



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



July 12-13, 2018 • Park City, Utah

HEADWATERS 2018

BECOMING AN EXCEPTIONAL
BUSINESS ADVISOR

WHY SHOULD YOU BECOME A FIRM OF BUSINESS ADVISORS?

Most accounting firms recognize our profession is changing.

To remain relevant firms must change and become more skilled
at helping clients succeed (not just remain compliant).

Join us in Park City, Utah, on July 12-13 and we'll explore
why and how to stay relevant, competitive and profitable
as a firm of true business advisors.





The Conference

With the changes coming to our profession, ideally each team member becomes a proactive, forward-thinking business advisor, no matter their focus. But how do you implement this firm-wide? What do you need to do to encourage everyone in the firm to develop expertise that is relevant and valuable to clients, so they can proactively analyze current client service offerings, evaluate potential new client needs and not just guide clients through their accounting questions, but also offer innovative strategies for business growth?

Join us for HeadWaters 2018 and industry experts will provide step-by-step guidance to move your firm from compliance to advising. Here's a sampling of topics:

- Asking the right strategic questions
- Proving you are a consultant, not a commodity
- Overcoming the barriers to change
- Successfully analyzing a potential merger or acquisition in light of upcoming industry changes
- Adding expertise by hiring an outside business advisor
- Creating excitement and getting partner buy-in for change
- Creating a sustainable controllership service
- Succeeding with a technology consulting service
- Growing better business consultants (at all levels)
- Cross-selling firm services



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To register visit www.upstreamacademy.com

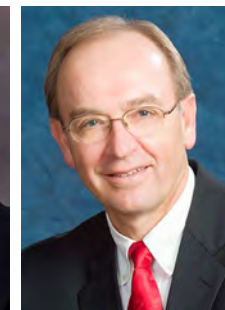
CONFERENCE SPEAKERS/FACILITATORS

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.

Don't re-create the wheel. Learn from those who have thought through the issues and developed practical, real-world solutions you can immediately implement in your practice.



Sam Allred
Director at
Upstream Academy



Tim Bartz
Director at
Upstream Academy



Don Bielen
Principal at Perkins &
Company, P.C.



Martin Brown
President
at PYA



Steve Castino
Executive Shareholder
at Vestal & Wiler



Jeremy Clopton
Owner of
What's Your SQ



Robert Culpon
Chief Information
Officer at AZTS



Dena Jansen
Founder and Voice
of Dena Speaks



Tim Larsen
Partner at Squire &
Company, PC



Randy Nail
CEO of
HoganTaylor LLP



**Michelle Golden
River**
President of Fore LLC



John Sensiba
Managing Partner at
Sensiba San Filippo,
LLP

CONFERENCE AGENDA

Wednesday, July 11, 2018 Special Pre-conference Add-on Event

1:00 – 5:30 pm **Introduction to Advanced Pricing MethodsSM with Michelle Golden River**

New this year, Upstream is partnering with Michelle Golden River to offer an exclusive half-day workshop on “how to price in advance.” This high-ROI workshop is an abbreviated version of the full-day workshop she teaches internally to firms and is \$600/person for the half-day session—an investment you could recoup in a single proposal when you apply what you’ll learn. Michelle will introduce some mindset-shifting concepts but mostly get down to the nitty gritty in three key areas: considerations and due diligence before committing to a price (to mitigate scope risks), step-by-step how to embark on a highly effective solving-not-selling process, and the elements each Advanced Pricing proposal should contain. You and your team won’t want to miss this session!

Thursday, July 12, 2018

7:00 – 8:00 am Breakfast

8:00 – 8:15 am Welcome

8:15 – 9:30 am **What’s Your SQ?**

Jeremy Clopton, Owner of What’s Your SQ

Do you know your strategic question? Chances are you’re struggling to overcome challenges: integrating millennials, effectively managing data, moving the needle on innovation, etc. But it’s also likely you are focused on the wrong questions. Rather than taking the traditional approach to these topics, Jeremy will encourage you to start with different questions. Through engaging discussion, humor and actionable takeaways, Jeremy will use the SQ Method to provide attendees the framework they need to ask the right questions, get the answers they need, and overcome challenges.

9:30 – 9:45 am Break

9:45 – 11:00 am **You’re Worth More than You Think: Proving You’re a Consultant, not a Commodity**

Michelle Golden River, President of Fore LLC

Worth is a mindset that starts with your own beliefs. But it has to be based on much more than flowery presentations with loosely defined outcomes. Use the right discovery techniques and more effective language to increase the worth others see when they invest in YOU. Learn powerful approaches that position the impact you bring to your clients. And help ensure you get paid based on your true worth. Join Michelle for this session and she’ll explore how to prepare for client meetings, develop creative solutions to propose, use solution-mapping to broaden your mindset, and provide more holistic approaches that focus on clients’ outcomes.

11:00 – 11:15 am Break

11:15 – 12:30 pm **Getting Past the Past: Overcoming the Barriers to Change**

Sam Allred, Director at Upstream Academy

Creating sustainable change is a constant struggle for organizations and individuals. So how do you get past the flavor-of-the-week change initiatives, to move the firm to real progress? How do you build trust and create excitement when your firm has had too many failed initiatives, short-lived change efforts, and entrenched bad habits? Join Sam as he discusses what’s holding firms back so you can successfully lead change initiatives, diagnose the real causes behind resistance to change, transform culture, and influence behavior across the organization. Learn to create rapid and sustainable change.

12:30 – 1:30 pm Lunch

Thursday, July 12, 2018 (continued)

1:30 – 2:45 pm Concurrent Sessions (choose one of five)

Tapping into the Power of Connections: Cross-Selling

Steve Castino, Executive Shareholder at Vestal & Wiler

One of the most underutilized sources for new work is existing clients. As current clients, they already have connections within the firm and generally trust and respect their current service provider. Most firm members recognize that cross-selling is good for the firm, good for the client and good for the firm member receiving new work. So why is it so difficult to get everyone involved in the effort? Join Steve as he shares how to build trust, share knowledge and open opportunities so firm members will confidently and expertly recommend the firm’s services to their clients and prospects.

Joining Your Client’s Management Team: Creating a Sustainable Controllershship Service

Tim Larsen, Partner at Squire & Company, PC

Many firms trying to find the right formula to develop and grow successful niche consulting practices turn to controller services. With a firm’s wealth of accounting knowledge (and desire to become more advisory), starting a controllership service is a natural choice. Join Tim for an in-depth discussion of the challenges in launching a controllership service, as well as best practices to ensure success. He’ll share his personal experiences, including the things that went smoothly and those that could have used a little more refinement and planning.

Tech Savvy to Tech Profitable: Succeeding with a Technology Consulting Niche

Robert Culpon, Chief Information Officer at AZTS

As a firm grows, technology can either be one of its greatest allies or most formidable foes. Which seems to make a technology consulting niche a perfect solution for firms who have conquered this challenge. Since you know the problems, you can craft the perfect solutions, right? But it takes more than a good idea to get a technology consulting practice off the ground. Join Robert as he shares his own experience of starting a successful technology consulting practice and the people, resources, processes and backing you’ll need to be successful.

Stop Producing an Irrelevant Professional: New Practices for the New Accountant

Dena Jansen, Founder and Voice of Dena Speaks

Getting all of the partners on board simply isn’t enough. For your firm to move to an advisory culture you need to start sooner. The next generation has already shown they want to be connected to clients and feel like they are making a real difference for individuals. So how do you ensure you don’t force them into the compliance mode? How do you guarantee your training model can quickly adapt to the new push for less compliance work and more client-centric consulting? Join Dena as she discusses what needs to change to get a new product – a new generation of business advisors.

CONFERENCE AGENDA

Thursday, July 12, 2018 (continued)

1:30 – 2:45 pm Concurrent Sessions (choose one of five)

Ten Ways to Move Your Firm Toward Business Consulting

Tim Bartz, Director at Upstream Academy

Virtually all strong organic growth in firms across North America is being fueled by consulting services. To thrive in today's business climate firms need to move beyond traditional offerings. But where do you start? How do you capitalize on the myriad changes and opportunities coming to the profession? What are the best practices for moving toward consulting? How do you develop consulting services that are relevant and valuable to your clients? How do you get technical professionals excited about becoming "trusted advisors"? Join Tim for this session to learn how to jumpstart a more successful consulting practice.

2:45 – 3:00 pm Break

3:00 – 5:00 pm **Discussion Forums: Shared Challenges, Shared Solutions**

Sam Allred, Tim Bartz, Marty Brown, Steve Castino, Dena Jansen, Tim Larsen and John Sensiba

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!

5:15 – 6:15 pm Reception



Friday, July 13, 2018

7:00 – 8:00 am Breakfast

8:00 – 9:15 am **Looking Before You Leap: Merger and Acquisition 411**

Randy Nail, CEO of HoganTaylor LLP

Potentially one of the best ways to grow your firm, mergers and acquisitions are also minefields for the poorly prepared. As technology forces a devaluation of compliance work, those looking to acquire or merge up will need to carefully re-examine firm value. Join Randy as he discusses his firm's approach to firm valuation, the types of mergers occurring and some of the major things firms should consider before a merger. He'll examine the issue from both the buyer's and seller's perspective and provide real world experience navigating the world of M&A to help you plot your course over the coming years.

9:15 – 9:30 am Break

9:30 – 10:45 am **Adding a New Breed to the Herd**

Don Bielen, Principal at Perkins & Company

Firms have done well with their traditional stable of services, but changes in technology are driving many to expand their offerings. Have you considered adding a new breed – a non-accounting professional who can bring new ideas, new services, new clients and new expertise? Join Don to learn how he successfully incorporated Business Transition and Succession Planning services to an expanding West Coast firm. He'll discuss how to integrate new services to drive revenues, differentiate from competitors, increase client retention, and navigate the cultural and organizational challenges related to incorporating these new offerings. Come hear directly from the horse's mouth!

10:45 – 11:00 am Break

11:00 – 12:15 pm **New Expectations for a New Reality: The Ayes Have It – But Not the "I's"**

Marty Brown, President of PYA

The "Ayes" have it! The Yes Vote Wins! A bold, intentional, unified partner group is the key to effectively addressing the new reality in which we and our clients operate. How can we as firm leaders help move our partners to say "Yes" to the future? We must work together, no lone rangers. We must change behaviors, no "I's" but "We's." We must purposefully plan, no separate silos. Join Marty as he shares insights on developing an integrated partner group with spirited, committed involvement to ensure that our firms make the transition to the new realities of public accounting.

THE LOCATION

Park City

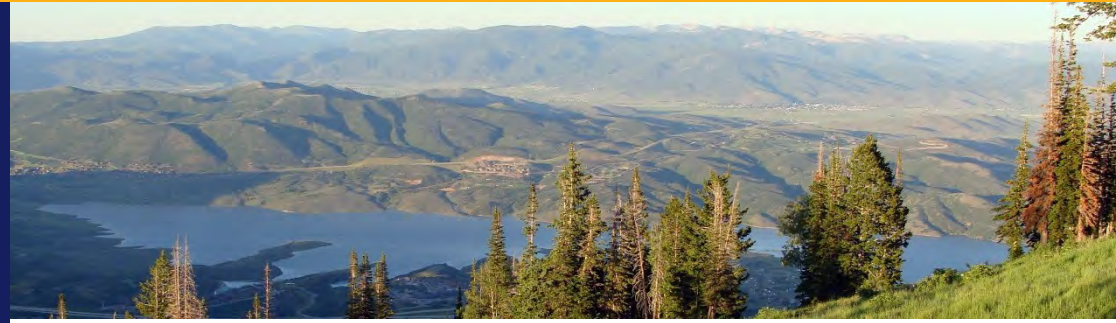
We return this year to beautiful Park City, Utah, nestled under Rocky Mountain peaks and an easy 45-minute drive from Salt Lake City Airport. The Park City area offers something for everyone including over 100 restaurants, factory outlet stores, quaint shops, fly fishing, mountain biking, hiking, horseback riding, water sports and more.

Hotel Information

This year's conference will be held at the Stein Eriksen Lodge located at 7700 Stein Way in Park City, Utah. Reservations can be made [online](#) or by calling 800-453-1302. You will need to specify Upstream Academy to receive the special conference rate of \$290.00 (which includes the \$21 resort fee). We recommend making your reservation by June 4, 2018. If you have any problems with hotel reservations, please don't hesitate to contact us for assistance.

Air Travel Information

The hotel is located approximately 45 minutes from the Salt Lake City airport.



Conference Meal Information

Breakfast and lunch will be provided on Thursday and breakfast will be provided Friday. All meals will be served buffet style. You and your adult guest are also welcome to join us for the reception Thursday evening. If you have special meal requests, please contact Kelsey Mundt at (406) 495-1850 or email at kelseym@upstreamacademy.com.

To Register

Go to www.upstreamacademy.com/headwaters.asp or call 406-495-1850.

Cancellation Policy

Registrants will be refunded their registration less a \$100 cancellation charge if they notify Upstream after June 13, 2018.

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 submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

