

# 2011-12 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

### 2011-2012 Coach Patton Seminar Schedule (check one)

#### How To Acquire Your First or Next Accounting or CPA Practice (Webinar)

- Thr., Nov 17, 2011
- Wed., Dec 7, 2011
- Thr., Apr 26, 2012
- Wed., May 23, 2012
- Wed., Jun 27, 2012
- Wed., Aug 1, 2012
- Thr., Sep 6, 2012
- Wed., Oct 24, 2012
- Wed., Nov 14, 2012

#### Business Development Workshop Hands-On 1-DAY 9a-4p Local Time led by Troy C. Patton CPA/ABV "The \$6 Million Dollar Man"

- Tue. May 8, 2012 - Orlando, FL
- Tue. June 5, 2012 - Houston, TX
- Tue. July 24, 2012 - Chicago, IL
- Wed. Aug. 8, 2012 - Philadelphia, PA
- Tue Sep. 25, 2012 - Las Vegas, NV
- Wed. Oct. 26, 2012 - Atlanta, GA
- Thr-Fri, Nov 8-9, 2012 - Indianapolis, IN

Intro to Finding New Clients Free Conference Call (prerequisite to Private Monthly Coaching Program - 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. \* INNER CIRCLE ANNUAL PROGRAM in Indianapolis in 2012: Thr. Nov, 8 (1p-5p) & Fri. Nov 9 (8a-12noon)

#### 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.

#### 1-Day Business Development Workshop for Accountants & CPAs • \$715<sup>00</sup>

How to acquire another or your first practice PLUS how to run your practice effectively, strategies & systems for growing your practice such as marketing, adding business valuations, dental practice targeting, marketing your investment management business to existing and new clients and more. (See above for schedule or go online)

#### Asset Management 12-Hour Class For Selling Financial Services for CPAs • \$350<sup>00</sup>

In this 12-HOUR intensive 2-Day Online Training Class we 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.

Call 317-581-1776 for dates & times of next class

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

Please Print

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

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