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Thomson Reuters Kicks Off Seventh Annual Partner Summits

Flagship thought leadership event offers individualized coaching from nationally recognized leaders

MINNEAPOLIS, Minn., May 7, 2014—The Tax & Accounting business of Thomson Reuters kicked off its seventh annual Partner Summits series today in Minneapolis, Minnesota. The two-day strategic planning event is aimed at principals from tax and accounting firms nationwide. The Minneapolis Partner Summit is the first of six events that will be held in cities across the United States.

The 2014 Partner Summits offer a fresh approach that incorporates innovative new ideas while preserving the small, intimate format that has made them so popular since their introduction in 2007. Limited to 50 attendees per city, Partner Summits feature individualized instruction from nationally recognized technology and workflow experts on big-picture aspects of running a dynamic practice. Topics include adapting to new challenges in the profession and formulating a growth strategy, among others. This year's expert speakers include:

- **Paul Miller, Business By Design.** Paul Miller offers proven insight on how practitioners can move out of the commodity trade and into the trusted client advisor business, an innovative billing methodology that quantifies the value delivered by firm services with the fee collected from the client, and entrepreneurial insight 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.

Each Partner Summit attendee will take home a customized, actionable plan that maps out a path to a more efficient, profitable, and strategic future. Attendees will also have the opportunity to exchange ideas with other professionals in a small-group setting.

The 2014 Partner Summit cities and dates are:

May 7 – 8	Minneapolis, MN
May 14 – 15	Atlanta, GA (sold out)
June 18 – 19	Seattle, WA (sold out)
June 25 – 26	Nashville, TN (sold out)
July 16 – 17	Salt Lake City, UT (sold out)
August 20 – 21	Newport, RI (sold out)

“Partner Summits have served as our flagship thought leadership event over the past six years, and I’m really pleased with how they’ve evolved,” said Rick Kursik, vice president, sales, Thomson Reuters and host of the 2014 Salt Lake City Partner Summit. “We’ve kept the small, individualized format that attendees love, while Paul Miller has really taken things in a fresh new direction. It’s about going



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beyond compliance and helping practitioners position their firm for success in a dramatically changed environment. The Partner Summits offer a broader business perspective on the profession rather than training focused on product or compliance areas. They're about looking at how to more effectively run a practice, build business, and serve clients."

The events also include fine dining, social events, networking, and more. For more information on the 2014 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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The Thomson Reuters CS Professional Suite provides the profession's most integrated, most sophisticated suite of tax and accounting software including tax prep and planning, accounting, practice management, payroll, research, and more. Created by accountants, for accountants, its unparalleled level of workflow integration, comprehensive thought leadership offerings, and link to expert content and insight power smoother workflows, more informed decisions, improved client service, and better results for tax and accounting firms of all sizes.

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