

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

Selling Financial Services for CPAs Hands On 4-Day Prep Class for Series 65 to Become an RIA

- Tues. - Fri., June 8-11, 2010
 9:00 am ET to 5 pm ET
 Virtual Class - Webinar Based

Troy Patton, CPA 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, June 22, 2010
 (actual monthly coaching program starts July 2010 - Application Only)

Finding New Clients, Inner Circle Coaching Program - \$25,000 Minimum Guaranteed or

Your Money Back - \$400⁰⁰ per month 2010-2011

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.

How to Acquire, Grow & Effectively Run Your Accounting / CPA Practice - \$1,495⁰⁰

Tele-seminar is 3 half days of intensive training, hands-on learning of how to acquire a practice, strategies for growing billings and client value, and efficiently running it for maximum profit. Credit given for above seminar.

1-on-1 Acquisition Coaching - \$5,200⁰⁰

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 - \$18,000⁰⁰

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.

How To Acquire Your First or Next CPA / Accounting Practice Tele-Seminar • \$495

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..

Series 65 Training 4-Day Class For Selling Financial Services for CPAs • \$995

In this 4-DAY intensive Online Training Class I cover the information you'll need to take the Series 65 Registered Investment Advisor exam. 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.

Accepted by: _____
 Please Print

Today's Date: _____

Signature: _____