

# How To Acquire, Grow & Effectively Run Your Accounting/CPA Practice

**June 17, 18, 19, 2008 - LIVE National Tele-Seminar  
presented by Troy C. Patton, CPA**



Troy C. Patton, CPA  
www.CoachPatton.com

Join me for an educational training for those who are looking to acquire a practice or just want to run a practice more profitable or efficient. At my live tele-seminar on the mornings of June 17, 18 & 19, 2008 I will teach you what pitfalls to avoid, where to look for them, learn how to do due diligence, all this from my experience **buying 12 firms**. (Although the tele-seminar is live **it will be recorded for playback** for attendees if you are late to or miss a session.)

I will share real case studies of practices that failed, or failed in one aspect and how it impacted the results of the acquisitions. I will share success stories and failed stories. I will also spend a whole day showing you the aspects of a Practice that is run efficiently and how to manage a practice in an efficient and profitable manner **after the acquisition**.

## TELE-SEMINAR AGENDA:

**TUE. June 17, 2008 - 9am ET to 12 noon ET**

### The Pitfalls To Look For When **BUYING** An Accounting / CPA Practice

- 1) What is a Practice Worth
- 2) State of the Market
- 3) Case Studies
- 4) Pitfalls
- 5) Contracts
- 6) Financing Terms

**WED. June 18, 2008 - 9am ET to 12 noon ET**

### How To **GROW** Your Practice

- 1) Growing your Firm
- 2) Replacing lost Clients
- 3) Billing Procedures
- 4) Outsourcing Practices
- 5) Investments & Financial Services
- 6) Marketing

**THR. June 19, 2008 - 9am ET to 12 noon ET**

### How To **RUN** an Efficient Practice

- 1) Review and Assessment of Practice
- 2) Processing Workflow
- 3) Utilization/Realization
- 4) Benchmarks/Fees
- 5) Service Outsourcing
- 6) Checklists and Tools for Success

How To Acquire, Grow & Effectively Run Your Accounting / CPA Practice

**DAY 1 - Tuesday, June 17, 2008**  
9:00 am ET - 12 noon

◆ **What Is A Firm Worth And The Pitfalls To Look For When Buying?**

**DAY 2 - Wednesday, June 18, 2008**  
9:00 am ET - 12 noon

◆ **How To RUN an Efficient Practice.**

**DAY 3 - Thursday, June 19, 2008**  
9:00 am ET - 12 noon

◆ **How To GROW a Practice.**

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After you register you'll receive your tele-seminar 3 ring binder workbook in the mail.

You'll need this to participate, follow along and take notes during the live tele-seminar.

If you have questions about the tele-seminar call 317-581-1776.

# Coach Patton Practice Acquisition Program Enrollment Form ♦ 1-317-581-1300

## 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	Call	Fax
<p><a href="mailto:tpatton@coachpatton.com">tpatton@coachpatton.com</a></p> <p><a href="http://www.CoachPatton.com">www.CoachPatton.com</a></p>	<p><b>1-317-581-1776</b></p>	<p>FAX Application to:</p> <p><b>1-317-581-1812</b></p>

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**How To Acquire, Grow & Effectively Run Your Accounting / CPA Practice LIVE Tele-Seminar June 17, 18, 19 2008 - \$1,895<sup>00</sup>**

Seminar is a day and half of intensive classroom hands-on learning of how to acquire a practice, with sample contracts, forms, practice management tools, processing tips, etc. See website for details.

**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. *including* Seminar above.

**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.

Accepted by: \_\_\_\_\_  
 Please Print

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

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

**Patton & Associates, LLC.**  
*"Many Record History, Few Create Wealth"*