



ADVANCED PARTNER ACADEMY

A Program for Advanced Partners to Grow in Their Roles

New program year opens each June
Registration deadline June 1st

To register, visit <https://upstreamacademy.com/apa>
Contact us at info@upstreamacademy.com or (406) 495-1850



INVEST IN YOUR FIRM'S FUTURE BY INVESTING IN YOUR **HIGH POTENTIAL PARTNERS.**

Partners are the horsepower of the firm, but they often receive very little input once they gain owner status. They can feel like they're running on fumes as they're asked to take on new roles and leadership authority without a guidebook.

Advanced Partner Academy is designed to help partners more effectively assume significant leadership roles within the firm. Participants will learn best practices and key principles to lead initiatives, make firm-wide changes, create strategic plans and run a successful team and firm.

PARTNERS MAKE OR BREAK A FIRM.

MAKE SURE YOURS HAVE THE TOOLS
TO DRIVE FIRM SUCCESS.





Advanced Partner Academy ensures leaders achieve consistent growth through:

- continuous learning, delivered in digestible doses throughout the year
- applied learning with challenging goals
- customizable options to meet individual and firm needs
- measurable progress with integrated tracking tools
- networking opportunities with other partners outside the firm
- affordability with minimal travel requirements

MAKE THE MOST INFLUENTIAL PEOPLE
AT YOUR FIRM THE MOST
SKILLED



The Advanced Partner Academy is part of our Upstream Leadership Academy programs. Our New Manager Academy and Emerging Leaders Academy cater to individuals at different points in their career. Look into our other academies to help your team grow through every step of their career.

WHAT'S INCLUDED

1. TRAINING FORUMS

This program features webinars led by Jeremy Clopton and Upstream Faculty which provide a place for discussing key Leadership Principles. Participants receive the PowerPoint, questions to consider, and other materials before the presentation and access to the OnDemand training afterward.

FORUMS

- Leading Positive Change
- Conducting Effective Strategic Planning
- Building Partner Unity
- Developing Future Partners
- Leading Firm Growth Initiatives
- Executing Challenging Firm Decisions
- Improving Your Use of Others' Time, Energy and Focus
- Setting and Accomplishing Partner-Level Goals
- Proactively Improving Your Client Mix Each Year



2. VIRTUAL CONFERENCE

At the midpoint of their APA experience, participants will attend a virtual conference with interactive sessions and networking opportunities (all from their home or office).

3. IN-PERSON CONFERENCE

Participants also attend a one-day in-person conference at the conclusion of their APA journey.

Always one of the most highly-rated aspects of the program, this conference provides a way for participants to network with peers in a stimulating group environment and gain insights on both current and future firm issues.

The Advanced Partner Conference features more interaction and discussion than most industry events. We highly encourage attendance, since the conference is geared to issues relevant to partners and managing partners to grow and manage their firm.

4. HEADWATERS CONFERENCE

Participants receive free attendance to our HeadWaters Leadership Conference immediately following their Advanced Partner Conference. HeadWaters, Upstream's premier leadership conference, is widely regarded as one of the best firm management conferences for accounting firms.

WHAT'S INCLUDED

5. EXPERIENCED CONSULTANTS

Jeremy Clopton, the Managing Director of Upstream Academy, brings many years of leadership and consulting experience to this exciting program. He has a passion for engaging all generations to move their firms forward. His real-world experience includes working 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 Faculty are respected Managing Partners, Partners, and Consultants in the accounting industry who serve as guest speakers for key sessions, bringing practical knowledge and insights from real-firm experience, ensuring participants receive a well-rounded approach to firm management.



6. LEADERSHIP DEVELOPMENT GOALS

Throughout the program, participants set and accomplish related goals after each training forum. Upstream provides a list of potential goals after each forum and participants choose a goal to work on before the next forum. Participants complete all the goals chosen prior to the program year conclusion in July.

7. MEASURED PROGRESS

Upstream Academy provides tools (including an online "members only" page) for participants to track progress on goals and projects throughout the year, network with other program participants, and stay connected.

8. UNCONDITIONAL GUARANTEE

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.

PARTICIPANT TESTIMONIALS



"This APA program is wonderful at equipping participants with the tools necessary to be as effective in their ownership role as possible."

Mark Brumbelow, PYA



"I leave each APA session energized to put what I learned into practice at our firm. The APA sessions help me focus on what is important for me to tackle as a partner of a firm that strives to be a leader in the industry."

Laura Everett, Albin, Randall & Bennett



"I love how every seminar ends with a list of things you can take back to your firm. Dealing with firm strategy and partner responsibilities are top of mind at our partner meetings, and almost every seminar was aimed at this."

Omar Chaudry, RLB LLP



"The whole experience was wonderful, having interactive conversations that were tangible enough to bring back home to put into practice."

Kate Durbin, Douglas Wilson and Company PC



"The program has helped me feel 'not alone' in my journey as a new leader in my firm."

Adrienne Breakwell, Kingston Ross Pasnak LLP



Sign up a Partner from your firm for \$4600 (\$3900 UAN)

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NEED MORE INFORMATION?

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

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