

THE PARTNER INSTITUTE™

THE ACCOUNTING PROFESSION'S PREMIER PARTNER DEVELOPMENT PROGRAM



LEADERSHIP

Charting Your Path to Greatness

When you talk with any of the top consultants or leading practitioners in the profession, they confirm that developing an effective successor generation is the number one issue facing accounting firms today.

Why? The IPA Practice Management Survey shows that 71% of firms have an average equity partner age above 50, and 76% of firms have no formal succession plan. These staggering statistics have many firms scrambling to find the next generation leaders in their firms—leaders who will excel in the areas of practice development, performance management and strategic thinking.

"The content of The Partner Institute™ was outstanding and directly relevant to my role as a new shareholder at my firm."

— Paul Languirand, CPA

how to develop leaders or serve as an effective mentor and coach)—it's a deliberate process, precisely crafted with an intentional focus.

The Solution

Sending your future leaders to limited "quick-fix" programs or conferences isn't a long term prescription for success. In his Harvard Business Review blog, Ron Ashkenas, managing partner of Robert H. Schaffer & Associates, demonstrates that translating leadership training into results requires a special blend of training, mentoring and perpetual practice.

Often copied but never duplicated, The Partner Institute™ (TPI) is proud to stand on its proven record of helping accountants address this challenge head-on. Our comprehensive, three-year experience provides participants with world-class training, and a continuous learning environment, coupled with a culture of accountability that is unmatched.

Since 2004, TPI has served as the accounting profession's premier partner development program—providing world-

Sophisticated firms realize that leadership development isn't something they can simply delegate to "one of the partners" (someone who may have little-to-no formal training or education on

class content, processes and tools designed specifically for the CPA. Our program adheres to an empowered learning model that meets the unique needs of the adult learner and ensures real-world application of the knowledge within the participant's firm.

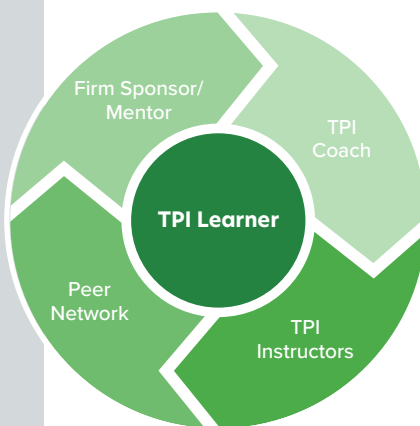
Additionally, our curriculum has been specifically designed to develop the personal, interpersonal, managerial and organizational capabilities of its participants across five key areas:

1. Leadership
2. Productivity
3. Communication
4. Practice development
5. Practice management

Whether you are a partner or a partner-to-be, our three-year, multi-disciplinary experience will help you develop the skills and attributes needed to successfully assume a leadership role at your firm.

[View a library of testimonials from recent TPI graduates.](#)

www.thepartnerinstitute.com/testimonials



TPI Leadership Development Model

As our development model illustrates, each TPI participant is immersed in a cohesive development regimen that balances feedback and interaction among their instructors, coach, firm sponsor and classmate peers.



The Growth Partnership 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.

Session 1	Webinar 1	Session 2	Webinar 2
Timeframe: January Location: Orlando, FL Length: 2.5 Days Content: The 7 Habits of Highly Effective People, Experiential Learning Opportunity Recommended CPE (hrs.): (20) <i>Personal Development</i>	Timeframe: May Length: 1-2 Hours Content: Time Management for Microsoft® Outlook®: Powered by The 5 Choices to Extraordinary Productivity Recommended CPE (hrs.): (2) <i>Personal Development</i>	Timeframe: June Location: San Diego, CA Length: 2.5 Days Content: Success Lab + Project Management Essentials; Business Writing Skills; Present Like a Pro!; Experiential Learning Opportunity Recommended CPE (hrs.): (14) <i>Communications & Marketing</i> (5) <i>Management Services</i> (1) <i>Personal Development</i>	Timeframe: August/September Length: 1-2 Hours Content: Emotional Intelligence Recommended CPE (hrs.): (2) <i>Personal Development</i>

Session 3	Webinar 3	Session 4	Webinar 4
Timeframe: October Location: Dallas, TX Length: 2.5 Days Content: Success Lab + Overcoming Unconscious Bias; DISC: Behavior Profile; Accountability; Disciplined Marketing; Experiential Learning Opportunity Recommended CPE (hrs.): (4) <i>Behavioral Ethics</i> (8) <i>Communication & Marketing</i> (8) <i>Personal Development</i>	Timeframe: January Length: 1-2 Hours Content: Survey Analytics: Diving into IPA's Operational Survey Data Recommended CPE (hrs.): (2) <i>Business Management & Organization</i>	Timeframe: April/May Location: Washington, DC Length: 2.5 Days Content: Success Lab + The 4 Essential Roles of Leadership; Best Practices Forum #1; Experiential Learning Opportunity Recommended CPE (hrs.): (15) <i>Business Management & Organization</i> (5) <i>Personal Development</i>	Timeframe: August/September Length: 1-2 Hours Content: Leading Generations Recommended CPE (hrs.): (2) <i>Personal Development</i>

Session 5	Webinar 5	Session 6	Webinar 6
Timeframe: November Location: Las Vegas, NV Length: 2.5 Days Content: Success Lab + The 5 Dysfunctions of a Team; Leading at the Speed of Trust; SPIN Selling & the PIF Process; Best Practices Forum #2; Experiential Learning Opportunity Recommended CPE (hrs.): (9) <i>Personal Development</i> (6) <i>Business Management & Organization</i> (4) <i>Communications & Marketing</i> (1) <i>Personnel/HR</i>	Timeframe: January Length: 1-2 Hours Content: Strategy: Mission, Vision, Values Recommended CPE (hrs.): (2) <i>Business Management & Organization</i>	Timeframe: May Location: Nashville, TN Length: 2.5 Days Content: Success Lab + Talent Management; Multipliers; Best Practices Forum #3; Experiential Learning Opportunity Recommended CPE (hrs.): (13) <i>Personal Development</i> (7) <i>Personnel/HR</i>	Timeframe: August/September Length: 1-2 Hours Content: TPI in Review Recommended CPE (hrs.): (2) <i>Personal Development</i>

Session 7	Session 8 - Reunion*	TPI at a Glance
Timeframe: October/November Location: Orlando, FL Length: 2.5 Days Content: Final Success Lab + Firm Metrics; What's Next After TPI; Change Management; Experiential Learning Opportunity; Graduation Recommended CPE (hrs.): (4) <i>Business Management & Organization</i> (16) <i>Personal Development</i>	Timeframe: October Location: TBD Length: 1.5-2 Days Content: TBD <i>*Optional Session at Additional Cost</i>	Tuition In Advance\$19,500.00 3 Annual Installments\$7,200.00 CPE150 Accredited Hours Class SizeMaximum 32 Try Before You Buy! You may reserve your spot in The Partner Institute by submitting a deposit of \$750 with your registration. Attend the initial course and then decide if the program is right for you. If you elect to continue, we will invoice you accordingly.