SUCCESSION INSTITUTE

A GENERAL INTRODUCTION TO SUCCESSION INSTITUTE, LLC

The following includes some information on us and our firm. Certainly, there is more available on our website, but we have also included some specific links that might be of interest:

1. We have included the following link to a video introduction of Bill and Dom. Click the link to review our Introduction.

2. We are providing a link to a live video webcast we shot from our studio earlier this month on leadership (this is Part Three of a Three-part series reviewing our Dynamic Leadership™ model). The purpose of including this link simply is to demonstrate our capability to stream live video and create live and self-study programming to augment processes to consider or training. To watch this archived webcast, click the link Dynamic™ Leadership Part 3 of 3.

   Just click the phrase "view program" and you will be presented with a logon screen. For the user, enter "billreeb" and the password "leader3". Next, choose the streaming bandwidth that is best for your location. You can see the same introduction as shown above under item number 1 at the start of our archived webcast. You can drag the slider and skip the introduction to get right into the material of the webcast

3. The links to the summary resumes for Bill and Dom also are reproduced below:

   Bill Reeb, CPA, CITP, CGMA
   Dom Cingoranelli, CPA, CGMA, CMC®

4. If you are interested, we can e-mail you a two-year Managerial Leadership Training curriculum (partner in training) we conduct for a large, international CPA firm association. The program consists of seven two-day workshops, including four assessments, and augmenting the in-person workshops with webinars as well as one-on-one coaching, together with calls to mentors. Once again, this is just another example of the depth and flexibility of our training material.

5. We can e-mail you a Situational Leadership® flyer, which is the first two days of any of the management programs we commonly teach. This is a wonderful program that we tailor for CPAs from Dr. Hersey's materials (we are only one of a few of their affiliates licensed to modify and teach his materials) to help management understand how to do a better job of delegating to, and managing and developing, their people.

6. We also can e-mail you a sample report from our proprietary 360° assessment for your review as well. It is based on our proprietary competency framework for eight levels of positions within a CPA firm, from staff to partner. This robust feedback tool helps shareholders and managers more easily develop their people, provide more objectivity to very subjective areas and conversations. The feedback it provides increases accountability and promotes quicker change in historically difficult areas of personal development.

7. We offer business development training which is based on our book (as well as the workshops we developed for the AICPA) about learning how to deliver on our professions Trusted Business Advisor mantra. We can send you a flyer on the general contents of this workshop if you are interested, but each firm tends to customize the agenda a little to maximize the skills they want their partners and managers to develop. These workshops include lecture and experiential role-play exercises that support the materials covered, including special case studies we have developed when staff, seniors and managers are included in the training.

8. We have developed a learning management system (LMS). We are NASBA sponsored and are QAS and Registry approved, which means that all our self-study programs comply with high and rigorous educational standards. The link is:

   http://prosperitylms6.com/Req/successioninstitute/successioninstitute_student/

   Just click on "Search All Programs" and you will see a number of titles available. As well, we are currently in production on several more courses.

9. For many of our firms, the changes to be made in order to operate more effectively, profitably and sustainably require a change in the partner or shareholder agreement. One of our courses on our LMS is our SOP (Standard Operating Policy) partner agreement course for $3,500, which walks the participant through the central issues we address within firms, as well as providing a downloadable, modifiable copy of our sample LLC, LLP and PC variations of the agreement. The fee includes not only the forms and CPE, but consulting time with us and our attorney.

10. We have four books out currently with the AICPA: two on Succession, one on becoming a Trusted Business Advisor and the last one on Leadership/Self Improvement. We work with firms on everything from governance structure to succession; accountability to compensation; partners' roles and responsibilities to partner agreements; learning to manage people to performance systems; and more. If there is an area that deals with running a professional service firm, we have some experience to share.

11. Finally, following is a link to our website if you would like to know more about us:

    www.successioninstitute.com

As you can see from the information presented above, we are consultants, facilitators, trainers, coaches, authors, and content developers. And the reason we can successfully fill this variety of roles is because we work in the trenches with our clients to help them overcome whatever hurdles they face or to leverage the opportunities before them. We are not just theorists, but more importantly, practitioners who can help devise plans and assist in the change management process.