



Trusted Client Adviser Workshop

**Move Beyond the Numbers.
Maximize Opportunities.**

CPAs perform numerous roles when servicing clients' varied needs. Serving in the expert capacity for accounting, audit and tax-related services is where CPAs have made their mark. While this technical role is foundational and necessary, there is also tremendous demand for the CPA to become a true relationship professional and be a **Trusted Client Adviser**.

No matter your level in the firm, you can become a strategic partner to your clients and translate day-to-day client challenges into consulting opportunities. The Trusted Client Adviser Workshop provides a process and supporting tools to assist you in engaging in meaningful client dialogue, transforming client service and growing your practice. Facilitated by practitioners currently using the process in their own firms, the workshop will provide practical guidance and real-life examples on how to implement this service model.



Featured Topics

- ▶ Current professional trends
- ▶ Understanding, articulating and pricing value
- ▶ Presenting ideas internally and gaining leadership buy-in
- ▶ Engaging in thought-provoking conversations that get to the source of what keeps clients awake at night
- ▶ Preparing for and conducting an initial client consultation and client proposal meeting
- ▶ Enhancing firm unity



Year-Round Support

Not only will your clients receive year-round support as you make this transition, but you will, too! With your workshop attendance, you'll join a dynamic community of new and emerging Trusted Client Advisers for support and advice throughout the year. Your workshop experience includes:

- ▶ Quarterly follow-up coaching calls
- ▶ An invitation to the Trusted Client Adviser Alumni Group on LinkedIn
- ▶ A toolbox available for immediate download and customization*

**PCPS membership required*

One Workshop. Two Audiences.



Firm Owners — Presented in conjunction with state societies, this workshop is available for sole owners and small firms ready to better client service and enhance firm growth. Check the course listing at your state society for the next workshop!



Staff — Available for purchase by firms with 10 or more professionals, this workshop is available for firms wanting to motivate future leaders, enhance firm growth and improve firm atmosphere and cohesion. Call **800.634.6780**, option 1, or email aicpalearning@aicpa.org for more information on firm pricing. Please note that PCPS member firms receive a **20% discount**.