



Practice Forward

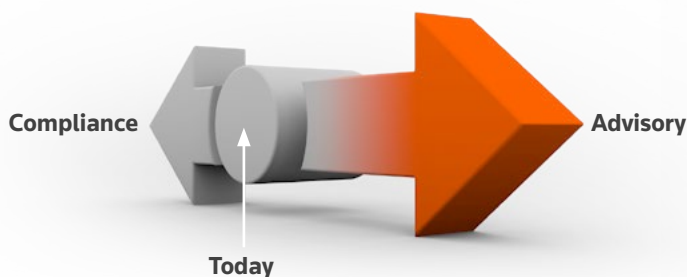
Increase revenue and build better client relationships

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.*

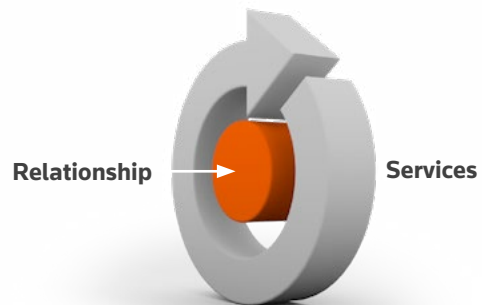
Advisory is about the future

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.

Practice Forward customers speak:

"Practice Forward has made my work life easier because now I'm more focused on sales and marketing rather than just grinding out tax returns. Part of the Practice Forward metamorphosis for me has been that it caused me to hire the staff I need. I used it as a catalyst to go forward, and it's helped. This time last year I was buried. Early tax season this year was horrible until I got started with more Practice Forward strategies and also got some additional staff on board."

Dale Jacobson

Kenneth Dale Jacobson, CPA, PLLC

"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

CPA



Exclusive Practice Forward content that is updated as advisory changes arise



Financial calculators to provide in-the-moment decision support



Guided consulting to support a successful implementation



Customizable client handouts to include the firm's branding and contact information



Integration with related research and know-how tools

Ongoing collaboration and guidance

- ➔ **Webinars:** Stay informed of current events with webinars by Practice Forward consultants and more
- ➔ **Open Forum:** Address your questions and hear what your peers have to say through virtual meetings twice a month
- ➔ **Practice Forward Connect:** Expand and enhance your advisory model at this exclusive two-day virtual event
- ➔ **Practice Forward Group:** Collaborate with other members and access exclusive content
- ➔ **Pass the Mic – Motivate, Innovate, and Collaborate with your Peers:** Share your expertise and learn from others. Join the in-person event at SYNERGY and attend virtual events throughout the year

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 **+1 800 968 8900**

tax.tr.com/practice-forward