

WHAT PARTICIPANTS AND FIRM LEADERS ARE SAYING ABOUT THE PROGRAM

"As the guide for a first-year ELA participant, I'm very pleased with the results we've seen to date. I've taken an active role as a guide, have participated in many of the Leadership Training Forums, and feel like I'm getting as much out of them as our participant is. I wish I'd had access to a program like this when I was working towards becoming a partner!" *Kathy J. Klang, Managing Partner of Cummings, Keegan & Co., P.L.L.P.*



"Emerging Leaders Academy was a great asset to me, my firm, and my growth into the Managing Shareholder position of our firm. My guide in the process was my predecessor in the managing shareholder role, so it led to a smooth, well thought-out transition. We've seen so much value from this program that we have and will continue to send our future leaders through this program. In addition, we have seen great returns on the various projects that part participants have completed as part of the program." *Scott Goldsmith, Managing Partner JamisonMoneyFarmer PC*

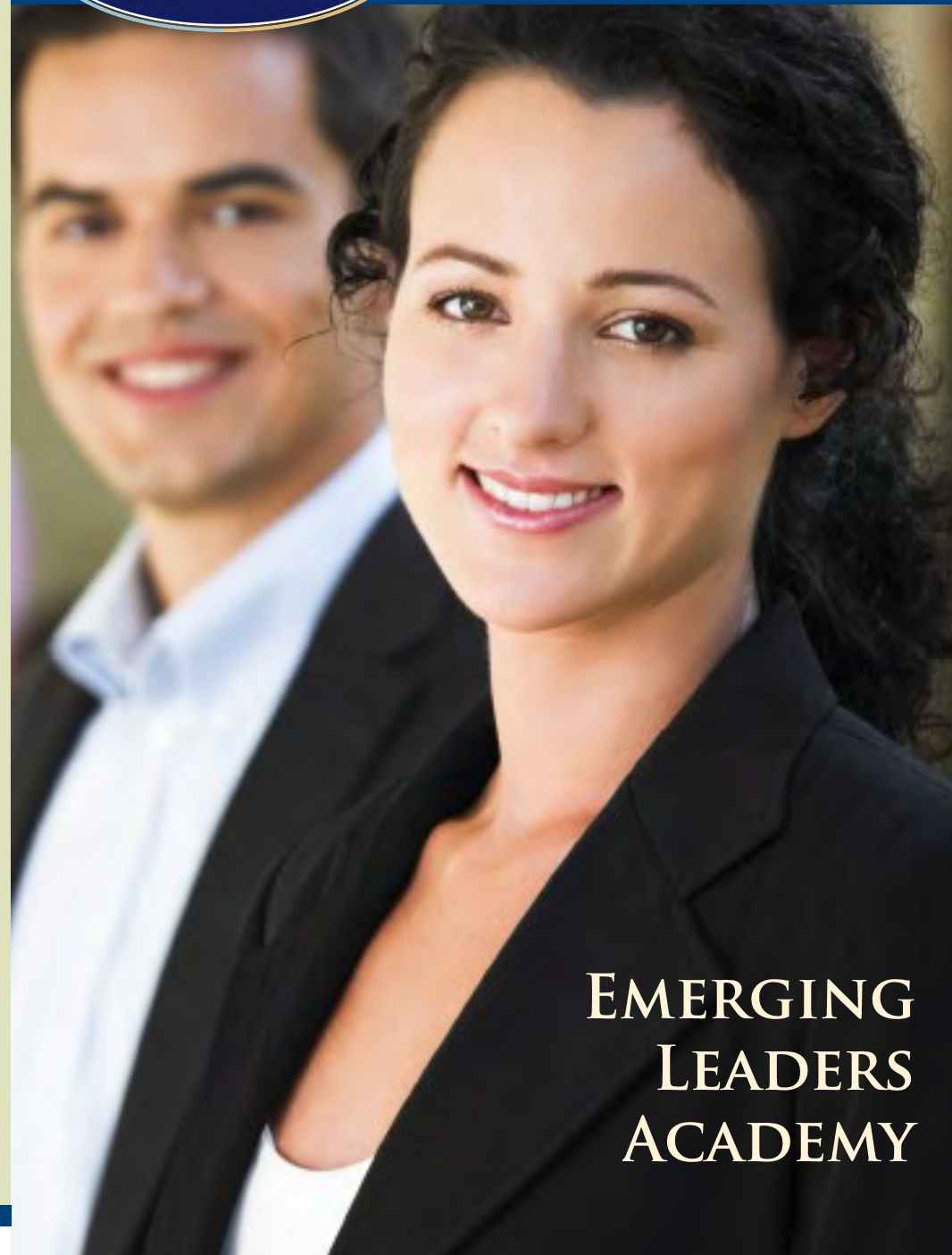
"The ELA program has broadened my understanding of the profession, relevant elements of firm management, and what to expect from myself and my partners. It gives me tangible tools to encourage growth and excellence and has helped me visualize the future. It has helped me appreciate all the good we have already accomplished as a firm and have more confidence in new opportunities and our direction." *Lynn Mills, President at Walz Group*



"I have really enjoyed the ELA program. Sam, Tim and their team provide excellent information that is practical and relevant. And they do it without 'preaching.' Excellent!" *Mike Gilmore, Partner at BDO Canada*



HELPING YOU DEVELOP
HIGH-YIELD LOW-MAINTENANCE
FIRM LEADERS



EMERGING LEADERS ACADEMY

A new program begins in June, with a registration deadline of May 15.

Fees are \$3,400 per year (UAN members pay \$2,900)

To register visit www.upstreamacademy.com/ela_info.asp



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EXCEPTIONAL THREE-YEAR
LEADERSHIP DEVELOPMENT
PROGRAM EXCLUSIVELY FOR
ACCOUNTING FIRMS

WITH AN ENTIRE GENERATION MOVING EVER CLOSER TO RETIREMENT, OUR PROFESSION IS STANDING ON THE THRESHOLD OF DRAMATIC CHANGE

The next decade will see the departure of thousands of stakeholders, and many are wondering if the next generation is ready to take the reins of leadership.

Most firms recognize the need to prepare their future leaders. Some have tried—with only limited success—to develop their own programs. Others have looked beyond the profession, only to experience the frustration of trying to adapt outside programs. Many agree that with only rare exceptions, we haven't done what's really needed to train our future leaders.

Quality programs exist, both within and outside of public accounting. But as we've talked with managing partners, they've shared with us their concerns about what's currently available and what they'd like to see in a program to prepare future firm leaders.



We believe an exceptional leadership development program must possess the following key characteristics:

- the program must be focused on helping participants become high-yield, low-maintenance leaders
- learning must be continuous, delivered in digestible doses regularly throughout the year
- individuals must be able to apply what they've learned by accomplishing challenging goals throughout the year
- the learning experience needs to be easily customizable to meet individual and firm needs
- current firm leaders must be involved in the training to ensure participants are able to apply the lessons learned within the firm
- each participant needs to have a guide, a trusted and respected leader from within the firm
- the progress of each participant must be measurable
- participants need to be able to network with other emerging leaders outside the firm
- the program must be affordable and require minimal travel



THESE ARE THE CHARACTERISTICS THAT
MAKE EMERGING LEADERS ACADEMY
EXCEPTIONAL

WHAT MAKES EMERGING LEADERS ACADEMY UNIQUE?

How do you gauge the success of a leadership development program? We believe the best measure is the changes observed in participants by those who work alongside them and know them best.

Since its inception, Emerging Leaders Academy has made a difference in the lives and careers of hundreds of our profession's rising stars. We know that because firm leaders have told us so, and we're confident your firm will have the same experience.

1 LEADERSHIP TRAINING FORUMS

During each year of the program, eight to ten one-hour webinars led by Sam Allred and Jeremy Clopton provide a forum for discussing key principles of leadership.

Participants receive the PowerPoint, questions to consider, and other materials in advance of the presentation and access to the recorded presentation online afterward.

LEADERSHIP TRAINING FORUMS: YEAR THREE
LEADERSHIP & FINANCIAL MANAGEMENT

- Personal Integrity
- The Importance of...
- Avoiding the 10...
- Improving Your...
- Moving Out of...
- What All New F...
- Abandoning Pa...
- Driving Change

LEADERSHIP TRAINING FORUMS: YEAR TWO
TEAM DEVELOPMENT & BUSINESS DEVELOPMENT

- Learning to Give
- Effective Delega...
- Conducting Effe...
- Principles of Eff...
- Proactively Man...
- Dealing Effectiv...
- Business Develop...
- Committing to a...
- The Proper Way...
- Helping Team M...

LEADERSHIP TRAINING FORUMS: YEAR ONE
PERSONAL EFFECTIVENESS & CLIENT MANAGEMENT

- Setting and Accomplishing Worthwhile Goals
- Becoming a High Yield, Low Maintenance Firm Member
- Using Time Wisely: Key Principles of Time Management
- Capitalizing on Personal Strengths and Talents
- Performing Damage Control for Areas of Personal Weakness
- Becoming a Recognized Expert
- Client Management: Selecting and Keeping the Right Clients
- Moving from Historian to Trusted Advisor
- Providing Exceptional Client Service
- Helping to Make Client Transitions Successful

2 LEADERSHIP PROJECT

Each year, participants complete a challenging (10+ hours) leadership project that benefits the firm, and allows individuals or teams of emerging leaders to further develop important skills. Upstream assists by providing project advice, suggestions and examples, and guides work closely with participants to ensure accountability and accomplishment of the desired objectives.

3 GUIDES

The process of learning new principles and skills is almost always easier if accompanied by someone who has previously walked the same path. Managing partners assign emerging leaders to experienced guides, respected stakeholders from within the firm who work with participants throughout the three-year program to help them set and accomplish goals and complete assignments. Upstream Academy provides training and materials to individuals who are selected to serve as guides.

4 LEADERSHIP DEVELOPMENT GOALS

We believe leadership skills are best learned by "doing." Throughout the year, participants will set and accomplish related goals after each Leadership Training Forum.

Upstream provides a list of potential goals after each forum and participants choose a goal after each session to work on before the next forum. Participants complete all the goals chosen prior to the program year conclusion in May.

Guides work closely with participants, helping them select proper goals and holding them accountable for accomplishing those goals. With guide-ensured accountability, accomplishing challenging goals allows participants to apply what they've learned and give value back to the firm.

5 MEASURED PROGRESS

It's difficult to know if you're on course unless there's some way to measure progress. Upstream Academy provides tools (including an online "members only" page) for participants and their in-house guides that allow them to track progress on goals and projects throughout the year, network with other program participants and stay connected. Firms also receive guidance on best practices for creating an organized, efficient process in-house to help their emerging leaders grow during this three-year period.

Online Progress Tracker (OPT) - Participant Status
2018 - Class of 2018 Year 1

Leadership Training Forums

During each year of the program Sam Allred and Jeremy Clopton will present 10 one-hour forums via webinar. If participants are unable to attend the live forum, they must listen to the recording. After each presentation, we encourage that they identify those things they learned from each forum and develop a simple plan of action, which can be shared with the guide.

Please note all Leadership Training Forums will be held at Edison Pacific, Lane Mountain, Lane Central, and Lane Salem.

If you have any difficulty accessing the content from the website, please right-click and select "save target as" to save the file to your computer.

| Forum Name | Date | Completed | Quizzes |
|---|------------|-----------|---------|
| Using Time Wisely: Key Principles of Time Management | 6/22/2018 | 100% | 100% |
| Personal Integrity: A Key Component of Great Leadership | 7/6/2018 | 100% | 100% |
| Capitalizing on Personal Strengths and Talents | 8/20/2018 | 100% | 100% |
| Performing Damage Control for Areas of Personal Weakness | 9/19/2018 | 100% | 100% |
| Setting and Accomplishing Worthwhile Goals | 10/16/2018 | 100% | 100% |
| Basic Contributions to the Firm: Budgets, Metrics, Goals and More | 11/16/2018 | 100% | 100% |
| Client Management: Identifying and Keeping the Right Clients | 12/17/2018 | 100% | 100% |
| Moving from Historian to Trusted Advisor | 1/16/2019 | 100% | 100% |
| Providing Exceptional Client Service | 2/14/2019 | 100% | 100% |
| Helping to Make Client Transitions Successful | 3/14/2019 | 100% | 100% |

NEED MORE INFORMATION?

To register for a free informational webinar or receive access to a recording, contact us at 406-495-1850 or info@upstreamacademy.com.

WHAT MAKES EMERGING LEADERS ACADEMY UNIQUE?

6 FREE REGISTRATION AT A VIRTUAL EVENT



Networking with peers in a stimulating group environment is an important experience for all professionals, and especially for future firm leaders—but doing so in 2022 may prove inadvisable. This year Upstream will hold virtual conferences with agendas designed to cover the same topics you would find in an in-person ELA Conference. The virtual conference will include interactive sessions and networking opportunities (all from the comfort of home or office).

If participants wish to participate in an in-person, add-on event, they can register for the Emerging Leaders Conference in January 2023.

If travel restrictions have lifted, participants will be able to attend in-person events in their second and third year (HeadWaters, BestPractices or one of the Emerging Leaders Academy conferences).

7 PROVEN EXCELLENCE AND AN UNCONDITIONAL GUARANTEE

Emerging Leaders Academy has a proven track record of providing exceptional leadership development. Since 2007 the program has graduated over 1000 people from 190 firms.

We're confident that Emerging Leaders Academy will be of immeasurable value to your firm and its future leaders. Like everything we do at Upstream Academy, this program is unconditionally guaranteed to your full satisfaction. If you're not completely satisfied, we will, at your option, either waive your fee or accept that portion of the fee that reflects your level of satisfaction.

In these uncertain economic times, Upstream would like to help, so we are offering the option to defer payment on participant registration for up to a year. Just let us know if you are interested in this option.

Registration is \$3,400 per year (\$2,900 for UAN members).

8 EXPERIENCED CONSULTANTS

Sam Allred and Jeremy Clopton bring many years of leadership and consulting experience to this exciting program.

Sam Allred, Director of Upstream Academy, interacts with hundreds of CPA firms around the world each year via professional conferences, partner retreats, and webinars. Sam is widely regarded as one of our profession's top strategic thinkers and has consistently been named as one of the top ten consultants in the profession by IPA.

Jeremy Clopton, Director at Upstream Academy, has a passion for engaging all generations to move their firms forward. His real-world experience comes both as a consultant and in the audit department of a top accounting and consulting firm and he uses this experience to provide a vision for improvement.



Upstream Academy will recommend CPE credit based on the level of participation in this course. Prerequisite: None Advanced Preparation: None. Skill level: Overview

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

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