provide requested Member Information
4. Choose Payment Option
5. Sign Completed Application Form
6. Mail or Fax Application Form and Payment to:

UPSTREAM ACADEMY
P.O. BOX 1147
HELENA, MT 59624-1147
PHONE: (406) 495-1850
FAX: (406) 442-1100



UPSTREAM ACADEMY NETWORK OVERVIEW

Upstream Academy Network (UAN) was formed with a simple focus: to create a network whose members are recognized as the most professional and best-run CPA firms in the world. The mission of UAN is to develop a network of CPA firm leaders who are committed to achieving greater excellence in every part of their firm. We are focused on enabling quality firms to become excellent by building and implementing best-of-breed firm processes and by taking a “leave nothing to chance” approach to creating desired results. We seek to provide member firms with the processes, tools, training, and guidance needed to move their firms to the highest standard of excellence within the profession. Unlike most associations in the profession, membership in UAN is not limited by factors such as geographic exclusivity, firm size, or firm visibility. Rather, the only qualification for membership is a real and enthusiastic commitment to developing excellence through continuous and proactive improvement. The result is a community of quality CPA firms with a common goal of becoming world class. Network members’ commitment to excellence, combined with the proven services and guidance provided by Upstream Academy, will produce a track record of results in an environment where synergy, teamwork, unity, and momentum are a reality.

SERVICES AVAILABLE TO NETWORK MEMBERS

Blueprint for Excellence Retreats

The foundation for creating greater excellence within UAN member firms is a process of continuous improvement called Blueprint for Excellence. This process helps firms remove barriers to progress and become proactive in creating positive change. The principles, strategies, processes, and tools taught in Blueprint for Excellence are the common language of network members. Network services support and build on the Blueprint foundation.

For this reason, all network members need to know and understand Blueprint for Excellence. This knowledge is gained by attending a two-day Blueprint for Excellence retreat. These retreats are scheduled regularly to accommodate member needs. As a member of UAN, you will receive a discount on the registration fee for our Blueprint for Excellence workshops.

LeaderSkills Lessons

Training firm members on leadership and other vital soft skills is a challenge for most firms, and few do it well. LeaderSkills lessons give firms all the tools they need to provide exceptional in-house training on key non-technical skills.



Lessons are released on an on-going basis. For a current list of LeaderSkills Lessons available, please visit www.upstreamacademy.com/leaderskills.asp

UAN members can purchase lessons at a cost of only \$125 per lesson, a 37% discount off the standard price of \$200 per lesson. As an added value, UAN member firms are authorized to use LeaderSkills lessons to help their clients.

Emerging Leaders Academy

Emerging Leaders Academy (ELA) is designed to help accounting firms deliver a professional leadership development program to emerging leaders within their firms. This three-year program uses a unique combination of conference call presentations, professionally prepared materials for in-house instruction, mentoring by a senior partner, and completion of individual assignments. The annual cost to UAN members is \$2,500 per participant and includes attendance at one of our five annual events.

Website and Academy Library

Upstream Academy Network members have access to a password protected area on the Upstream Academy website. The member area of the website includes a member profile section and the Academy Library. The library contains samples of useful items such as engagement letters, proposals, employee agreements, job descriptions, checklists, etc.

Management Presentations

Members receive free access (for all members of the firm who wish to participate) to at least eight conference call presentations each year, plus a free copy of the audio CD sent after each presentation.

Management Presentations serve two important purposes. First, they address important issues and provide direction and ideas that can be implemented in your firm. Second, members receive the PowerPoint files used in each presentation for future use within their firm, or for use with clients as a billable opportunity or a value-added service. Members may suggest topics for future presentations.

Members of the network can purchase audio CDs of past presentations at a 50% discount.



Managing Partner Academy

Managing Partner Academy is a forum for managing partners/CEOs to discuss best practices and strategic issues facing their firms. Through three conference calls and one face-to-face meeting, top leaders in Upstream Academy Network firms have the chance to network with others in their unique position. Only managing partners/CEOs of UAN member firms are eligible for enrollment.

The Academy for Business Development

The Academy for Business Development (ABD) is an intensive 18-month program focused on teaching vital business development skills to new partners and senior managers. The 18-month cost to UAN members is \$7,500 per participant (\$9,000 for non-member participants), and this includes attendance at all three face-to-face workshops.

Annual HeadWaters Conference

Upstream Academy Network hosts the annual HeadWaters Leadership Conference for firm partners, a conference that gets at the heart of firm management issues and strategies for greater success. This high-level conference is a unique blend of quality instruction, peer interaction, and experiential learning that helps partners lead their firms to new levels of success. UAN members receive a discount on the conference registration for each person from the firm who attends.

Annual BestPractices Conference

Focused on finding, attracting, developing, and keeping our most valuable asset, this two-day annual event is widely acknowledged as the best people-centered conference available in our profession today. UAN members receive a discount on the conference registration for each person from the firm who attends.

MEMBERSHIP TERMS & CONDITIONS

The following are the terms and conditions of membership in Upstream Academy Network (UAN).

1. Blueprint for Excellence Retreat. The processes and tools taught in the Blueprint for Excellence retreat are central to Upstream Academy membership. Member firms must commit to having at least one firm partner attend this retreat.



2. Fees Payable to Upstream Academy Network. The cost for membership is \$3,500 annually. Members must remain current in their financial obligations to Upstream Academy.
3. Consultation Services. Members may request individual consulting services from Upstream Academy. These services are subject to availability and are priced on an individual basis.
4. Participation. The ongoing success of UAN is impacted by the level of participation in network conferences and events. Member firms commit to attend UAN-sponsored conferences. A pattern of non-participation may result in cancellation of membership.
5. Non-competition and non-solicitation. Member firms may not use their membership in UAN as a means to solicit or recruit the clients or employees of other member firms.
6. Termination. Membership may be terminated by either party for any reason upon 60 days written notice to the other party.
7. Copyright Information & License Agreement. This is the Copyright Agreement between you (the Member) and Upstream Academy.
8. Grant of License: To download, modify [customize], reprint, and distribute hardcopies of Academy Library documents & tools, solely for the individual use and benefit of current Upstream Academy Network members. Transfers of Academy Library documents & tools in hardcopy or electronic mediums to non-members are NOT allowed without the express, prior written permission of Upstream Academy.
 - a. Scope: An exclusive license is granted to current Upstream Academy Network members to use Academy Library documents & tools solely within their firms.
 - b. Copyright: The Academy Library documents & tools owned by Upstream Academy are protected by U.S. copyright laws and international treaty provisions, and must be treated like any other copyrighted material.
 - c. Other Restrictions: Members may neither rent, lease, sell, distribute, nor otherwise transfer all or any portion of the Academy Library documents & tools to non-members, nor create any derivative work for other than internal member use.
 - d. Warranties: Provided "as is" without warranty of any kind. Upstream Academy specifically disclaims all warranties, either express or implied, including but not limited to any implied warranties of merchantability and



fitness for a particular purpose, with respect to the Academy Library Documents & Tools.

- e. Consequential Damages: No Liability For Consequential Damages: In no event shall Upstream Academy be liable for any damages whatsoever (including, without limitation, damages for loss of business profits or any other pecuniary loss) arising out of the use of the Academy Library Documents & Tools, even if Upstream Academy has been advised of the possibility of such damages.

- 9. Governing Law: The laws of the State of Montana shall govern this Agreement.

Note: The information contained on pages 5-7 of this document is intended to provide the basic terms and conditions for membership in Upstream Academy Network. We would also encourage you to review the UAN Constitution and Bylaws.



MEMBERSHIP APPLICATION

Firm Name: _____

Contact Name: _____

Address: _____

Address: _____

City: _____ **State/Province:** _____

Postal Code: _____ **Country:** _____

Phone: _____ **Fax:** _____

Email: _____ **Web site:** _____

Other Office Locations (City/State/Country):

1) _____	2) _____
3) _____	4) _____



Professional Affiliations:

1)

2)

3)

4)

Your firm legal form of practice is:

Partnership PPC LLC PC/PC/AC LLP

Number of Personnel:

Owners: _____ Professional Staff: _____ Administrative Staff: _____

Total: _____

Primary Specialty/Niche Practices:

1)

2)

3)

4)

Annual Gross Revenue from All Entities: \$_____



By Practice Area (optional):

A&A \$ _____

TAX \$ _____

MCS \$ _____

Other Services or Entities (please define)

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

How did you hear about Upstream Academy Network?

Referral Name & Company: _____



SIGNATURES

We agree to membership in Upstream Academy Network as outlined in the Terms and Conditions set forth in this document.

Member: _____

Title: _____

Date: _____

Upstream Academy: _____

Title: _____

Date: _____

Note: Please return this completed application form in its entirety.