



APRIO ALLIANCE FORUM 2026

The Intentional Firm

STRATEGY • GROWTH • LEGACY

Breakout Sessions Available By Track

Breakout sessions are grouped into tracks to help attendees quickly identify content aligned with their role and strategic priorities. These tracks are not intended to be followed exclusively. All sessions are open to all attendees, allowing you to customize your learning experience by selecting the sessions most relevant to your goals and interests.

Choose the sessions that inspire you to Grow Smarter, Grow Stronger, and Grow Now!

BUSINESS DEVELOPMENT & MARKETING

Who it's for: Those who own client relationships, drive revenue, or are responsible for building the firm's pipeline — including client-serving professionals at every stage of building their book, anyone who leads or contributes to a service area's growth, and those with formal responsibility for marketing or business development.

The demand creation track. In an intentional firm, business development is not just a marketing team function. It is a discipline practiced by anyone who owns a client relationship. This track focuses on building institutional growth infrastructure that is repeatable and does not depend on any one person's network. It is equally relevant whether you are growing your own book of business, building a service area's market presence, or designing the firm's go-to-market strategy.

TUESDAY, OCTOBER 27 FROM 10:45 A.M. – NOON

Building the Growth Engine: From Intention to Infrastructure

Transform growth from accident to design with a firm-level growth engine. Learn the structures and disciplines that turn BD from a partner personality trait into a repeatable institutional capability, then build your growth blueprint.

TUESDAY, OCTOBER 27 FROM 2:45 P.M. – 4:00 P.M.

AI for Marketing, Growth & Business Development Leaders: Rebuilding Your Playbook

A peer conversation for marketing and BD leaders on rebuilding the playbook. Cover AI-assisted content creation, pipeline and prospecting tools, digital marketing efficiency, and measuring ROI with data.

WEDNESDAY, OCTOBER 28 FROM 10:45 A.M. – NOON

Marketing That Earns Attention: Thought Leadership, Digital, and AI-Assisted Content That Converts

Focus on content and digital marketing strategies that actually convert to pipeline. Learn practical frameworks for thought leadership, and where AI is changing what's possible for firms without large marketing teams.

WEDNESDAY, OCTOBER 28 FROM 2:45 P.M. – 4:00 P.M.

Building a BD Culture: Making Growth Everyone's Job

Build a culture where growth is everyone's responsibility. Learn how to set business development expectations that stick, reward growth behaviors at every level, and address partners whose client work is excellent but whose book never grows.



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STRATEGY • GROWTH • LEGACY

CLIENT SERVICE & GROWTH

Who it's for: Those who own client relationships; partners and professionals responsible for a service area or line of business, whether as a named leader or as the person who effectively drives how that discipline grows; and anyone who is actively managing and expanding a portfolio of client work.

The portfolio and revenue optimization track. The most immediate growth opportunity for most firms sits inside their existing client base, with the people who already serve it. This track is for everyone whose growth challenge is: how do I deepen these relationships, expand into adjacent services, protect what I have, and position my service area for what comes next? AI-driven changes to service delivery, pricing, and staffing are an explicit part of this conversation, not a separate topic.

TUESDAY, OCTOBER 27 FROM 10:45 A.M. – NOON

Advisory as Your Operating Strategy, Not a Service Line

Discover how redesigning your firm around advisory changes everything – how you win clients, price work, staff engagements, and measure success. Includes a diagnostic to assess where you sit on the advisory maturity spectrum.

TUESDAY, OCTOBER 27 FROM 2:45 P.M. – 4:00 P.M.

AI for Audit Leaders: What It Means for How Your Practice Works

A peer conversation on AI in audit work today. Explore AI-assisted fieldwork, quality control and supervision changes, team structure evolution, and how to communicate with clients about AI in the audit process.

AI for Client Relationship Owners: Using AI to Deepen and Grow the Relationships You Have

For client relationship owners, explore how to use AI to prepare better, identify expansion opportunities, talk to clients about AI, and protect relationships during industry disruption.

AI for Tax Leaders: What It Means for How Your Practice Works

A peer conversation on AI in tax work today. Discuss first-pass automation, staffing model changes, client communication about AI-assisted work, and governance frameworks drawing on real firm experience.

AI for CAS Leaders: What It Means for How Your Practice Works

A peer conversation for CAS leaders where AI disruption is most immediate. Discuss delivery model transformation, pricing in an automated environment, advisory repositioning, and retaining clients against automated alternatives.

WEDNESDAY, OCTOBER 28 FROM 10:45 A.M. – NOON

Client Account Planning Workshop: Bring a Real Client, Work It With Peers

Bring a real client situation and work it with peers using a structured framework. Identify service gaps, surface collaboration opportunities, and use AI advisors to stress-test your account strategy in real time.

WEDNESDAY, OCTOBER 28 FROM 2:45 P.M. – 4:00 P.M.

Growing Your Service Area: When to Build, Buy, or Partner

Get a decision framework for when to build, buy, or partner as client needs evolve. Learn how the Alliance creates a third path many firms overlook, especially for cross-border and multi-jurisdictional needs.

Pricing for the Value You Create: Moving Beyond the Billable Hour

Learn why pricing is the highest-leverage financial decision most firms make least intentionally. Explore pricing models – fixed-fee, subscription, value-based – and leave with a pricing strategy and client conversation plan.

Exit Strategy and Succession: Building the Options You Want to Have

Cover the full spectrum of exit strategies – internal succession, merger, PE, and gradual transition – with a focus on financial, legal, and emotional dimensions. Includes a self-assessment tool for evaluating your firm's readiness.



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CONTINUED WEDNESDAY, OCTOBER 28 FROM 2:45 P.M.
– 4:00 P.M.

The Focused Firm: How Deep Industry Expertise Becomes Your Most Powerful Growth Strategy

Discover why the fastest-growing firms have gotten more selective through deep industry focus. Learn how to evaluate existing concentrations, what building a genuine industry practice requires, and lessons from firms that made the leap.

Rethinking Delivery Capacity: Building a Scalable Staffing Model for an AI-Enabled Firm

Reframe staffing as a capacity strategy, not just cost. Learn how to build delivery infrastructure – onshore, offshore, nearshore, or AI-assisted – that lets your best people focus on high-value work without sacrificing quality.

Protecting and Growing Your Most Important Relationships During Industry Disruption

Learn how to identify at-risk client relationships before it's too late and deepen advisory value with clients that matter most. Leave with a relationship risk assessment for your own book of business.



APRIO ALLIANCE FORUM 2026

The Intentional Firm

STRATEGY • GROWTH • LEGACY

STRATEGY, VISION & FUTURE

Who it's for: Those who set direction for the firm — owners, partners with firm-level responsibility, and anyone who shapes where the firm is going and what it is building toward. In smaller firms, this may include partners who play multiple roles simultaneously.

The direction-setting track, where strategy meets legacy. This is the integrated track for decisions about where the firm is going, what it will be worth when it gets there, and how to navigate the external forces reshaping the profession: PE, AI, consolidation, and demographic change. Content covers both near-term execution discipline and long-term positioning, because for most firm owners and partners, these decisions are made together, not in separate conversations.

TUESDAY, OCTOBER 27 FROM 10:45 A.M. - NOON

Know Your Number: What a Sophisticated Buyer Would See If They Looked at Your Firm Today

Discover what sophisticated buyers actually see when they evaluate your firm's enterprise value. Learn where value is eroding, what commands premiums in today's market, and the specific actions that move the needle whether your exit is 3 or 10 years away.

The Strategy Execution Gap: Why Accounting Firm Plans Break Down — and How to Fix It

Learn why accounting firm strategies fail in execution and how to fix it. This session covers the structural decisions — quarterly priorities, resource allocation, and accountability systems — that determine whether your plan survives beyond the retreat.

AI Strategy for Your Firm: Moving from Pilot to Plan

Move past the AI hype to build a real firm-level AI strategy. This session covers investment decisions, where AI creates genuine leverage, and how to develop a plan spanning service delivery, business development, and operations.

The Economics of Independence: Building Competitive Advantage in a PE-Reshaped Profession

Examine how independent firms compete in a PE-reshaped profession. Learn what independence costs, requires, and how to use strategic agility and the Alliance as a force multiplier against PE-backed competitors.

Running the Firm on Data: KPIs, Dashboards, and Building an Accountability Rhythm

Replace instinct-based management with a practical KPI framework. Build a leadership dashboard covering financial, operational, client, and talent metrics — and create an accountability rhythm that turns data into decisions.

TUESDAY, OCTOBER 27 FROM 2:45 P.M. - 4:00 P.M.

AI for Firm Owners & Strategy Leaders: Making the Decisions That Actually Matter

A peer conversation for firm owners on AI decisions that matter. Cover investment choices, governance and partner alignment, firm-level client communication, and managing staff concerns during AI adoption.

WEDNESDAY, OCTOBER 28 FROM 10:45 A.M. - NOON

Peer Forum: Growing at Scale — When Complexity Becomes the Challenge (\$20M+)

A peer forum for \$20M+ firms facing strategic complexity. Discuss deliberate investment in new markets, M&A as a real option, managing the partner group, and positioning on the PE question with peers who've solved the infrastructure problem.

Peer Forum: Building the Infrastructure of Growth (\$5–20M)

Partners and owners of firms in the \$5–20M range — or any firm where the primary challenge is building the systems, team, and operating model to sustain growth you are already experiencing or actively pursuing.

WEDNESDAY, OCTOBER 28 FROM 2:45 P.M. - 4:00 P.M.

Firm Economics: Building a Practice That Grows Profitably

Dig into the financial mechanics that separate profitable growth from just more work. Cover engagement-level profitability, partner compensation that rewards the right behaviors, capacity planning, and margin decisions that compound.



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LEADERSHIP, CULTURE & TALENT

Who it's for: All partners and professionals who hire, develop, lead, or retain people — whether as a primary responsibility or as part of a broader practice. This includes anyone with accountability for the human infrastructure of firm growth.

Growth strategies fail not because the strategy is wrong but because the culture, leadership behaviors, and talent infrastructure can't carry them. This track addresses the human operating system of the firm: partner alignment, talent development, culture, and succession, all through the lens of growth enablement. AI's impact on how firms develop talent and build advisory capacity is an explicit thread throughout.

TUESDAY, OCTOBER 27 FROM 10:45 A.M. - NOON

Talent in the AI Era: Attracting, Retaining, and Developing the Professionals Your Firm Needs Now

Address the structural talent shortage while rethinking early-career development for an AI era. Discover what's actually working in attraction and retention, and how Alliance firms can collectively solve problems individual firms can't.

TUESDAY, OCTOBER 27 FROM 2:45 P.M. - 4:00 P.M.

AI for Talent, People & Culture Leaders: Rebuilding the Development Model

A peer conversation for talent and HR leaders on rebuilding the development model. Discuss early-career development when repetitive work is automated, recruiting in an AI era, upskilling, and managing culture during change.

WEDNESDAY, OCTOBER 28 FROM 10:45 A.M. - NOON

Leaders Forum: Managing Partners — Challenges in Scaling the Firm

Learn why accounting firm strategies fail in execution and how to fix it. This session covers the structural decisions — quarterly priorities, resource allocation, and accountability systems — that determine whether your plan survives beyond the retreat.

Partner Alignment and Accountability: Getting Everyone Pulling in the Same Direction

Address the uncomfortable reality that not all partners contribute equally. Learn to build partner scorecards, tie compensation to contribution, navigate difficult conversations, and create mutual accountability without destroying the partnership.

WEDNESDAY, OCTOBER 28 FROM 2:45 P.M. - 4:00 P.M.

Culture as Competitive Advantage: Building What the Next Generation Wants to Be Part Of

Discover what culture means in practice to the next generation. Hear from firm veterans and emerging professionals on flexibility, development, belonging, purpose, and the leadership behaviors that build or erode it.