

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

**One-Day Seminar - July 17, 2008 - Irvine Marriott - Irvine, California**  
**9am - 5pm PT - 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 seminar all day in **IRVINE, CA on July 17, 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.

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 significant time 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.

## LIVE SEMINAR AGENDA:

**THURSDAY July 17, 2008 - 9am - 5pm PT**

### 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

### 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

### 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



## CALIFORNIA SEMINAR LOCATION:



Irvine Marriott  
18000 Von Karman Ave  
Irvine, CA 92612  
Phone: 1-949-553-0100  
Fax: 1-949-261-7059  
www.marriott.com

**WARNING:** Travel and room accommodations are NOT included in the seminar tuition. You must book your own flights & hotel.

**At the seminar you'll receive your seminar 3 ring binder workbook. You'll need this to participate, follow along and take notes during the live seminar. If you have questions about the 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: <b>1-317-581-1812</b></p>

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**How To Acquire, Grow & Effectively Run Your Accounting / CPA Practice Seminar in IRVINE, CA - June 17, 2008 - \$1,895<sup>00</sup>**

Seminar is a day 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"*