



THE TRUSTED ADVISOR PROGRAM

Moving your firm from
'compliance' to 'advisory'

The BIG IDEA

Provide leading CPA firms with the program, tools, and accountability needed to move beyond the historical "debts and credits" framework, and truly begin engaging their clients as Trusted Advisors.

Many CPAs acknowledge the need to shift into a more proactive advisory-focused posture when serving their clients, but most lack the systems to effectively make that transition happen within their firms. Breaking free from the traditional compliance / annuity services mindset requires a new way of thinking, and an entirely new approach.

Over the past 20+ years The Growth Partnership has been helping CPA firms achieve sustainable, profitable growth, and we've learned and seen a lot over those two decades of service. Drawing on that experience and expertise, we have developed the Trusted Advisor Program (TAP) to help firms more easily shift to an advisory-oriented posture. TAP is more than just CPE – it is a practical approach to changing the culture of your firm that includes everything you need to transition successfully.

- NASBA certified training (classroom and/or virtual) to help participants develop advisory-oriented competencies;
- A customized framework of assignments for each participant that will move them toward a more advisory-centric approach;
- One-on-one coaching to help each participant overcome barriers and successfully achieve their program assignments;
- Team pipeline meetings to measure success and track program results;
- A proven network of advisory partners that can supplement a firm's in-house advisory expertise;
- An online Advisory Platform that serves as the central hub for program information and activity.
- Complete program customization to seamlessly tie the TAP into your existing programs and initiatives.
- Objective metrics displayed on compelling dashboards to quantify program results.

Duration:	18-24 months
CPE:	64-96 hours/participant
Coaching:	6-10 sessions/participant
Pipeline:	Quarterly team meetings
Delivery Method:	Live and/or virtual
Tech Stack:	ABLE

*Minimum and maximum ranges provided.
Each program customized for individual clients.*



"Bottom line - the TAP has made a significant difference in how our firm approaches client relationships. We have established a more disciplined 'advisory' approach and are receiving positive feedback (and increased billings) as a result."

Roger Gingerich, CPA ABV CVA CCA
Partner
Marcum, LLP



THE GROWTH PARTNERSHIP
— PLAN ON SUCCESS —