

CPA FIRM SUBSCRIPTION PACKAGE:

For an Annual Fee of \$2,000, the subscription would include:

Our Three Books (for your library and personal review):

- *Becoming a Trusted Business Advisor: How to Add Value, Improve Client Loyalty, and Increase Profits (member price \$59)*
- *Securing the Future, Volume 1: Building Your Firm's Succession Plan (member price \$69)*
- *Securing the Future, Volume 2: Implementing Your Firm's Succession Plan (member price \$69)*

Free access to \$600 of the Succession Institute Practice Management Institute (PMI), which is a QAS and Registry qualified online continuing professional education learning management system (this amount will give you access to about 20 hours of CPE on a variety of practice management topics, excluding our partner agreement course).

Free access to our video webcasts for up to five people for a minimum of four shows a year (retail value of about \$1,500). These programs would total 8 hours of CPE per year. Should SI put on more than four live video webcasts (or 8 hours of CPE), unless there are specific expenses associated with those particular broadcasts, like charges assessed to SI on a per attendee basis for use of a vendor's intellectual property, then those video webcasts also will be available at no additional cost. If additional charges are assessed, then SI would only charge the subscription attendees with those additional charges to attend.

Up to a one-hour diagnostic phone interview (currently a \$650 value for phone call consultation). This interview is conducted to obtain an understanding of the firm, as well as perceived strengths and weaknesses. Once the interview has been completed, we will identify a self-study series of programs the firm members should review in preparation for the next consulting session.

Up to a one-hour consulting phone call (currently a \$650 value). Once the firm members have completed their educational homework assignment(s), this phone call will be scheduled around the availability of all parties to continue moving forward with an action plan for improvement and change.

Succession Institute, LLC

Phone: 512-338-1006, ext. 106 (Jan), 100 (Melanie)

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Additional Consulting Assistance Discounted for Subscribers.

- *For subscribers wanting additional phone consulting beyond the free diagnostic and consulting calls, SI will provide additional hours through the remainder of the calendar year to its subscribers at \$500 per hour (\$150 below our standard phone call rate).*
- *Our daily on-site consulting rate is currently \$7,000 per day. However, SI will discount the first day of on-site consulting to subscribers to \$5,750 (a savings of \$1,250 for that day). If a firm wanted a second day of on-site consulting, we will offer that at \$6,250 (a \$750 discount for the second day). Additional days would be at our standard pricing. SI does not believe small firms will utilize more than one day of on-site consulting, but just in case, we are providing a sliding discount for the second day.*

The total benefits and discounts for the services and offerings within this subscription package can easily exceed **\$6,000** depending on the utilization of the benefits for a \$2,000 purchase price.

To view a short video about our CPA Firm Subscription Package, [click here](#).

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