



March 2016

UPCOMING EVENTS

CPA Team Based Model Institute

April 21 & 22, 2016

2-Day training event in San Diego for financial advisors interested in working with the CPA Team Based Model. Interested in learning more? [Click here](#)

ARTICLE OF THE MONTH

By Dominique Molina, CPA, CTC

If you are determined to try your hand at partnering with CPAs to attract new clients, here are a few keys to consider:

- 1. Get trained on how to connect with CPAs** (and make sure they are trained to work with you). This includes communication and processes that provide structure for the relationship. Both parties in the venture should receive comprehensive training on how to work with each other to ensure a successful result.
- 2. Follow a model that trains you how to work together collaboratively on joint engagements.** This model should be used early on in the relationship and consistently to generate sustainable results for both businesses.
- 3. Use tools and resources designed for advisor and CPA joint ventures.** Software, marketing materials and other tools are essential to supporting joint engagements.
- 4. Have a source who can introduce you to multiple CPAs.** The saying "love at first sight" rarely occurs in real life. You may need to interview more than one accountant before finding "the one." This is much easier when being introduced by someone else.
- 5. Stop "referring out."** Instead, follow a process to collaborate on joint projects. This ensures quality and is ultimately best for the client. Everyone wins!

- Dominique Molina, CPA, CTC

Ms. Dominique Molina is the co-founder and President of the American Institute of Certified Tax Coaches (CTC). Dominique has successfully licensed more than 400 tax professionals as Certified Tax Coaches across the country, creating a national network of highly qualified professionals who provide proactive services for their clients. She is also a four time Amazon Best Selling author, discussion leader for the AICPA, and instructor for continuing professional education courses.



THE CPA TEAM BASED MODEL

The CPA Team Based Model is a proprietary system designed to help CPAs offer more proactive and holistic services to meet the continually-evolving needs and expectations of their clients. This is accomplished with the support and guidance of a specially-trained financial advisor, along with their top-notch team of specialists provided by ERT. When this partnership is developed with the mutual goal of delivering more meaningful value to the CPA's client, and the advisor becomes the go-to resource for all of the CPA's needs, a true win/win/win is created. Learn more at: www.elitert.com

OTHER EVENTS

April 21 & 22, 2016

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June 16 & 17, 2016

Elite Tax Planning Academy

Co-hosted with Certified Tax Coach, this educational event is designed to teach CPAs and financial advisors how to increase holistic and proactive planning, as well as learn from some of the top specialists in the country on a variety of planning topics. 16 free CPE credits offered.

[Click here](#) to register



July, 2016

CPA Team Based Model Institute

2-Day training event in San Diego for financial advisors interested in working with the CPA Team Based Model.

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