



Register for Financial Firepower and AMR guarantees you will double your profitability and have a better handle on your company. We guarantee this will be one of the most valuable programs you can attend. Attending could be worth millions.

We limit registration to just 12 companies. We do this so we can discuss strategies and challenges on a one-on-one basis. We want you to be able to participate in your own learning experience.

Most agency owners think that they will be able to sell their company for enough money to retire. It just doesn't happen. Less than 1 in 10 agencies sells or merges, and those that are lucky enough to sell rarely receive full payment or enough money to fill their retirement needs.

The FINANCIAL FIREPOWER MANAGEMENT ROUNDTABLE is all about building the company with the owner(s) receiving maximum benefit from the company. The agency is turned into a cash machine that funds the investment portfolio so there is enough to send children to college and have a comfortable retirement.

A great company not only provides for the owners, but for its employees. A properly developed cash machine provides great profits to pay fair wages, provide great benefits, and offer the opportunity for employee growth and professional satisfaction.

FINANCIAL FIREPOWER MANAGEMENT ROUNDTABLE

AMR has spent years helping owners build their companies with AMR financial strategies and guidelines. The AMR financial benchmark tools make it easy to get an immediate snapshot of the company's performance.

Agenda Highlights Include:

- ✓ Agency money management fundamentals. Adjusted Gross Income plus key benchmarks and performance targets.
- ✓ What is critical about understanding the strategic financial benchmarks and how do they simplify accounting reports?
- ✓ Do you really want to understand your financial statements? You don't need to be an accountant to use the AMR management dashboard.
- ✓ What do you need to know about

agency valuation? Do you know what are the criteria that get you the highest price?

- ✓ Have you ever considered giving your agency to you employees and walking away?
- ✓ What are the keys to staying profitable for a long time and becoming your own cash machine?
- ✓ What do you do when you lose a key client?

✓ Do you know how much of your AGI\$ you should spend on payroll and overhead, and how much profit you should earn?

- ✓ What about time sheets, billable time and value pricing?
- ✓ What is the process you go through to hire the best of the best at a price you can afford?
- ✓ Just how much time do you spend working on your business instead of in it?

When you enroll in the management roundtable you will participate in discussions of every topic on the agenda. This is not a lecture, but an interactive learning event so you can put everything you learn into action immediately. That's one of the great reasons to bring your financial manager with you.

The management roundtable will teach you how to develop financial strategies and how to use simple benchmarks to move into greater profits and financial freedom.

The format of the two day program is presentation and discussion of all topics. Attendees participate in all areas of the agenda.

Who Should Attend?

Agency owners or principals and financial managers of small companies that want to move up to the next level and learn how to turn their companies into cash machines.

Tuition: \$995 for the first attendee, \$895 for each additional attendee

Sessions: 8:00 a.m. to 4:00 p.m. on Thursday and 8:30 a.m. to 3:00 p.m. on Friday.

Travel & Accommodations: Transportation, hotel costs, are not included in the tuition fee.

Meals: Join us for Continental Breakfast and lunch both days.

THURSDAY, DAY ONE - 8:00 a.m. to 4:00 p.m.

Learn how to build a new strategic financial strategies that increase the profitability of your agency. This is the beginning!

AMR Money Management - We start with primary benchmarks for your dashboard. New definitions for Adjusted Gross Income AGI\$, Payroll/Benefits, Overhead, Other Income and EBITDA.

Financial Statements that Make Sense - AMR's suggested Chart of Accounts, Income Statement and Balance Sheet formats.

The Revenue Streams - We will discuss fees/retainers, billing for time (do you still do this?), mark-ups and commissions .

Source Documents - What are they? Why you can't get along without them. Time records purchase orders, and estimates versus authorizations. What about those change orders?

Six Points for Better Financial Management - Balance the client base, control costs, profit and sales techniques, consistent source documents, a better invoicing policy and financial software.

When you understand the AMR process of financial management, and use them, you can have a stronger company with a solid financial base and the foundation to grow and keep growing.

FRIDAY, DAY TWO - 8:30 a.m. to 3:00 p.m.

The Numbers: They can be very simple to understand - Computing cost accounted hourly rates (for internal purposes); billable employee hours - how many?; the NEW metric - full time equivalents (FTE) and profitability; value prices and performance; pricing - who decides what is billable and what is not? Forecasting and setting objectives.

Management Financial Dashboards - Developing the metrics; AMR's Agency Report Card and AMR's Magic Spreadsheet

Compensation - Salaries and Benefits for owners and staff. Salary Survey.

Company Valuation - The determining factors; strengths and weaknesses of a merger; selling to employees; selling to an outsider.

Open Discussion - This is an opportunity to get additional clarity on some of the topics we have discussed, or to explore other ideas, such as time management, client changes to the project, estimate/ authorization process, job/client profitability, and more. Ask us.

Join us on March 22-23 in beautiful Scottsdale.
You will learn how to make your agency more profitable and turn it into
a cash machine that will fund the rest of your life.

ACCOMMODATIONS

Meeting Hotel: Scottsdale Marriott at McDowell Mountains

AMR has had the Marriott set aside sleeping rooms for management roundtable attendees. The room rate is \$197, plus taxes for Wednesday and Thursday nights. If you choose to arrive before Wednesday, or stay Friday night, the hotel will honor the rate if they have rooms available.

Scottsdale Marriott at McDowell Mountains
16770 North Perimeter Drive
Scottsdale, AZ 85260

Reservations: Call 1.480.502.3836 You must identify yourself as an attendee at the Financial Firepower Management Roundtable hosted by Agency Management Roundtable.

Meals: Continental breakfast in the meeting room and lunch on the patio both days. You are on your own for dinner.

Meeting Tuition Refund Policy: The fee covers the AMR meeting and all materials. Cancellations received before March 9, 2012 will be refunded in full, less \$50 handling/processing fee. You may substitute another attendee if the original attendee cannot attend. Cancellations received after March 9 are not refundable, but will be credited toward any future AMR meeting, products or services within one year from the date of this AMR meeting.

THE FACULTY



Dave Wood is the founder and principal of Agency Management Roundtable, started in 1994. He is a former advertising agency owner of 25 years. His agency specialized in developing marketing programs for clients in B2B and B2C categories.

He holds degrees in Economics, Marketing, and Business Organization and Finance.

For many years, he has written MarketWise, a newsletter for owners of small marketing communications agencies. He has also contributed four agency operations and management manuals: The Agency User's Manual, The Master Planning Process, The AMR Policy and Benefits Workbook, and How Marketing Makes the Advertising Work.

In 1996 Dave formed the first AMR Network, a group of like-minded agencies that wanted to collaborate on agency best business practices, and to learn how to operate a more successful business. Today, AMR has five full networks that meet semi-annually. You can find more information about AMR Networks on the AMR web site, www.agencyroundtable.com/networks

REGISTRATION FORM

FINANCIAL FIREPOWER - MANAGEMENT ROUNDTABLE

March 22-23, 2012

PLEASE SCAN/EMAIL YOUR COMPLETED FORM TO DAVE@AGENCYROUNDTABLE.COM

Attendee Name 1: _____

Attendee Name 2: _____

Agency: _____

Address: _____

City: _____ State _____ ZIP _____

Phone: _____ Fax: _____

URL: _____

Email Attendee #1: _____

Email Attendee #2: _____

REGISTER NOW. SEATING IS LIMITED			
	Number	Tuition per attendee	Total Tuition
First Attendee	1	\$ 995 each	\$ 995.00
Additional Attendees		\$ 895 each	
TOTAL TUITION			\$

My check is enclosed _____ Please charge to my: _____ VISA _____ MasterCard _____ American Express

Make checks payable to Agency Management Roundtable LLC (Fed ID# 68-0607877)

CC Acct # _____ Expires _____

Name on credit card: _____

Billing Address: _____

City: _____ State _____ ZIP _____

Reservations should be sent to Agency Management Roundtable at: FAX: 623-266-8982 Phone: 623-266-8981

Email: dave@agencyroundtable.com

Agency Management Roundtable LLC - 16841 W Villagio Drive, Surprise, AZ 85387

HOTEL ACCOMMODATIONS

The Marriott at McDowell Mountains
 16700 North Perimeter Drive
 Scottsdale, AZ 85260
 Hotel Reservations: 480.502.3836
 When making reservations tell them you are
 attending the
FINANCIAL FIREPOWER WORKSHOP



16841 W Villagio Drive
 Surprise, Arizona 85387

Our 17th year helping small agencies reach the next level!

