



# THE PARTNER INSTITUTE

Developing the Next-Generation of Accounting Firm Leaders

## The BIG IDEA ▶

Provide managers and young partners with world-class training and coaching to prepare them for leadership roles in their firms. Our curriculum focuses on three unique areas: business development and growth, leadership and talent development, firm/practice management.

After becoming technically proficient at their jobs, senior managers and new partners in CPA firms are ready to balance their technical skill set with the non-technical skills needed to help lead and manage their accounting firms. For over 15 years The Partner Institute has been providing the training and coaching needed to prepare participants to do just that.

Many TPI graduates have gone on to assume the Managing Partner role at their firms, and almost all have assumed leadership responsibilities for either a niche area or service line. Recognizing that leadership development is a “process” as opposed to a one-time “event”, our 3-year curriculum offers compelling breadth and depth.

- 17.5 days of classroom training divided into seven 2.5 day sessions – all held at premiere U.S. destinations;
- 12 one-on-one coaching session with two different executive coaches (6 sessions each) who each focus in different areas: one on leadership and people issues, and the other on growth and business development;
- Web-based learning sessions designed to “bridge the gap” between the in-person classroom sessions;
- World-class curriculum designed specifically for CPAs in public practice, facilitated by content experts with real-world accounting firm experience;
- Unique experiences outside of the classroom in conjunction with the Disney Institute™, Zappos™, and The Improv Shop™;
- Development of an unparalleled network of peers, and access to a robust Best Practices Forum;
- Regular checkpoints with each participant’s firm sponsor – usually a senior member of the participant’s firm;
- Real-world “OLO” (outside learning opportunity) assignments designed to bring the learning out of the classroom and back into the participant’s firm;
- Access to leading industry tools and resources like The Rosenberg Survey, ABLE, and Advisory Alliance.

<b>Tuition:</b>	3 annual payments of \$6,000 or 1 up-front payment of \$16,000
<b>CPE:</b>	145 hours – NASBA accredited
<b>New Firms:</b>	<b>“Try Before You Buy” Incentive:</b> Attend Session 1 for \$500 before making a final decision to enroll.
<b>Timing:</b>	Classes start each year in January.



*“TPI was one of the most meaningful programs in my professional career. I started as a manager in my firm and graduated as a partner. The leadership, marketing, organization, and speaking skills I learned were instrumental to my development and instilled the confidence that I could succeed. I am now the Managing Principal of our firm and require all new or potential partners to attend TPI.”*

**Jessica Sayles, CPA**  
Managing Principal  
HRC



**THE GROWTH PARTNERSHIP**  
— PLAN ON SUCCESS —