



The Future of CPA Firms and Its Impact on Strategy

Course Syllabus

- A discussion on the “Perfect Storm.” Never before in the history of the accounting professions have so many market factors played such a large role in the future success of accounting firms. Today’s accounting world is characterized by the “Perfect Storm”.
 - increased competition for quality clients and staff
 - thousands of baby-boomer partners retiring
 - unsuccessful efforts to retain more women in the profession to the partner level
 - a growing number of mergers and acquisitions
 - unfunded partner retirement liabilities
 - fee pressures and lack of next generation “rainmakers”
- A discussion on Trends and Predictions in the Accounting Profession for 2013/14 and beyond
- What factors determine a CPA firm’s “life cycle.”
- Partnership vs. Franchise/Corporate type structure.
- Future size and classification of firms.
- The Top 10 factors of developing a business strategy to remain an independent firm of the future.
- Succession planning and the choices firms will have in deciding the future direction of their practices.
- Discussion on current merger activity.
- Developing a successful merger & acquisition strategy.
- Implementing an “M&A Business Model” to bring your firm to the next level of success.
- How to market and promote your practice as an M&A firm of choice in this very competitive marketplace for quality M&A candidates.
- Professional liability risks and exposures in M&A transactions.

Maximizing the Value of CPA Firms

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