



# THE TRUSTED ADVISOR PROGRAM

*Moving your firm from 'compliance' to 'advisory'*

## The BIG IDEA

Expert marketing strategists take a look at your current marketing initiatives to help you determine how you can be most effective with your marketing activities and investment.

|                         |                           |
|-------------------------|---------------------------|
| <b>Duration:</b>        | 18-24 months              |
| <b>CPE:</b>             | 64-96 hours/participant   |
| <b>Coaching:</b>        | 6-10 sessions/participant |
| <b>Pipeline:</b>        | Quarterly team meetings   |
| <b>Delivery Method:</b> | Live and/or virtual       |
| <b>Tech Stack:</b>      | 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**  
Partner  
Marcum, LLP

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.