

Resource Guide

Driving **Success**



Allinial Global is an award-winning association of independent accounting and advisory firms who leverage collaboration, innovative resources, and the support of strategic partners and association staff to bring clients best-in-class solutions.

Through numerous in-person and virtual networking and educational events designed for future-fit firms, Allinial Global offers unparalleled opportunities for member firms and their clients to drive success.

Commerce

AG Commerce Guide

Detailed how-to guide on leveraging the expertise of fellow AG members to own the entire client relationship

Commerce Marketplace

Our grand central station for commerce, where you can search for specialized services and team up with AG members to fast-track commerce exchange

Dedicated Regional Directors

Dedicated regional directors focus on each geographic region for efficient connectivity and commerce

Doing Business In (DBI) Brochures

A digital library of customizable brochures that provide up-to-date information and statistics to advise clients doing business in other countries

Global Business Compass

Rich and engaging cultural awareness training programs that enhance your team's global business intelligence

Marketing Toolkit

Targeted marketing resources and branded templates for web content, social media, and more

Collaboration

AGConnect

Members-only portal for networking, collaboration, and 24-hour connectivity to all things AG

AG GO

A career enrichment program offering young professionals temporary assignments at other AG firms in order to foster cross-cultural experiences that accelerate both professional and personal growth

Communities

Subgroups within the AG ecosystem designed to foster collaboration, commerce, and best practices sharing based on service line (A&A, tax, advisory), industry specialization, or special interest

Cross-Border Roadshows

A platform to team up with your regional director(s) and other AG members to improve your trade and commerce capacity

Executive Working Groups

A solution-focused, tight-knit group of firm leaders who meet regularly to share ideas, collaborate, and hold each other accountable to #drivesuccess and transform their firm for the future

Global and Regional Networking Conferences

Opportunities to meet with fellow AG members both virtually and in person to build relationships, develop business, and fuel firm growth

Future-Ready Solutions

Advanced Pricing Model (APM) Cohort

A private community where you can share best practices and solve problems with other AG firms who are implementing Michelle Golden River's Advanced Pricing Model

AG Learning

Our one-stop shop Learning Management System offering in-person and virtual learning sessions on demand

AG NEXT

A comprehensive leadership development program designed to activate future leaders' potential, help them navigate the shift from doing to delegating, and accelerate leadership success

Allinial Global SmartBrief

A bi-monthly newsletter featuring curated news articles on the latest trends affecting accounting advisory professionals and their clients

Annual Member Benchmarking Survey

An annual member survey providing valuable insight on key performance indicators (KPIs) that enable data-driven decision-making and foster continuous improvement

Flex-Work Resource Center

Clear, actionable guidance on implementing flexible work environments, including a downloadable Guide to Managing a Remote or Blended Workforce

Fundamentals for Advisory

Tools and resources to grow high-performing advisory service lines with tailored support from global advisory experts Mindshop

ProfitCents

A web-based suite of financial analysis software with benchmarking and reporting tools

Strategic Partners

Member discounts and other benefits through strategic relationships with third-party vendors

Succession and M&A Learning

Strategic support for succession planning, M&A, and firm governance review

Thought Leadership

Innovative ideas, insights, and perspectives to advance the accounting profession, found in resources such as the Allinial Global blog, Moodys Tax (for Canadian members), and our ESG white paper

Vertical IQ

An industry intelligence platform that enhances your firm's ability to advise clients on new business endeavors

For more information, please contact:

[Lara Joseph, EVP, Member Services](#)

ljoseph@allinialglobal.com | +1 800 282 3680 ext. 232

allinialglobal.com

Americas

- Americas Human Resources
- Americas Client Accounting & Advisory Services (CAAS)
- Americas Operations Management

APAC

- APAC Audit & Assurance
- APAC Business Development
- APAC Connect
- APAC Corporate Finance
- APAC Firm of the Future
- APAC Human Resources
- APAC Outsourced Accounting
- APAC Tax

Canada

- Canadian Standards Interest Group
- Canadian Tax Interest Group

EMEIA

- EMEIA Audit & Assurance
- EMEIA DACH-Group
- EMEIA Indirect Tax
- EMEIA Internal Audit & Controls
- European Real Estate Practices Group
- Francophone Community

Global

- Driving Global Commerce
- Firm Transformation
- Global Cybersecurity Advisory Services
- Global Digital Assets
- Global Diversity, Equity & Inclusion
- Global Environmental, Social & Governance (ESG)
- Global Firm Tech
- Global Marketing
- Global Service Organization Controls (SOC) Reporting
- Global Women's Leadership
- International Corporate Finance
- International Global Mobility
- International Private Client Group (UHNWI)
- Transfer Pricing

LATAM

- LATAM Audit & Assurance
- LATAM Technology + CAS

US

- C-Suite Executive Support
- PCAOB Resource Group
- US Advisory
- US Audit & Assurance
- US Employee Benefit Plans
- US Family Office Services
- US Financial Institutions
- US HR Consulting
- US International Tax Roundtable
- US Marketing
- US State and Local Taxation Issues (SALT)
- US Tax
- US Third Party Plan Administrator (TPA)

Private

For more information, please contact:
Natasha Schamberger, CPA
Regional Director, North America
natasha@allinialglobal.com | +1 470 567 4594

- \$10M - \$30M Executive Working Group
- \$30M - \$50M Executive Working Group
- < \$10M Executive Working Group
- > \$50M Executive Working Group
- Advanced Pricing Methods (APM) Cohort
- Americas Chief Financial Officer

Rev up your commerce engines with
the Driving Commerce Marketplace on

AG  **CONNECT!**

To maximize your referrals, expand service offerings for clients, or search for talent-sharing opportunities, be sure to

- 1 Submit a commerce compass for your firm's specialized services
- 2 Search for fellow Allinial Global members with areas of expertise that complement your goals
- 3 Reach out to your regional directors for additional assistance

Learn more at commerce.allinialglobal.com

We look forward to *#drivingsuccess* with you!

Allinial
GLOBAL®