

The Principa Alliance

We're making a difference. Join Us.

A LETTER FROM OUR CEO, RIC PAYNE

Hello,

I'm often asked the question what does Principa do?

Put simply, we help accountants around the world build and run better practices. To put that another way, we help accountants build a firm that is more productive, more fun, more profitable and more valuable.

It has amazed me how wide the gulf is between the best performing (measured in terms of profit per owner) and the rest. Typically the best are achieving twice what the rest are.

This is despite the fact that they're all servicing essentially the same type of clients, using the same technology and the same skill sets from more or less the same type of employees. The best performers are not always the biggest firms, in fact there is very little evidence of economies of scale in the accounting service sector.

My team and I at Principa have created a suite of tools and resources that will help you take your firm from good to great. You'll benefit from the work we've done with literally thousands of accountants around the world (first with my former company Results Accountants' Systems and now with Principa).

You'll also benefit from our understanding of what works and what doesn't. That translates to your learning curve being much less steep when you work with us.

Everything I have learned from the many, many talented people I've had the pleasure and honor of working with is encapsulated in the Accountants' Boot Camp™ and Principa's suite of tools and resources.

Goal is, quite simply, to help you create a practice that will enable you to repeat the words of one of our clients, Michael O'Kelley.



In a note to us he said...

"There is nothing more gratifying than seeing your plans and aspirations come to life. Perhaps more to the point, there is nothing more professionally gratifying than to have your clients tell you how much they appreciate the work you do for them AND being so willing to strongly refer you to their friends and associates."

Michael's words capture the essence of what we are all about. We want to help you realise your full potential as a professional accountant. We want to help you create a firm that your clients truly value, one that they are willing to refer to their friends and associates.

We want to help you get your zest back for what you do. That will mean bigger bottom line for you but we also know that at the end of the day, your reputation is the ultimate measure of professionalism so our focus is on helping you build a big future and an even bigger reputation as a business advisor.

In these rapidly changing times, opportunities abound - no matter what the state of the economy. In a struggling economy you have the opportunity to help your clients survive and in a strengthening economy you can help them grow and prosper.

I'm certain there are good times ahead for this profession. Just how good will depend entirely on how aggressively you seize the moment.

With that in mind, I invite you to be part of the Principa Alliance and reap the personal and professional rewards for many years to come. I look forward to working with you.

Ric Payne, President & CEO, Principa

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Benefit from On-demand Access to the World's Most Comprehensive Practice and Client Development Toolkit.

And get it all for less than 2 billable hours a month!



Differentiate your firm through Principa Alliance membership...

The Principa Alliance is already giving firms all around the world their competitive edge in the areas of Practice Development, Marketing and Business Development Services, and we'd love to help you discover what we can do for you too.

As a Principa member you'll enjoy on-demand access to the tools, systems, technology, training and support you need to build a highly successful and profitable accounting and business advisory practice. Plus you get to enjoy all the perks and benefits of belonging to an international network of accountants and advisors. Read on to discover the benefits of Principa Alliance membership...

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3 Membership Options: Your Choose

LEVEL 1: PRINCIPA ALLIANCE - BASE

As a Level 1 **Principa Alliance Member**, you'll discover a practice development process that has the potential to make you more productive, more effective, more client-focused and more profitable.

Our base level membership tools take the mystery out of growing your practice. You'll learn exactly how to deal with selected clients to add more value to them. You'll discover very simple systems to make the practice less dependent on you and you'll learn how to increase fees way beyond where they are now, without losing the clients you want.



LEVEL 2: PRINCIPA ACCOUNTANTS' ALLIANCE

Principa **ACCOUNTANTS' Alliance** members get everything in the base level PLUS some. In addition to a proven practice development process, you'll get access to people development tools, marketing systems, software, training and support - all designed to help you and your team understand exactly which clients to target, what services to deliver and how to price them appropriately. Firmly based from the numbers, membership of this group helps practitioners who enjoy running a more traditional accounting firm do what you love doing even better. Dramatically better.



LEVEL 3: PRINCIPA ADVISORS' ALLIANCE

Our most popular membership level; the **Principa Advisors' Alliance** level is perfect for forward thinking practitioners who want to get the best results possible from their accounting firm.

You'll be one of the select few to get the total Principa solution - practice development and business advisory tools, systems, technology, training and support. Membership in the **Advisors' Alliance** is a double-edged sword.

Not only will you learn how to build a highly successful and profitable accounting practice, you'll be fully equipped with the tools, know-how, systems and support you need to develop and build a highly successful and profitable consulting business too.



Enjoy all the perks and positioning benefits of belonging to a global network of accountants and advisors.

THE 'HOLY GRAIL'
"Principa continues to provide tools and resources that can easily be utilized by busy professionals. Tools that enable them to REALLY do Business Development work. For those of us in the profession that really want to make a difference to our clients business and their life, Principa is producing the Holy Grail."

Brad Sewell,
Bradley Sewell and Co,
Australia

END TO END BUSINESS BUILDING SOLUTIONS

- Practice development systems
- People development & success planning
- Marketing planning systems & toolkit.
- Manager development
- Business coaching systems
- Business analysis software
- Implementation support & professional development

20% GROWTH EACH AND EVERY YEAR

"I've been tracking our growth since I attended your Boot Camp a decade ago. By implementing your strategies we're averaging 20% growth each and EVERY year since Boot Camp. And we've never had more fun doing what we do. Thank you. It works!"

Mike Amspacher,
Amspacher & Svendsen,
USA

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SO MUCH FOR SO LITTLE

Depending on your individual needs, you can choose from 3 unique Principa Alliance Membership options. So, how do you know what membership group is right for you? Start by reviewing this Membership Comparison Matrix and take the next step to a better practice by contacting a Principa Practice Development Advisor to get started.

Get the top level for less than 2 billable hours per month!

Consider this, your investment in the top of Principa Alliance membership (*Advisors' Alliance*) works out to less than **2 BILLIABLE HOURS PER MONTH!**

That's a tiny price to pay for on-demand access to the full suite of practice development and coaching systems, analysis consulting software, client systems, marketing tools and personal support.



DISCOVER THE PRINCIPA MEMBERSHIP OPTION THAT'S RIGHT FOR YOUR FIRM

	PRINCIPA ALLIANCE	ACCOUNTANTS' ALLIANCE	ADVISORS' ALLIANCE	OPTIONAL TOOLS
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Delta4 Practice System™	●	●	●	
FirmPlan™ Practice Software	●	●	●	
Global Network and Community Access	●	●	●	
Principedia (Wiki) Online Knowledge Base		●	●	
Delta4 People System™		●	●	
ServicePlan™ Proposal Software		●	●	
Delta4 Marketing System™		●	●	
Delta4 Marketing PLUS Toolkit™			●	
GamePlan LITE™ Financial Software		●	●	
GamePlan™ Financial Analysis Software			●	
Delta4 Advisor System™			●	
Business DashBoard™ Monitoring Software			●	
Principa Referral System™			●	
Accelerate Implementation Programs™		●	●	
PDA Implementation Support		●	●	●
DVD + CD Training Programs		●	●	●
Principa Mastermind Coaching Group				●
VirtualFirm™ - Client Extranet/Firm Intranet				●
Principa U Conferences and Workshops				●