



## Upstream Academy Network Benefits

Upstream Academy Network is designed for firms that are intentionally striving to improve. We offer three tiers of membership to provide options for services and programs for firms of all sizes.



### Free Access to All Management Presentations

***Firm leaders need innovative ideas and best practices for successfully handling challenges and opportunities that present themselves each year.*** UAN membership includes free access (for all members of your firm who wish to participate) to 8-10 [Management Presentations](#) offered each year, plus access to the recorded session for one year after each presentation. These one-hour presentations are delivered via webinar and focus on the most relevant firm management topics. CPE is available for all Management Presentations for anyone who attends the live session or completes the self-study option.



### Access to Special Members-Only Presentations

***Firms need the ability to hear expert advice on topics relevant to them and similar firms that share their network.*** Three times a year, Upstream offers one-hour presentations specifically for UAN members. These presentations are recorded and available for members for self-study for one year after the presentation date. Topics can be requested by UAN Members and anyone who attends can apply for an hour of CPE.



### Enrollment in Emerging Leaders Academy

***Firms need to consistently cultivate high-yield, low-maintenance future partners.*** This three-year program develops your next generation of partners using a combination of virtual leadership development webinars and conferences, individual goal setting, mentoring by an experienced partner, and completion of firm projects. Membership includes:

- Tier 1: one free participant
- Tier 2: two free participants
- Tier 3: three free participants

UAN members can enroll additional participants for \$2,900 per participant.



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### Access to Career Development Series

**Firms need training to increase skills, confidence and ability across all levels of the firm.** Every year we present three series, each focused on a different firm level: below manager, manager and partner. Each series includes eight one-hour webinars, discussion questions and sample goals to help generate discussion and encourage participants to immediately implement lessons learned. Unlimited firm members can participate. Membership includes:

- Tier 1: one free series (Partner, Manager or below Manager)
- Tier 2: two free series (Partner, Manager and/or below Manager)
- Tier 3: all three free series (Partner, Manager and below Manager)

UAN members can enroll in additional series for \$1,800 per series.



### Access to Upstream Peer Network

**Up-and-coming firm leaders should be able to develop a strong network with peers from similarly sized firms.** Our virtual peer-networking group connects individuals interested in career growth and includes groups for managers, senior managers, partners, COOs, firm administrators, and HR, marketing and L&D professionals. Quarterly facilitated meetings provide a forum for sharing best practices, solving challenges and discussing the most common issues participants face as leaders. Membership includes:

- Tier 1: one free participant
- Tier 2: two free participants
- Tier 3: three participants

UAN members can enroll additional participants for \$850 each.

### Discount on Upstream Programs, Events and On-Demand Training

At 15% off (minimum), we guarantee you won't find our services and products priced lower than what you receive as a UAN member.

### Upstream Credit

With Tier 3, members can also choose one free option:

- **High Performance Firms** is a transformational two-year program that teaches best practices in key areas (culture, people, clients, growth) during four virtual workshops. (Includes one workshop for up to 20 participants)
- **Advisory Business Development** increases your participants' business development success during a year-long program by helping them take an advisory approach. (Includes up to 5 participants)
- **Launching Data Analytics** virtual BootCamp helps you build a data analytics service line for internal and/or client use. (Includes one BootCamp for up to 20 participants)
- **Leading Positive Change** virtual workshop teaches you how to increase success on any significant changes your firm undertakes. (Includes one workshop for up to 20 participants)
- **Launching New Services** BootCamp teaches a proven process to find and vet new ideas, determine pricing, build support and get clients excited about your new offering. (Includes \$5,000 off a custom session)
- **HeadWaters** and **BestPractices** are two-day events widely regarded as some of the best accounting industry conferences available. (Includes registration for up to 5 participants)