

# Coach Patton Practice Improvement Programs Enrollment Form



## Enter Your Information Here:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
 Contact Person (if other than yourself): \_\_\_\_\_ Practice Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

### Payment Information:

For your convenience we accept:

VISA, MasterCard, American Express or Discover:        

Credit Card #: \_\_\_\_\_ Exp Date: \_\_\_\_\_

Cardholder's Signature: \_\_\_\_\_

I prefer to pay with a check. Please send me an email when you receive it.

### Contact Us:

EMAIL:  
**tpatton@coachpatton.com**  
 www.CoachPatton.com

CALL: **317-581-1776** FAX: **317-581-1812**

**Patton and Associates, LLC.**  
 9000 Keystone Crossing  
 Suite 630  
 Indianapolis, IN 46240

### 2010 Coach Patton Seminar Schedule (check one)

**How To Acquire Your First or Next Accounting or CPA Practice**

- Wed., May 12, 2010
- Wed., July 7, 2010
- Wed., Aug. 11, 2010
- Wed., Sept. 8, 2010
- Wed., Oct. 13, 2010
- Wed., Nov 17, 2010

**How to Acquire, Grow & Effectively Run Your Accounting/CPA Practice PLUS Selling Financial Services for CPAs: Hands-On 4-DAY Prep Class for Series 65 to Become an RIA - \$1,990**

- Tues. - Fri., Aug 24-27, 2010**  
 Tue. 6/8 - 1pm-5pm | Wed. 6/9 all day  
 Thr. 6/10 all day | Fri. 6/11 8am-12 noon  
 Troy Patton CPA, Brian Couzens and Steve Demas are your instructors for the Series 65 exam to prepare you to take it at a ProMetrics location near you the following week.

**Intro to Finding New Clients Free Conference Call - Tuesday, Aug 3, 2010 (actual monthly coaching program starts August 2010 - Application Only)**

**Finding New Clients, Inner Circle Coaching Program - \$25,000 Minimum Guaranteed or Your Money Back - \$400.00 x 12 months**

Each month I teach you how to find new clients to grow your practice, how to add additional services to your current offerings, how to market your self to affluent niche clients that will pay your fees, insider strategies PLUS how to acquire another practice.

**How To Acquire Your First or Next CPA / Accounting Practice Tele-Seminar • \$495<sup>00</sup>**

A 3-hour intensive tele-seminar on learning of how to acquire a practice. Especially useful if you're working for a big firm & looking to make your 1st purchase OR you have your own practice & want to add to it by acquisition.

**1-on-1 Acquisition Coaching - \$5,200<sup>00</sup>**

One-on-one coaching of the practice you're looking to acquire where I work with you via phone on all questions you have, assist you with the contracts, negotiations, budgets, etc. Credit for above/past seminars.

**Private On-Site Consulting - \$18,000<sup>00</sup>**

One-on-one private consulting for two days where I am on-site at your location to assist with due diligence and contracts of a practice including live Seminar above and Acquisition Coaching.

**Current Practice Business Development for Accountants & CPAs • \$995<sup>00</sup>**

How to acquire another or your first practice, how to run your practice effectively, strategies & systems for growing your practice such as Internet marketing, adding business valuations, dental practice targeting, marketing your investment management business to existing and new clients. **Tue. 8/24 1-5pm, Wed. 8/25 8-noon**

**Series 65 Training 16-Hour Class For Selling Financial Services for CPAs • \$995<sup>00</sup>**

In this 16-HOUR intensive Online Training Class I cover the information you'll need to take the Series 65 Registered Investment Advisor exam plus it includes 4 hours of marketing & how to build the business. We provide training materials and pay for FINRA, SEC registration & license. When you register you'll be sent your U4 to complete and return PRIOR to taking this Training Class.  
**Wed. 8/25 1-5pm, Thr. 8/26 all day, Fri. 8/27 - 8a-12noon**

Accepted by: \_\_\_\_\_

Today's Date: \_\_\_\_\_

Signature: \_\_\_\_\_