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Upstream Academy's Premier Event
for Firm Leadership Teams



October 22-23, 2009 • San Antonio, Texas

BEST PRACTICES 2009

GETTING THE BEST FROM YOUR PEOPLE IN CHALLENGING TIMES



BestPractices Conference
P.O. Box 1147
Discovery Block
Great Northern Town Center
828 Great Northern Blvd., 4th Floor
Helena, MT 59624-1147

Only the first 120 registrants
are guaranteed participation
in this leading-edge event.

GETTING THE BEST FROM YOUR PEOPLE, TODAY AND EVERY DAY

If your firm is like many others,
you may believe you're already getting the best.

But are you?
And do you realize what's at stake if you're not?

Join us in San Antonio October 22-23.
Learn how to get the best from your people.
Today and every day.



Getting the Best, Every Day

Firm leaders sometimes worry about whether they're asking too much of their people. We believe that asking too little is just as great a danger.

Being appropriately demanding helps people get the most from their careers. It's also what will help the firm and its clients the most. Why would we even consider expecting anything less than the best from every firm member, every day?

Do you know what attracts talented people to your firm and what keeps them there, giving their best effort day in and day out? Are you providing your people with the right support, recognition, rewards, and opportunities for advancement?

What's your track record at finding, retaining, and developing star performers? Do you know what your best people want, what really motivates them? Do you understand the absolute necessity of holding your stars to a different performance standard, and are you willing to do that? How do you get over the "everyone has to be treated the same" hurdle?

So what's at stake in getting the best from your people, every single day? A lot. Profitability, for starters. The ability of current partners to develop and execute a viable succession plan. The future of your firm.

Come to San Antonio October 22-23 and learn from firm leaders who have done it, from those who have gotten the best from their people, every day.

The Location

With a strong sense of history and tradition, San Antonio captures the spirit of Texas while carefully blending in cosmopolitan progress. Now the eighth largest city in the United States, San Antonio has long been a crossroads for travelers and cultures. Nearly twenty million visitors a year enjoy its charms.

The crown jewel of San Antonio's many attractions is the River Walk, cobblestone and flagstone paths that border both sides of the San Antonio River as it winds its way through the middle of the business district and past the conference hotel. From The Alamo to Market Square and from Sea World and Six Flags to the Museum of Art, San Antonio has something for everyone!



Comprised of leaders from some of the most innovative and successful public accounting firms in the nation, our roster of presenters, panelists and discussion forum facilitators for this year's conference is truly impressive. Each of these individuals brings a unique blend of creative thought, practical experience, and proven success in developing and implementing best practices that produce desired results.



Sam M. Allred
Founder and Director
of Upstream Academy



Timothy J. Bartz
CEO of
Anderson ZurMuehlen & Co.



Robert L. Bunting
Former Chairman/CEO
of Moss Adams, LLP



Jack Hinsche
Managing Partner Emeritus
of Windes & McClaughey



Jody Keller
Chief Executive Partner of
Beard Miller Company LLP



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



John Sensiba
Managing Partner
of Ireland San Filippo, LLP



Jennifer Wilson
Partner and Co-founder of
Convergence Coaching LLC

CONTINUING PROFESSIONAL EDUCATION



Upstream Academy will recommend 13 hours of CPE credit for participation in this conference. Prerequisite: None. Advanced Preparation: None. Skill Level: Overview. Instructional Method: Group Live. Learning Objectives: After attending the BestPractices Conference, you will be able to identify your firm's best people and create processes to attract and retain quality employees.

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, October 22, 2009

7:00 – 8:00 am Breakfast

8:00 – 9:15 am **Artificial Harmony: The Elephant Is Still in the Room** **Sam M. Allred, Founder and Director of Upstream Academy**

You can't beat harmony, especially between the firm's leaders, right? Actually, wrong, if achieving that harmony comes at the expense of openly and honestly discussing and resolving important issues. What do firm leaders need to do to ensure that the elephants in the room don't get ignored? What are the keys to disagreeing without being disagreeable? You won't want to miss this session!

9:15 – 9:30 am Break

9:30 – 10:45 am **Developing Your Best People: The Dumbest Mistakes You Can Make** **Jody Keller, Chief Executive Partner of Beard Miller Company LLP**

You've heard a lot about what to be sure to do in developing your top performers; join us for this session and learn what to absolutely not do. Come hear about false assumptions that need to be discarded at the outset, conventional wisdom that's anything but wise, and small and large potholes lurking along the road to success. Don't miss this session!

10:45 – 11:00 am Break

11:00 – 12:15 pm **Helping People Overcome Their Personal Pitfalls** **Jennifer Wilson, Partner and Co-founder of Convergence Coaching LLC**

We all do some things well and others not so well. Why then is it so difficult to talk openly and honestly with co-workers about our job performance and theirs? This session will examine the barriers that keep us from addressing performance problems, discuss ways to get to the root cause of problem behaviors, recommend methods and language to use in discussing performance issues, and offer other hints and tips for transforming behavior.

12:15 – 1:15 pm Lunch

1:15 – 2:15 pm **Multiple Levels of Ownership: A Good Fit for Your Firm?** **Panel Discussion: Sam Allred, Jack Hinsche and Tim Bartz**

To extend ownership's opportunities and obligations to greater numbers of employees, more and more firms are creating multiple levels of ownership. Why should you consider doing this at your firm? How do you overcome resistance from current partners? What are the keys to successful implementation, and what are the pitfalls you must avoid? Join us for this panel discussion and learn how to make this innovative approach work at your firm.

2:15 – 2:30 pm Break

2:30 – 5:00 pm **Brainstorming Creative New Solutions** **Sam Allred, Tim Bartz, Jack Hinsche, Tim Larsen and Jennifer Wilson**

The only thing more difficult than solving today's challenges is trying to come up with all of the solutions yourself. Bring your most difficult questions, learn how other firm leaders have successfully dealt with the same issues, and be ready to jot down some great new ideas from the brainstorming that will occur as others tackle your biggest challenges.

5:00 – 6:00 pm Reception



Friday, October 23, 2009

7:00 – 8:00 am Continental Breakfast

Concurrent Sessions – Select One of Four Sessions

8:00 – 9:15 am **Applying Strategic Thinking to Your Firm's Training Program** **K. Tim Larsen, Managing Partner of Squire & Company, PC**

The question is not, "Do you have a training program?" but rather, "Does your program truly make a difference, both individually and for the firm?" A strategically designed training program does much more than consume resources; it strengthens firm loyalty, aids in retention, builds critical skills, and helps individuals have more enjoyable, successful careers. Want to know how it's done? Come to this session and find out.

8:00 – 9:15 am **Creating Your Firm's Future with a World Class Internship Program** **Timothy J. Bartz, CEO of Anderson ZurMuehlen & Co.**

Widely acknowledged as the firm's most reliable tool for identifying top talent, most internship programs are, unfortunately, casually designed, poorly thought-out, and administered haphazardly. The result? Golden opportunities to select the best and the brightest, build loyalty early, and promote the firm to future interns are needlessly wasted. How do you create a world class internship program? Come to this session and find out.

8:00 – 9:15 am **Getting Past Parity: Treating Your Best As the Best** **Sam M. Allred, Founder & 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? Don't miss this session!

8:00 – 9:15 am **HR in an Uncertain World: 2009 Top Trends** **Jennifer Wilson, Partner and Co-founder of Convergence Coaching, LLC**

Although the recent economic downturn has turned the spotlight on business development, firms must also remain focused on their greatest asset – their people. Come to this session and we'll discuss today's hottest issues, including the biggest HR mistakes firms are making, right-sizing and salary freezes/cuts, recruiting top talent as the economy recovers, and preparing for impending retirements. Don't miss this session!

9:15 – 9:30 am Break

9:30 – 10:45 am **Best Practices for Successfully Integrating Outside Talent** **Panel Discussion: Sam Allred, John Sensiba and Jody Keller**

Bringing in an experienced person from outside the firm to be a partner or manager offers attractive possibilities, both for the firm and other firm leaders. How do you set such a person up for success and avoid the prolonged struggle that so often accompanies such a hiring decision? What are the keys to successfully integrating a leader from outside the firm? Join us for this panel discussion and learn from others' successes.

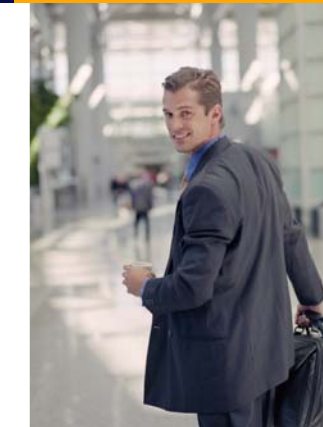
10:45 – 11:00 am Break

11:00 – 12:15 pm **The Role of Partners in Developing the Firm's Best People** **Robert L. Bunting, Former Chairman/CEO of Moss Adams, LLP**

Your up and coming stars: you certainly can't afford to lose them, nor can you afford to receive less than full value on their potential to build the firm. What is the appropriate role of partners in developing your firm's best employees? Why is it so important for partners to be actively involved in employee development? What do partners need to be sure to do – and not do – as they assist in this vital process? Don't miss this session!

12:15 – 12:30 pm **Closing Remarks** **Sam M. Allred, Founder and Director of Upstream Academy**

12:30 – 1:30 pm Lunch



Hotel Reservations

Hotel Contessa reservations can be made by calling (210) 229-9222. You will need to specify the BestPractices Conference to receive the conference rate of \$209 per night. We recommend making reservations by September 20, 2009.

Travel

The Hotel Contessa is located approximately 9 miles from San Antonio International Airport. SA Trans Airport Shuttle tickets are available at the ticket kiosk in the airport, or reservations can be made at www.saaairportshuttle.com.

To Register

Mail or fax the registration form to: Upstream Academy-BestPractices 2009 • 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 September 30, 2009. For more information regarding complaint and refund policies, please contact our offices at 406-495-1850.

Registration (please use a separate form for each attendee)

Attendee _____

E-mail _____

Firm _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Title _____

Total Firm Gross Revenue (for breakout session assignment) _____

Preference for concurrent sessions Friday morning

- Applying Strategic Thinking to Your Firm's Training Program
- Creating Your Firm's Future with a World Class Internship Program
- Getting Past Parity: Treating Your Best As the Best
- HR in an Uncertain World: 2009 Top Trends

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 American Express

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.

