



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



July 11-12, 2024 Chicago, Illinois

HEADWATERS 2024

TRANSITIONS

TRANSITIONS ARE NECESSARY FOR YOUR FIRM'S CONTINUED SUCCESS

But transitions also provide opportunities
to change, improve and grow.

So how can you not just endure transitions
but come out of them stronger
and better able to handle what comes next?

Join us for HeadWaters 2024 as experts provide
practical examples and best practices to help your firm
use transitions to become healthier and more resilient.





The Conference

Transitions happen constantly. But you decide whether your firm simply weathers these changes—mitigating damages, forcing compliance and fitting the new into the old mold—or strategically plans for transitions that energize your firm.

During the HeadWaters Leadership Conference 2024, industry experts will provide guidance to help your firm understand and improve your process for making strategic transitions.

Here's a sampling of topics:

- Running your firm like a business
- Updating your partner comp system
- Improving your revenue model
- Ensuring your firm is living your values
- Addressing mental health in your firm
- Creating a transition culture
- Finding success without excess
- Understanding AI and other new tech
- Transitioning from a focus on service to relationship



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CONFERENCE SPEAKERS/FACILITATORS



Heath Alloway
Director at
Upstream Academy



Marty Brown
President and CEO
at PYA



Jackie Cardello
President and
Managing Partner
at GRF CPAs & Advisors



Jonathan Clark
Tax Partner
at RKL LLP



Jeremy Clopton
Managing Director at
Upstream Academy



Courtney DeRonde
CEO at Forge Financial
& Management
Consulting



Keith Dolabson
Partner at
Gursey Schneider LLP



Ifen Donovan
Licensed Clinical Mental
Health Counselor Associate at
Peace of Mind Counseling
Services



Michelle Golden River
President
at Fore LLC



John Sensiba
Managing Partner at
Sensiba, LLP



Danielle Supkis Cheek
VP, Head of Analytics & AI at
Caseware



Josh Tyree
President at
Harris CPAs

CONFERENCE AGENDA

Thursday, July 11, 2024

7:00 – 8:00 am Breakfast

8:00 – 8:15 am Welcome

8:15 – 9:15 am **Run Your Firm Like a Business, Not a Group of Sole Practitioners**

Jeremy Clopton, Director at Upstream Academy

What could the firm accomplish if everyone worked toward firm success, rather than just individual success? Could you practice more strategic decision-making, take on more ambitious initiatives, pass on expertise more easily, and create clients and employees loyal to the firm rather than individuals? Let's discuss specific, practical, and actionable ways to move from a collection of individuals to a unified team with a culture that encourages and rewards making good business decisions.

9:15 – 9:30 am Break

9:30 – 10:30 am **From Book to Behaviors: Changing Your Partner Compensation Model**

Jackie Cardello, Managing Partner at GRF CPAs & Advisors

You get what you reward. Asking partners to help the firm when those actions result in personal financial hits is not only difficult, but unfair. A secret recipe for fixing all partner compensation issues doesn't exist, but understanding and applying key principles can help you move toward your desired results. Let's discuss how to shift from rewarding personal revenue generation to rewarding impactful behaviors that cultivate a culture of teamwork, mentorship, client development, and ultimately more long-term success.

10:30 – 10:45 pm Break

10:45 – 12:00 pm **Changing the CPA-Firm Revenue Model: It's Not If, It's When**

Michelle Golden River, President at Fore LLC

Cost-plus pricing loses luster as firms begin sourcing talent abroad at much lower costs. And hourly billing's shortcomings are evident as technology speeds up work. As business models rapidly shift, firm revenue models need to as well. CPAs are taught that they "sell time" but time isn't your product! Your people regularly contribute to high-value outcomes but rarely had a good framework to position their true worth. Until now. Learn how worth-based pricing boosts profitability AND reinvigorates passion for our profession.

12:00 – 1:00 pm Lunch

1:00 – 1:45 pm Concurrent Sessions #1 (choose one of three)

Living Your Firm Values: Using Goals to Increase Employee Engagement

Josh Tyree, President at Harris CPAs

Are your firm values ingrained in the DNA of your firm – so everyone across the firm lives your values in goal-setting and decision-making every day – or would people have a hard time articulating how their work integrates with firm values? Join Josh as he explains a process designed to help individuals across all levels of the firm collaborate and contribute, develop meaningful goals, create new relationships, and lead initiatives, increasing engagement and breathing new life into your firm values.

Differentiating between Ownership and Leadership

Courtney DeRonde, CEO at Forge Financial & Management Consulting

Not all partners are leaders and not all leaders will become partners. Unfortunately, firms often put partners in charge of key initiatives, people, groups and processes, simply because they hold firm ownership. Using partnership rather than strengths, interests, or talents as the determiner too often leads to poorly-led initiatives, unhappy partners, and confused, disconnected, firm members. Let's discuss a mindset shift that allows you to recognize how and when to disconnect ownership from leadership.

Creating a Culture of Optimism, not Fear

Heath Alloway, Director at Upstream Academy

Remaining positive during stressful, busy and changing times can be difficult. When you're out of your comfort zone or low on time, pessimism can creep in. But attitude matters. And your outlook can affect not only your mental health, productivity and effectiveness but that of everyone around you – family, friends, team members and clients. Join us for a frank (non-Pollyannaish) discussion of how to achieve and maintain a proactively positive culture, fueling a belief that the best is yet to come.

1:45 – 2:00 pm Break



CONFERENCE AGENDA

Thursday, July 11, 2024 (continued)

2:00 – 2:45 pm Concurrent Sessions #2 (choose one of three)

From Zero to Hero: Relationship Building for Introverts

Keith Dolabson, Partner at Gurseyn Schneider LLP

When people think of networking, often they picture a room full of strangers they're supposed to meet and impress in a set time limit, making useful contacts for career and firm growth. So, introverts are out of luck, right? Let's take a new approach to relationship-building – one based on proactively building win-win connections more than witty conversations. Keith will talk about how to approach interactions as interested, rather than interesting, to form strong, mutually-beneficial relationships that both individuals enjoy.

Where Did My Client Go? Strategies to Create a Client Transition Culture

Jonathan Clark, Tax Partner at RKL LLP

Done right, client transitions strengthen the client's relationship with the firm, while developing younger staff. So, what can you do to ensure transitions across the firm are smooth, effective, timely and expected? Join Jonathan as he discusses how to create a client transition culture – where everyone from the newest manager to the most experienced partner is encouraged to develop others and to create a plan to continue their own career growth by transitioning work and clients.

Stop Ignoring It and Start Addressing It: Mental Health in the Workplace

Ifen Donovan, Licensed Clinical Mental Health Counselor Associate at Peace of Mind Counseling Services

Our industry (along with many other fields) is experiencing a mental health crisis. The time for politely looking away as firm members struggle has passed. Join Ifen for a candid discussion of how to recognize the signs you or a team member may be struggling, how to analyze firm cultural norms that may be affecting your firm's collective mental health, and how to proactively work to create a firm and team that values and positively impacts your team members' well-being.

2:45 – 3:00 pm Break

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

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.

5:15 – 6:15 pm Reception

Friday, July 12, 2024

8:00–8:10 am Welcome

8:10– 9:25 am Success without Excess

John Sensiba, Managing Partner at Sensiba LLP

More is better, right? Working for more clients, more money, more reach can be seen as your obligation as a firm member. But is it success if you and your firm members don't find joy or fulfillment in work? When does success turn into excess? Join John as he discusses how to take a different look at success – one that explores valuing and finding purpose in your firm's impact on you, your clients, your firm members, and your community.

9:25 – 9:40 am Break

9:40 – 10:40 am How AI & Tech Are Changing the Industry

Danielle Supkis Cheek, VP, Head of Analytics & AI at Caseware

The AI invasion has already happened. Almost every tech development company has integrated AI into their offering (or has this in development). So, what does that mean for firms? How will these changes impact standards? How do you know how quickly to jump into new tech? And, what should you be doing to prepare? Let's discuss the impact new technology is having and will have on the profession, including opportunities, challenges, and the transformative potential (and risks) AI brings.

10:40 – 10:55 am Break

10:55 – 12:15 pm Changing Focus from Service-Provider to Relationship-BUILDER

Marty Brown, President and CEO at PYA

Reactive, compliance-related, "give me a call if I can help" client service won't ensure long-term success. So, how can you foster relationships that encourage clients to think of you when they need advice, need assistance with their business, or know someone who wants a firm recommendation? Join Marty to discuss how his firm shifted focus from a service mindset to client relationship-building, and ways to make your client relationships deeper, more profitable, and more enjoyable (for you and the client).

12:15 – 12:30 pm Closing

THE LOCATION

Chicago

Chicago's magic lies in its mix: sophisticated yet friendly, bustling city streets adjacent to long stretches of green parks and sparkling blue Lake Michigan, and a stunning year-round array of things to see and do, unique in all the world.

With an endless assortment of theatre, music, dance, restaurants, shopping and nightlife at your fingertips and able to match every taste, budget and mood, come and discover why so many visitors fall in love with this city every year.

Hotel Information

This year's conferences will be held at the Fairmont Chicago – Millennium Park located at 200 N. Columbus Dr. Chicago, IL 60601. Reservations can be made online or by calling 800-441-1414. Specify *Upstream Academy* to receive the conference rate of \$259.00. We recommend making reservations by June 18, 2024. If you have any problems with hotel reservations, please don't hesitate to contact us for assistance.

Conference Meal Information

The conference will run from 8am to 5pm on Thursday, and from 8am to 12:30pm on Friday. Upstream will provide a continental breakfast starting at 7am each day, breaks on each day, and lunch on Thursday. You and your adult guest are welcome to join us for a networking reception at 5:15pm on Thursday. Participants are on their own for dinner.



If you have special meal requests, please contact Kelsey Mundt at (406) 495-1850 or email at kelseym@upstreamacademy.com.

Air Travel Information

The hotel is located approximately 35 minutes from O'Hare International Airport and 26 minutes from Midway International Airport.

Cost and Registration

Registration is \$1,350 per person (\$1,150 for [UAN](#) members) Go to www.upstreamacademy.com/headwaters/ to register or call 406-495-1850.

Cancellation Policy

Registrants will be refunded registration fees less a \$100 cancellation charge, if they notify Upstream before June 13, 2024. After this date, only \$200 will be refunded.

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 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.

