

CPA Firm

Regional Leadership Network



Are you looking for insights into some of your most challenging issues or simply seeking to develop more meaningful connections with other firm leaders? The CPA Firm Regional Leadership Network is your solution. This multistate virtual network offers facilitated discussions for leaders from similar-sized CPA firms, providing a forum for you to explore trends impacting your firm and to learn from the experiences of your peers.

Who it's for:

- CPA firms with between 2-20 staff.
- Enrollment in the program is limited to one participant, ideally at a leadership level, per firm and the subscription belongs to the firm.

Benefits:

- Provides a confidential, yet open forum for leaders across the Midwest to discuss what's working and what isn't.
- Topics will be driven by cohort participants prior to each meeting.
Examples include:
 - What's keeping you up at night?
 - Leadership, firm management, operational challenges
 - Client management
 - Technology
 - Private equity and succession planning
 - Other trends and emerging hot topics
- Serves as an avenue for leaders to learn from one another and develop long-term regional relationships.
- Online community to connect with your fellow cohort participants
- NEW: Optional 1.5 day in-person program with all network participants in Minneapolis to include speaker-led facilitated sessions and networking opportunities. Participants would be responsible for their hotel, travel, and a nominal fee.

How it works:

- Participants will be assigned to a virtual cohort which includes up to 15 leaders from firms across all participating states (IA, IL, IN, KS, MI, MN, MO, NE, ND, SD, WY).
- Participants will remain in the same cohort throughout the year and in subsequent years with the goal of establishing long-term valued relationships.
- Quarterly meetings will be facilitated by a CPA State Society representative and will last 120 minutes, with one hour dedicated to content and one hour to open forum discussion.
- Discussion shared during cohort meetings will be considered confidential to encourage open dialogue.
- The subscription year begins in early May followed by quarterly meetings for the balance of the subscription year as determined by the group. New cohorts will participate in a meet and greet launch meeting in February, 2026.

Fee:

- The fee is \$1,000 per firm per year and is non-refundable.
- The fee allows for one representative per firm.

More Information:

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