



ADVANCED
PARTNER
academy

An Advanced Leader's Program for
Partners in Accounting Firms

Partners make or break a firm. Make sure your partners have the tools to drive firm success.

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 for leading initiatives, making firm changes, creating strategic plans and running a successful team and firm.



Who should register? This program is ideal for firm stakeholders wishing to become more effective in their roles. Participants should be prepared to be actively engaged in improving skills and applying lessons learned to their careers.

What is the timeline? The registration deadline for this one-year program is June 1 with the first events in late June. The program will run through July of the next year.

What is included? This program features incremental, consistent training throughout the year:

- Nine forums designed to teach best practices for firm management and career development
- Guidance in creating action plans after each training forum to ensure skills are put into practice
- Virtual half-day session to encourage networking and build problem-solving skills
- One day in-person event to take a deep-dive into key skills and to promote network building
- Free registration to our HeadWaters Conference in July

What is the cost? The one-year program is \$3,900 per participant. UAN Members pay \$3,300.

Invest in your firm's future
by investing in your
high potential partners.

Key Elements of *Advanced Partner Academy*

Don't neglect the continuing development of your partners' careers. Help partners continue to advance so they have the skills, network and energy to continue to drive firm success.

1 Training Forums

Over the course of the one-year program, participants will receive incremental training on key skills during one-hour webinars led by skilled Upstream presenters.

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

Training Forum Topics

- Leading Positive Change
- Conducting Effective Strategic Planning
- Developing Future Partners
- Building Partner Unity
- 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

To increase engagement in the monthly forums, participants are asked to commit to responding to key questions that tie to the topic during a live session.

After the Upstream presenter has provided training and instruction on the competency, assigned participants provide their thoughts/insights/experiences.

2 Action Plans

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

Accomplishing challenging goals allows participants to apply what they've learned and give value back to the firm. Participants complete all the goals chosen prior to the program year conclusion.



3 Virtual Networking Conference

Program participants have the option to attend a half-day virtual conference in November to continue their skill training in a more-interactive environment and help you build your network.



The Upstream facilitator will present information on building relationships.

During the second half we will tackle participant-submitted questions, allowing you to get advice on your thorniest issues and get insights on how top firms and your peers are successfully navigating these same issues.

Need more information?

Contact us at 406-495-1850 or info@upstreamacademy.com.

Key Elements of *Advanced Partner Academy*

4 Advanced Partner Conference and HeadWaters Leadership Conference



Networking with peers in a stimulating group environment is an important experience for all professionals.

Program participants are invited to attend the one-day Advanced Partner Conference on July 10, 2024 to conclude the one-year program.

Additionally program participants can attend the 1 1/2 day HeadWaters Conference on July 11-12. The HeadWaters Conference is the premier conference for firm leaders in top accounting firms in the US and Canada.

These highly-interactive conferences allows participants to network with peers, share thoughts and gain insights on both current and future firm issues so they can bring new energy, ideas and best practices back to the firm.

Participants work together to solve problems they'll face, working with different groups throughout the conference to encourage collaboration and innovative thinking.

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5 Unconditional Guarantee

We're confident that *Advanced Partner Academy* will be of immeasurable value to you. 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.

6 Experienced Consultants

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

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.

Sam Allred, Director at 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.



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

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