



Member-driven | Client-focused



Be independent, but don't go it alone.

At Allinial Global, we understand and celebrate the entrepreneurial spirit embodied by the 140+ independent accounting and consulting firms that we serve. Many of our members left big public accounting firms because they believed they could provide superior service to their clients by establishing their own independent practices. Still, they needed additional resources in order to grow and compete with larger firms on a global scale.

The solution? Allinial Global, an accounting association “all in” to providing knowledge for independent firms from independent firms.

Allinial Global offers a wealth of tools and resources customized for the needs of independent accounting and consulting firms. But beyond these on-demand tools and products, membership in Allinial Global connects you to like-minded professionals in member firms throughout the Americas, EMEIA (Europe, the Middle East, India, and Africa), and the Asia Pacific Region. Your association membership includes staff support and over 200 educational and networking opportunities each year covering the areas of People, Client Service, Growth, and Firm Management.

To apply for membership and learn more about Allinial Global, visit allinialglobal.com.



Add these services to your firm.

Allinial Global provides a robust set of services for independent accounting firms to help them grow, compete, and thrive. Composed of four core and eight key impact areas, our services and membership base provide a strong resource community for member firms. From training to international connections and marketing resources, we help our independent firms compete more effectively with larger firms on a global scale.



PEOPLE

Build your future by investing in your most valuable resources.

Human Resources

Your people are your greatest asset, and Allinial Global has the resources you need to help them thrive. In addition to holding an annual Human Resources Conference covering the latest HR trends, we have a dedicated HR professional on staff to assist you with specific issues, and we offer a range of custom tools and resources, including:

- RETAIN assessment program to uncover underlying issues and make valuable improvements in employee performance and communication
- Pulse Performance Development, a streamlined and dynamic approach to employee performance that integrates strengths-based coaching and delivers just-in-time feedback
- HR Best Practices Manual featuring a wealth of member-tested insights on everything from recruiting and retention to work/life balance and beyond

"I'm where I am today because Allinial Global does such a great job with their leadership training. Staying relevant for clients and staff is necessary and can be very rewarding."

"Participating in EWG has made me a better leader, a more effective firm manager, a better listener, a better consultant, and a better person."

"This type of program cannot be achieved anywhere else. Having the opportunity to discuss, provide, and receive critical feedback in a safe environment is of significant value."

PEOPLE

Build your future by investing in your most valuable resources.

Learning & Development

At Allinial Global, we know that experienced, well-trained professionals can better serve the needs of their clients, so we offer a full suite of professional development options to help you support employees "from hire to retire." Tailored specifically for Allinial Global members and unavailable anywhere else, our professional development programs include:

- Over 200 educational opportunities each year, both in-person and virtual, domestic and international
- NASBA-certified Continuing Professional Education (CPE) and on-the-job training for staff professionals in all career stages and specialties
- Partnerships and member discounts with industry leaders like CPEasy, WoltersKluwer, Surgent Professional Education, Gleim Accounting, and the Whetstone Development Group

Leadership Progression Program

Become a leader you'd like to follow.

The cornerstone of our professional development library, the Allinial Global Leadership Progression Program is unlike any other. Built on 20 years of experience and featuring the expertise of seasoned industry leaders and renowned scholars like Ashish Nanda of Harvard University, the Leadership Progression Program addresses six levels of management training that will help your firm implement a sustainable approach to leadership.



CLIENT SERVICES

Expand your expertise and geographic reach with vast experience and global vision.

International Connections

Whether you're answering complex retirement questions for a client who lives and works abroad or helping a foreign corporation navigate state-specific trade zone qualifications, Allinial Global has you covered. With dedicated staff liaisons and member firms in over 140 countries throughout the world, we're ready to help you secure the highest quality solutions to your business needs. Tap into the power of a global community with a range of international connections and resources, including:

- Immediate assistance with inbound and outbound referrals through connections to firms with advanced international tax and audit capabilities
- A pioneering approach that identifies client solutions based on the destination and skill set, complete with an online expertise-matching portal where you can locate firms by specialty niche and location
- International communities, training programs, and in-person events to strengthen capabilities in areas like marketing, IT, human resources, etc.



CLIENT SERVICES

Expand your expertise and geographic reach with vast experience and global vision.

Technical Support

With Allinial Global, there's no topic too obscure, no question too complex to be answered by the expertise of our members and the depth of our technical resources. Take advantage of round-the-clock support and best-in-class technical training designed for members and coordinated by a Vice President of Technical Services with nearly 30 years of experience in the accounting industry. We offer the following technical support resources:

- Timely and relevant technical training that addresses new standards and emerging issues in tax, audit, assurance, and advisory services
- Extensive member-to-member knowledge sharing both in-person at roundtable discussions and conferences and virtually through our online discussion forum and specialty niche communities
- Access to EY Client Portal, a reference library of A&A and Tax information, as well as ProfitCents for financial benchmarking, and First Research, an online database with hundreds of industry profiles and reports

"This organization is an exceptional place for members to connect."

GROWTH

Learn from your peers,
not your competition.

Communities of Practice

Membership in Allinial Global connects you to a worldwide community of over 10,000 independent CPA professionals who generously exchange expertise and advice in their respective practice areas. Our unique Communities of Practice concept encourages members to work together in order to help each other learn and grow, providing you with:

- Over thirty member-led communities offering conference calls, webinars, and fly-ins throughout the year
- The ability to connect on three different levels: by industry (real estate, biotech, etc.), service offerings (fraud investigation, forensic accounting, etc.), and function (firm administrators, business development, etc.)
- Opportunities to collaborate with fellow Allinial Global members to win new business and grow specific niche or practice areas



GROWTH

Learn from your peers,
not your competition.

Marketing Resources

At Allinial Global, we understand the unique challenges of marketing at an independent accounting firm, and we maintain an in-house team of marketing professionals who work closely with member firms to support their practice growth efforts. We offer a range of services and products that save you time and help your firm stand out in a competitive environment, including:

- A library of turnkey resources for your content marketing needs, including industry newsletters, work-saving templates, and tax publications and guides
- Benchmarking tools and how-to guides addressing a variety of topics ranging from digital marketing and website upgrades to budgeting and branding considerations
- Access to a vibrant community of marketing and business development professionals who meet both in-person and virtually to share best practices and strategies to optimize growth



FIRM MANAGEMENT

Take advantage of our cache of industry-focused administrative and technology resources.

Information Technology

Staying current with today's technology can be daunting, especially when dealing with sensitive client information and complex tax and accounting software. In addition to providing a community that addresses the unique needs of IT professionals in an accounting firm setting, Allinial Global offers the following information technology resources:

- An Annual Technology Survey providing detailed insights on our members' use of technology, including hardware, software, infrastructure, security, processes, and policies
- Conference calls and webinars with top vendors and manufacturers, as well as an annual roundtable to connect with fellow IT firm professionals and stay current on technology trends
- An online Information Services community and members-only website where you can access a resource directory and exclusive technology specs and reviews



FIRM MANAGEMENT

Take advantage of our cache of industry-focused administrative and technology resources.

Practice Management

Measuring success can be challenging for independent CPA firms, but with the right tools, you can make informed decisions that improve your processes and profits. Make sure your firm is operating at its full potential and poised to take the right path for the future with Allinial Global's practice management resources, which include:

- A comprehensive Firm Management Review conducted within first year of membership and followed by assignment of a mentor firm with similar goals
- Conferences, roundtables, and confidential work groups designed specifically for firm leaders and executives
- Annual Financial Survey to help you gauge your firm's performance in comparison to fellow members with respect to over 500 different data points





Fostering our members' growth and prosperity since 1969

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