Practice Forward

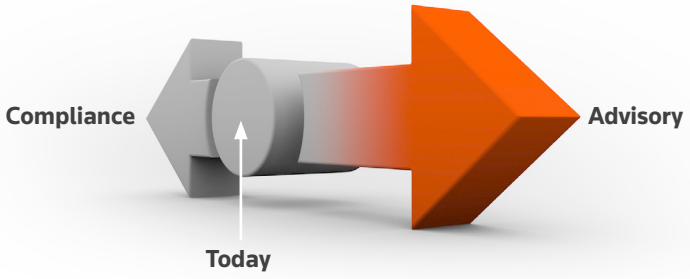
Increase revenue and build better client relationships

Thomson Reuters® Practice Forward provides firms with tools and customized coaching that help you achieve advisory-focused client relationships and a healthier bottom line.

Practice Forward begins with the belief that our profession's success from today forward rests with a more pronounced advisory role. You may already be providing advisory services, *but likely not billing* your client appropriately for *your expertise*.

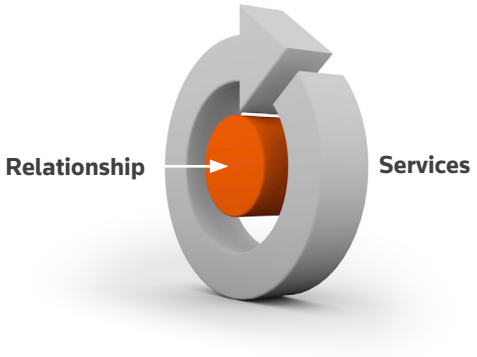
Advisory is about the future

Compliance work is all based on what has already happened, but advisory is about the future — what can we do now to get a different (desired) result or outcome.



More meaningful client relationships

By applying a more sustainable value-based business model with Practice Forward, you will increase revenue while building better client relationships.



Following a market-proven roadmap, Practice Forward navigates firms down the path of developing and implementing an advisory services approach to engaging clients, rooted in a fundamental distinction between traditional compliance services and value-add advisory work. Through practitioner-designed content and tools, our Practice Forward consultants ensure firms achieve the benefits Practice Forward offers — more meaningful client relationships, more engaging work for staff, and a healthier firm bottom-line.

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Practice Forward customers speak:

"I always had this vision or direction or hope.... of having a firm where we get paid for our expertise, and we're not just in cubicles crunching numbers on spreadsheets, but we're actually coaching and helping clients.... Practice Forward has allowed us to do that. Practice Forward has allowed us to make that change."

Rick Sager
Sager & Associates, CPAs

"I would highly recommend Practice Forward to any firm that is looking to develop a tighter bond with their clients and really work as a business adviser. The clients that we've brought on as a result of implementing Practice Forward have become more engaged and they work with us very regularly."

Mark Martukovich
FMA, CPA

"... I started Practice Forward at SYNERGY ... we didn't start the coaching until after the April tax deadline ... at the end of the day, it resulted in $30,000 of revenue in the first 30 days that we implemented Practice Forward."

Chris Papin
Papin CPA, PLLC

Guided consulting to support a successful implementation

Advisory and maintenance service proposal templates to set clear expectations about the client relationship

Pricing calculators to set firm-wide minimum service prices and individual client engagement prices

Presentations and process guides for effective sales meetings with prospects and existing clients

Client deliverables and calculating worksheets to standardize advisory delivery and transfer knowledge to clients

Practice Forward Membership Benefits

- **Practice Forward Webinars: CPE qualified thought leadership webinars hosted by Practice Forward graduates, Practice Forward consultants, and other industry experts. These webinars cover advisory centric topics and top-of-mind industry developments.**
- **Advisory Office Hours: Open invitation to join virtual meetings hosted by a Practice Forward Consultant. You will have an opportunity to ask questions, share stories and ideas, and hear from other firms navigating their advisory journey.**
- **Practice Forward Connect: Join other Practice Forward members for an in-person event at SYNERGY presented by your Practice Forward consultants collaborating with forward-thinking advisors.**
- **Practice Forward Group: Easily collaborate with other Practice Forward members, listen to recorded webinars and Pulse of the Practice podcasts, and share content in the exclusive Practice Forward Group.**
- **Advisory Roundtables: Connect and share with peers about best practices, challenges, and hot topics during this virtual peer-to-peer event.**
- **Practice Forward Learning Plan: Access eLearning, videos, and guidance to help you navigate your Practice Forward Implementation Journey with maximum success.**

New for 2023!

Practice Forward Graduate Master Learning Series: Join us for the Practice Forward Graduate Master Learning Series, a 6-session program presented by our Advisory Partners. This series is designed to advance your firm's advisory journey. Attending the sessions live will qualify you for CPE credit and recordings will be made available. Don't miss this opportunity to enhance your skills and knowledge in the field of advisory services.

Practice Forward Graduate Advisory Office Hours: Join Practice Forward Graduate Advisory Partners as they host virtual office hours to provide a trusted advisor resource for you to get answers to your questions.

Ready to get real results that improve your firm's bottom line?

By applying a more sustainable value-based business model with Practice Forward, you will increase revenue while building better client relationships.

If your firm is forward-thinking with a focus on serving business clients, you're ready for Practice Forward. For more information about Practice Forward, call us at **800-968-8900**

tax.tr.com/practice-forward

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