

## Membership Information

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# THE 2020 MEMBERSHIP GROUP FOR ACCOUNTANTS

The leading membership organization for independent accountants with over 1,500 members firms in the USA, Canada, Europe, Africa, Asia and South America.



# Message from Chris Frederiksen, CPA Chairman and CEO



I would like to invite you to join 2020 Group USA, an exciting new membership group for practicing accountants. The mission of the group is to help smaller and medium-sized independent firms be really successful.

In my career, I've been a sole practitioner, a partner in a multi-partner local firm, and a partner in 2 international firms. I know what it's like to be on the front lines running a practice. I am now a full-time consultant to the profession and established 2020 Group USA as the resource center for everything concerned with management, marketing and profitability of a practice.

We bring innovative ideas, new resources and initiatives to a growing group of like-minded accountants who are committed to building profitable practices. We are already the largest voluntary membership organization in several countries and have over 1,500 member firms worldwide.

## 2020 Group Products

### 2020 Direct Marketing Kit

Writing promotional letters doesn't come easy to most of us, so we've done it for you. The 2020 Direct Marketing Kit is an extensive collection of surefire marketing letters (and other promotional pieces) for the practicing accountant. Templates are included for direct mail to:

- Businesses
- Homeowners
- Existing clients
- Referral sources

These letters promote a wide range of services, including estate planning and business advisory services. You'll also find telemarketing scripts and press releases—everything you need for a comprehensive marketing program.

**Member Price \$150      Non-Member Price \$200**

### Successful Business Kit

The Successful Business Kit is a comprehensive guide to financial, tax and accounting considerations of running a business. We provide you with a Word document and you then create your own custom-made Successful Business Kit, by adding your name, logo and firm information. This is an excellent resource to provide to existing clients, new clients and all your referral sources. And don't forget to put several copies in your reception area!

The Successful Business Kit has been a great marketing tool for many firms (including my own), and we provide you with a number of suggestions for how to make this a really effective marketing tool.

**Member Price \$150      Non-Member Price \$200**

### Successful Partnership Agreements

Having a signed partnership agreement is one aspect of practice management often overlooked. This comprehensive guidebook contains sample provisions from real-life agreements in force today. This material will be invaluable as an index to the multitude of issues that need to be decided by you and the fellow owners of your CPA firm. For example you might:

- Currently have no formal written agreement within the firm;
- Be planning to admit new partners; or
- Find your current agreement outdated and no longer appropriate

Using this material, you will easily be able to develop an extremely comprehensive draft of a partnership or P.C. agreement for discussion with your attorney. You can therefore expect substantial savings in time, effort and fees.

**Member Price \$395      Non-Member Price \$495**

### 2020 Business Consulting Kit

Accountants are in a unique position to influence their business clients. The 2020 Business Consulting Kit gives you what you need to successfully add business advisory services to your practice.

The kit is organized into 4 key areas:

- Strategy
- Marketing
- Finance
- Management

It provides you with numerous checklists, forms and spreadsheets that you can use to better serve your clients.

**Member Price \$395      Non-Member Price \$495**

**All products and services, including membership, are sold on a satisfaction guaranteed basis. If for whatever reason, you are not 100% satisfied, call 2020 on 800 788 0190.**

# Benefits of 2020 Membership

## 2020 Audio Series

Each month you will receive an audio CD addressing a topic of current interest to CPAs in practice. This is usually an interview with a leading consultant or practitioner and is designed to be immediately relevant to your practice. The topics focus on the management, marketing and profitability of a practice. Recent CDs have covered:

- Marketing
- Mergers and Acquisitions
- People Issues
- Managing in Difficult Economic Times

\* Members receive the next title in the series from when they join. Previous titles are available for purchase as a series (Members only).

*"The Audio Series is a key tool our practice uses to keep up to date with the latest trends and ideas in the industry. Each Partner and Manager listens to it and the content and ideas are discussed in our monthly Partners meeting."*

## Members Only Resources

Members have access to a growing library of resources covering a wide range of subjects from strategic planning to lead generation, public relations and accounts receivable management. Resources include sample agreements, letters, agendas and checklists. There are also seminar outlines with slides and invitations and various letters to be sent to clients to promote your practice.

## 2020 Flash

We don't send you a newsletter (you probably get too many already!) Instead we'll provide you with new ideas and industry updates through our 2020 Flash. It's a regular brief e-mail to keep you informed about what's going on in other practices.

## Preferred Pricing on 2020 Conferences, Seminars and Products

We conduct numerous events around the country and members receive discounted pricing. We have also created a number of products including the 2020 Direct Marketing Kit, the Successful Business Kit and the 2020 Business Consulting Kit—members also receive significant discounts on these products.

## Discounts on other services and events

The size of our membership group means we have bargaining power. 2020 Members enjoy discounts on a growing number of products and services. Contact us to find out more.

## Client Relationship Letters

It's more important than ever to stay in touch with your clients on a regular basis. Each month, we'll send you a pre formatted letter to send to your clients. It will address a specific business issue (such as profitability, cash management, payroll) and explain how you can help them. Insert each client's name and address, sign the letters and you're done—it's that easy!

## 2020 Connect

2020 acts as an information resource. We can connect you with other members, other consultants and various vendors to get answers to your questions. If, for example, you're looking for a sample of a particular document, we'll do our best to find it for you.

*2020 is committed to continually growing the Resource Center. A growing membership allows us to dedicate more resources to developing new tools for our members. We regularly ask our members what tools and resources they need and often ask members to contribute to the resource center their own proven letters, checklists, forms and ideas.*

*"The Resource Center has become our first port of call for marketing letters and other useful forms. Saves us reinventing the wheel."*



## Your Annual Investment

As a matter of policy we have endeavored to keep the cost of membership low so as to encourage firms of all sizes to join.

Sole Practitioner	\$350
2-3 Partner Firm	\$400
4-5 Partner Firm	\$450
6+ Partners	\$500

**Our growing membership, along with the ongoing growth of our international affiliates, means we are able to add new resources for the benefit of all members.**

# 2020 Group Services

## 2020 Partner Retreats

We facilitate Partner Retreats. Our thorough process starts with developing an agenda specific to the firm; it includes confidentiality surveying the staff and finishes with the development and an update of the firm's strategic plan. 2020 Consultants will guide the partners of firm to answer these key questions:

- Where is the firm now?
- Where do we want the firm to be in 5 years time?
- What do we need to do to get there?
- What's our action plan?

As an outside facilitator we are able to drive change and cause actual progress. The outside facilitator has no personal agenda and can therefore be independent. The facilitator is retained by and works exclusively for the firm, not for any individual. Depending on the size of your firm, the optimal time for a Partner Retreat ranges from 1 day to 2.5 days.

*"The Focus Group continues to be the best forum for our firm leaders to meet other like-minded accountants and share a wide range of ideas to move our firm in the right direction."*

## 2020 Focus Groups

Focus groups consist of individuals from similar-sized firms who come together twice a year to work on strategy and practice issues, share ideas and plan for the future. In these one-day meetings, each firm reviews its accomplishments since the last meeting and at the end of the day, each firm details what they plan to achieve in the next six months. Firms that participate in Focus Groups are statistically more successful than their peers—it's all about new ideas, focus and accountability.

## 2020 Personal Development Program

The need to identify, motivate and develop your team members has never been greater. The 2020 Personal Development Program has been expressly designed for new partners and managers with the potential to excel. It includes skills development in:

- Firm operations and administration
- Managing clients and staff
- Practice development
- Presentation skills
- Becoming a "famous person"

## Client Satisfaction Surveys

Do you know what your clients care about? Do you know their concerns when dealing with your firm? And do you know what other services your clients are interested in receiving? We have now surveyed more than 12,000 accounting firm clients. When asked the question, "In the last 12 months, have you seriously considered changing accountants?", 31% said "YES!"

If you're not listening to your clients and adding value, you risk losing them to your competitors. A Client Satisfaction Survey will uncover the key concerns of your clients, identify those that are "at risk" and document the services your clients really want.

## Mergers & Acquisitions

M&A activity among CPA firms is accelerating. Some firms are seeking to expand their practices to increase their profitability, offer greater opportunities to staff and better serve growing clients. Due to the changing demographics of the profession, many are looking to exit the profession.

We offer a customized consulting service on a fee basis (we are not brokers) and can help you whether you're looking to buy, sell or merge. We work actively with other consultants in the profession around the country. We also maintain a database of firms looking to buy or sell.

## 2020 Coaching

High performing athletes have coaches to push them, to provide expertise and insight, and ultimately, to win. Our firm coaching program is no different. This 1-on-1 program is designed to enhance your firm's performance by first, identifying your goals and objectives, and second by monitoring your key performance metrics to assess your progress. Monthly phone calls will keep you focused on doing the right things in your firm and on track to achieve your goals.

*"Having a client survey addressed what our clients really thought of us, some of the responses were truly surprising. We identified some clients where we thought we had done a great job, who were actually unhappy and considering leaving, and a handful of clients who we thought may be unhappy, actually really valued the service! We were able to save those relationships at risk, and put in place procedures to build upon our added value services. The process was extremely worthwhile and will be repeated next year."*

For more information on any of our consulting services, please call 2020 Group USA on 800 788 0190, visit our web site [www.2020groupUSA.com](http://www.2020groupUSA.com) or e-mail [info@2020groupUSA.com](mailto:info@2020groupUSA.com).

# How to become a 2020 Member



## 1. Mail your application to:

2020 Group USA  
5768 Paradise Drive, 2nd Floor  
Corte Madera, CA 94925

## 2. Fax your completed application to 415 924 3105

## 3. Email your completed application to [info@2020groupUSA.com](mailto:info@2020groupUSA.com)

## 4. Join online @ [www.2020groupUSA.com](http://www.2020groupUSA.com)

## 5. Telephone 800 788 0190

## Testimonials

*"I wanted to say a big thank you. Your advice means a lot to me and our team and we really appreciated 2020 taking the time to discuss with us our key areas of concern. Thank you!"*

*"I listened to the latest CD, Yes! You Do Need Marketing on my way home - all of it great stuff! I couldn't concentrate on anything else for the rest of the evening thinking about ways I can implement your ideas in my practice. The CDs are well worth the cost of Membership to the 2020 Group. I'm already looking forward to the next edition."*

*"Geared for small CPA firms and constantly reinforces where our Firm is headed. "*

*"2020 has opened my eyes to new opportunities, energizing me to take my firm to the next level.....The future is bright! "*

*"Last year was a great one for us! Thank you for your continued input and new ideas. We sat down for our planning day and began with your CD on practice development and followed that with notes from your seminar. I had 12 staff say it was the most interesting and best time they had spent in a firm meeting. Thanks for all your hard work bringing this information to us local guys. "*

**Membership of the 2020 Group is an investment in your future. 2020 Members are committed to growing their practices and delivering more value to their clients. We invite you to join us. For further information on 2020 Membership, or to join, please call 800 788 0190.**

# MEMBERSHIP APPLICATION FORM



Firm Name \_\_\_\_\_

Address \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Contact Name \_\_\_\_\_

Email Address \_\_\_\_\_

Additional Contacts \_\_\_\_\_ Position \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Membership Category	Annual Fee	
Sole Practitioner	\$350	<input type="checkbox"/>
2-3 Partners	\$400	<input type="checkbox"/>
4-5 Partners	\$450	<input type="checkbox"/>
6+ Partners	\$500	<input type="checkbox"/>

ADD 2020 Products	Member Price		Non-Member Price	
2020 Audio Series - Library of Prior CDs	\$150	<input type="checkbox"/>	N/A	<input type="checkbox"/>
2020 Direct Marketing Kit	\$150	<input type="checkbox"/>	\$200	<input type="checkbox"/>
Successful Business Kit	\$150	<input type="checkbox"/>	\$200	<input type="checkbox"/>
Marketing Your Services For Those Who Hate to Sell	\$ 25	<input type="checkbox"/>	\$30	<input type="checkbox"/>
2020 Business Consulting Kit	\$395	<input type="checkbox"/>	\$495	<input type="checkbox"/>
Successful Partnership Agreements	\$395	<input type="checkbox"/>	\$495	<input type="checkbox"/>
2020 Product Bundle (all of the above)	\$795	<input type="checkbox"/>	\$1195	<input type="checkbox"/>

Total \_\_\_\_\_

## Payment Information

By Credit Card: Visa  MasterCard  Amex

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Cardholder's Name \_\_\_\_\_

Cardholder's Address (if different to above) \_\_\_\_\_

Signature \_\_\_\_\_

By check made payable to 2020 Group USA

By returning this form you agree to 2020 Group USA processing and storing your data for the provision of products and services, analysis and administration purposes. We may use your details to send you information on other products or seminars. If you do not wish to receive such communications please check this box.