

# CPA Firm

## Regional Leadership Network



Are you looking for insights on some of your most challenging issues or simply seeking to develop more meaningful connections with other firm leaders? The new CPA Firm Regional Leadership Network is your solution. This multi-state virtual network provides facilitated discussions for similar-sized public accounting firm leaders providing a forum for you to explore trends impacting your firm and to learn from the experiences of colleagues.

### Who it's for:

- Firms that have between 2-20 accounting and finance professionals.
- Enrollment in the program is limited to one participant, ideally at a leadership level, per firm and the subscription belongs to the firm.

### Benefits:

- Provides a confidential and open forum for leaders across the Midwest to discuss what's working and what isn't.
- Topics will be driven by cohort participants and determined at the kickoff meeting for the balance of the subscription year.

Examples include:

- What's keeping you up at night?
  - Leadership, firm management, operational challenges
  - Client management
  - Technology
  - Private equity and succession planning
  - Other trends and emerging hot topics
- Serves as an avenue for firms to learn from one another and develop long-term relationships.

### How it works:

- Participants will be assigned to a virtual cohort which includes up to 15 individuals from firms across all participating states (IA, IL, IN, MN, MO, NE, ND, SD, WI, WY).
- Participants will remain in the same cohort throughout the year and in subsequent years with the goal of establishing long-term valued relationships.
- Quarterly meetings will be facilitated by a CPA State Society representative and will last 120 minutes long, with one hour dedicated to content and one hour to open forum discussion.
- Discussion shared during cohort meetings will be considered confidential to encourage open dialogue and will not be recorded.
- The subscription year begins with an initial meet and greet launch meeting in February 2025 followed by quarterly meetings for the balance of the subscription year as determined by the group.

### Fee:

- The fee is \$1,000 per firm per year and is non-refundable.
- The fee allows for one representative per firm.

### More Information:

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