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Thomson Reuters Sixth Annual Partner Summit Series Kicks Off in Houston

Exclusive two-day thought leadership event to focus on client service and tech innovation in an evolving profession.

HOUSTON, May 16, 2013—The Tax & Accounting business of Thomson Reuters kicked off its sixth annual Partner Summit series this week, holding the first Partner Summit of 2013 in Houston, Texas. The two-day strategic planning event is aimed at principals from tax and accounting firms nationwide. The Houston event will be followed over the next several months by five sold-out Partner Summits in Phoenix, New Orleans, St. Louis, Minneapolis, and Atlanta.

The 2013 Partner Summits offer updated content, new guest speakers, and a fresh approach that incorporates the latest ideas while preserving the small, intimate format that has made the Summits so popular since their introduction in 2007. Partner Summits feature individualized instruction on big-picture aspects of running a dynamic practice from nationally recognized technology and workflow experts, on topics that include adapting to new challenges in the profession, formulating a growth strategy, and developing service offerings beyond compliance work, among others. This year's team of experts includes:

- **Paul Miller, Business by Design.** Paul Miller offers proven insights he gained through operating his own practice. He'll focus on how practitioners can move out of the commodity trade and into the trusted client advisor business, outline an innovative billing methodology that quantifies the value delivered by firm services with the fee collected from the client, and share entrepreneurial insights on how to better manage firm resources and improve client service.
- **Andrew W. McCracken, CPA, MAcc, Thomson Reuters.** Andrew McCracken shares his unique firm perspective and experience in the trenches to show firm leaders how to use technology tools and workflow best practices to increase workflow efficiency, use staff resources more effectively, and elevate client service.
- **Therese M. Witherow, Thomson Reuters.** Therese Witherow explains implementation strategies and proven approaches to initiating firm change while working with attendees to map out a customized action plan that will prepare them for a more progressive, client-focused future.

Attendees will take home a customized, actionable plan that maps out a path to a more efficient, profitable, and strategic future for their firm. They will also receive individualized instruction on best practices and progressive workflow trends in the profession, and will have the opportunity to exchange ideas with other professionals in a small-group setting.

The 2013 Partner Summit cities and dates are:

May 15-16	Houston, TX
June 19-20	Phoenix, AZ
June 26-27	New Orleans, LA
July 24-25	St. Louis, MO
August 21-22	Minneapolis, MN
August 28-29	Atlanta, GA



Thomson Reuters Partner Summits

Page 2 of 2
May 16, 2013

“Partner Summits have served as our flagship thought leadership event over the past five years, with a proven track record for helping firms identify untapped opportunities and develop a strategic move-forward business plan. We’re very pleased with our line-up of speakers this year and the overall agenda, which focuses on helping firm leaders improve their businesses and serve clients better,” said Scott Fleszar, vice president, strategic marketing, for the Tax & Accounting business of Thomson Reuters.

“With only 50 seats for each forum, we can offer a level of individualized attention that sets the event apart. The Partner Summits offer a broader business perspective on the profession rather than traditional training focused on product or compliance areas,” Fleszar said. “They’re about looking at how to more effectively operate a practice, build a successful and sustainable business model, and offer clients true advisory services. More and more, our customers are looking to Thomson Reuters for expert insight and thought leadership content over and above our products and services tailored to the profession. It comes as no surprise that the remaining 2013 Partner Summits are completely sold out, a trend extending four years back.”

The events also include fine dining, social events, networking, and more. For more information on the 2013 Partner Summits, visit CS.ThomsonReuters.com/Summits. Partner Summits are presented as part of the Thomson Reuters Summits Thought Leadership series, a collection of small, exclusive leadership forums that also includes the Payroll Summits. More information on Payroll Summits is available at CS.ThomsonReuters.com/PayrollSummit.

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