



Upstream Academy Network Benefits

Upstream Academy Network is designed for firms that are intentionally striving to improve. We offer three tiers of membership to provide options for services and programs for firms of all sizes.



Free Access to All Management Presentations

Firm leaders need innovative ideas and best practices for successfully handling challenges and opportunities that present themselves each year. UAN membership includes free access (for all members of your firm who wish to participate) to 10 [Management Presentations](#) offered each year, plus access to the recorded session for one year. These one-hour presentations are delivered via webinar and focus on the most relevant firm management topics. CPE is available for all Management Presentations for anyone who attends the live session or completes the self-study option. Non-members pay \$350 each.



Enrollment in Emerging Leaders Academy

Firms need to consistently cultivate high-yield, low-maintenance future leaders. This two-year program develops your next generation of partners using a combination of leadership development webinars, a virtual event, an in-person conference, individual goal setting, mentoring by an experienced partner, and completion of firm projects. Membership includes:

- Tier 1: one free participant in ELA, APA or NMA
- Tier 2: two free participants in ELA, APA and/or NMA
- Tier 3: three free participants in ELA APA and/or NMA

UAN members can enroll additional participants for \$3,300 per year.



Enrollment in Advanced Partner Academy

Firm partners need best practices and key principles for leading initiatives, making firm changes, and creating strategic plans so they can more effectively assume significant leadership roles. Provide partners best practices and key principles for leading initiatives, making firm changes, and creating strategic plans.

- Tier 1: one free participant in ELA, APA or NMA
- Tier 2: two free participants in ELA, APA and/or NMA
- Tier 3: three free participants in ELA, APA and/or NMA

UAN members can enroll additional participants for \$3,300.



Enrollment in New Manager Academy

Firms need a way to ensure new Managers find early success in managing people and engagements. This advanced one-year program helps firms engage, advance and retain their best. The program uses skill development webinars, a conference (either in-person or live-streamed), individual goal setting, and mentoring by an experienced partner, Membership includes:

- Tier 1: one free participant in ELA, APA or NMA
- Tier 2: two free participants in ELA, APA and/or NMA
- Tier 3: three free participants in ELA, APA and/or NMA

UAN members can enroll additional participants for \$3,300.



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Access to Career Development Series

Firms need training to increase skills, confidence and ability across all levels of the firm. Every year we present several series, each focused on a different firm level: below manager, manager or operational professional. Each series includes eight one-hour webinars, discussion questions and sample goals to help generate discussion and encourage participants to immediately implement lessons learned. Unlimited firm members can participate. Membership includes:

- Tier 1: one free series
- Tier 2: two free series
- Tier 3: three free series

UAN members can enroll in additional series for \$2,100 per series.



Access to Upstream Peer Network

Firm leaders should be able to develop a strong network with peers from similarly-sized firms. Our virtual peer-networking group connects individuals interested in career growth and includes groups for managers, senior managers, partners, COOs, firm administrators, and HR, marketing and L&D professionals. Quarterly facilitated meetings provide a forum for sharing best practices, solving challenges and discussing the most common issues participants face as leaders. Membership includes:

- Tier 1: one free participant
- Tier 2: two free participants
- Tier 3: three participants

UAN members can enroll additional participants for \$970 each.



Free Registration for a Firm Client to the Client Career Development Program

Firms need to serve as advisors to their clients, helping them with their most difficult issues. Firms can enroll one client organization at no charge and provide access to a library of quality, skill-building training sessions. These 30-90 minute, recorded presentations are available for on-demand group or self-study training to help your clients develop the next generation of leaders through instruction in key leadership traits and successful business practices. Twenty leadership and business skills training sessions are included. You can enroll additional client organizations for \$250 each.

Discount on Upstream Programs, Events and On-Demand Training

At 15% off (minimum), we guarantee you won't find our services and products priced lower than what you receive as a UAN member.

- **High Performance Firms** is a transformational two-year program that teaches best practices in key areas (culture, people, clients, growth) during four workshops.
- **HeadWaters** is two-day event featuring experts from top firms in the US and Canada and is widely regarded as one of the best accounting industry conferences available.