

SMALL FIRM SUBSCRIPTION PACKAGE:

For an Annual Fee of \$2,000, the subscription would include:

Our Three Books (for your library and personal review):

- *Becoming a Trusted Business Advisor: How to Add Value, Improve Client Loyalty, and Increase Profits (member price \$59)*
- *Securing Your Future: Volume 1, Succession Planning Basics (member price \$79)*
- *Securing Your Future: Volume 2, Taking Succession to the Next Level (member price \$79)*

Free subscription to the bi-monthly practice management e-newsletter (an e-newsletter distributed by your State Society with Bill Reeb as its editor and lead columnist)

Free Practice Management Tool Kit each year on whatever topic we create for that year. This would be an 8-10 page write up, or more, on a practice management topic (retail value \$99)

Free access to \$600 of the Succession Institute Practice Management Institute (PMI), which is a QAS and Registry qualified online continuing professional education learning management system (this amount will give you access to about 20 hours of CPE on a variety of practice management topics, excluding our partner agreement course).

- *If more than \$600 of self-study courses is desired in a given year, subscription members would receive an additional 15% discount off of the SI PMI published price.*

Free access to our video webcasts for up to five people for a minimum of four shows a year (retail value of about \$1,500). These programs would total 8 hours of CPE per year. Should SI put on more than four live video webcasts (or 8 hours of CPE), unless there are specific expenses associated with those particular broadcasts, like charges assessed to SI on a per attendee basis for use of a vendor's intellectual property, then those video webcasts also will be available at no additional cost. If additional charges are assessed, then SI would only charge the subscription attendees with those additional charges to attend.



Up to a one-hour diagnostic phone interview (currently a \$650 value for phone call consultation). This interview is conducted to obtain an understanding of the firm, as well as perceived strengths and weaknesses. Once the interview has been completed, we will identify a self-study series of programs the firm members should review in preparation for the next consulting session.

Up to a one-hour consulting phone call (currently a \$650 value). Once the firm members have completed their educational homework assignment(s), this phone call will be scheduled around the availability of all parties to continue moving forward with an action plan for improvement and change.

Additional Consulting Assistance Discounted for Subscribers.

- *For subscribers wanting additional phone consulting beyond the free diagnostic and consulting calls, SI will provide two additional hours of consulting to its subscribers at \$450 per hour (\$200 below our standard phone call rate). Additional hours beyond the four hours identified above (two hours free and two hours at \$450 per hour) will be charged at standard rates. SI does not expect small firms to need more than four hours per year of phone consulting support. But if they do, they will likely choose a day of on-site support in combination with their phone support.*
- *Our daily on-site consulting rate is currently \$6,500 per day. However, SI will discount the first day of on-site consulting to subscribers to \$5,000 (a savings of \$1,500 for that day). If a firm wanted a second day of on-site consulting, we will offer that at \$5,750 (a \$750 discount for the second day). Additional days would be at our standard pricing. SI does not believe small firms will utilize more than one day of on-site consulting, but just in case, we are provided a sliding discount for the second day.*

Total Value Excluding Discounted Consulting Rate for Subscribers is currently **\$3,716** for a \$2,000 purchase price. Should a firm utilize the additional two hours of phone consulting and one day of on-site support, they would be entitled to **\$1,900** worth of additional discounts making their subscription package value and savings total to **\$5,616**.

