



AG | AdvantEdge



Overview

AG AdvantEdge is a small firm alliance dedicated to fostering the growth and prosperity of independent accounting and consulting firms. As a division of Allinial Global, the world's fifth largest global accounting association, AG AdvantEdge provides a wealth of tailored tools and resources that help small to mid-size firms scale up their operations and compete more effectively upstream.

By connecting our members to peers of a similar size and to a worldwide community of larger firms, we empower small firms to provide the best solutions for complex client needs—without sacrificing their independence or breaking the budget. With AG AdvantEdge, there's no location too far, no topic too obscure, and no question too complex to be answered by the expertise of our members and the breadth of our technical resources.

Our Vision

The vision of AG AdvantEdge is to cultivate a best-in-class peer group where small, independent firms can access tailored resources, share best practices, and exchange technical expertise to better serve their clients while supporting each other's growth and profitability.

Our Mission

Our mission is to foster the continuous improvement of small to mid-size firms by providing technical tools, learning and development resources, and opportunities for networking and knowledge-sharing that help our members grow, compete, and thrive.

Our Resources

AG AdvantEdge provides its members with a comprehensive suite of resources designed specifically for independent accounting and consulting firms. Below is a sampling of the most popular tools and resources available to our membership.

AGTV

AGTV is the go-to spot for all things Allinial Global. With quick, easy-to-understand “how to” video tutorials, it's a perfect starting point to learn about all the tools and resources available to Allinial Global members.



Ernst & Young Portal

Your Allinial Global membership includes free access to the EY Client Portal, a reference library of A&A and tax information, tools, resources, and publications designed to help you work more productively and better serve your clients.



Arraydian

This extensive worldwide database puts a world of accounting expertise at your fingertips, allowing you to search by location, industry expertise, and particular service area to find the best possible solutions for your clients.



Expertise Exchange Portal

Access the best and brightest within our membership to get answers to specific, client-driven questions that may require a more involved answer or billable time—without the hassle of setting up a new client for billing.



Communities of Practice

We offer over 30 member-led communities that meet both virtually and in person throughout the year so you can collaborate with peers to win new business or grow specific niche or practice areas.



First Research

Enjoy complimentary access to First Research's virtual library of industry intelligence tools, including call prep sheets and state, province, and industry profiles that help you save time and position yourself as a trusted advisor.



Dedicated Market Directors

Our strategic model features an innovative market director concept, with a full-time regional director dedicated to each geographic region to facilitate efficient connectivity and commerce among regional firms and the wider Allinial Global community.



Gallup Q12

Need a better way to measure and manage employee engagement? Use the Gallup Q12 metric to streamline the employee survey process and get straight to the insights that will help you accelerate organizational performance and boost your bottom line.



Doing Business In' Brochures

Perfect for clients who are pursuing cross-border engagements or expanding their business internationally, our digital library of customizable DBI brochures provides up-to-date information and statistics for over 190 countries throughout the world.



KnowledgeConnect

KnowledgeConnect is an online knowledge-sharing forum that connects you with fellow Allinial Global members so you can ask and answer questions, exchange resources, and interact with various niche and peer communities.





Leadership Progression Program

Designed specifically for our members and coordinated entirely in-house, our comprehensive Leadership Progression Program addresses six different levels of management training through a personalized, small-group approach that develops sustainable next-gen leadership step by step.

Pulse Performance Development

Ready to revolutionize your annual review process? Our exclusive Pulse Performance Development program simplifies annual reviews and reduces time-consuming paperwork so you can focus on more relevant strengths-based coaching and just-in-time feedback.

Marketing Tool Kit

Save time and show clients how they benefit from your membership to Allinial Global with our library of turnkey marketing resources and templates, including branded web and social media content, video promotions, print ads, letterhead, and more.

RETAIN

Our RETAIN survey tool makes it easy to get feedback from staff in strategies categories like leadership, culture, and staff development so you can identify underlying issues and address them to improve communication, performance, and retention.

ProfitCents

Your Allinial Global membership provides free access to Sageworks ProfitCents, a web-based suite of financial analysis software that includes a variety of benchmarking and reporting tools you can use to help clients meet their goals.

Secondments

Visit the human resources section of our website to browse requests for staff exchanges and opportunities for secondments available through fellow Allinial Global firms, or add your own job postings where our global community can see them.

Prolaera Learning Management System

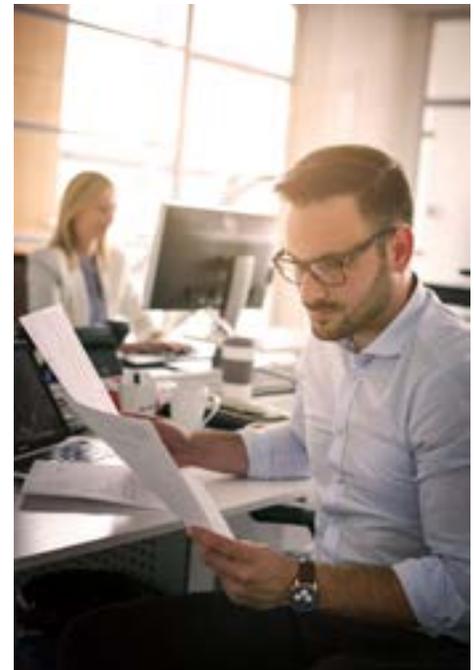
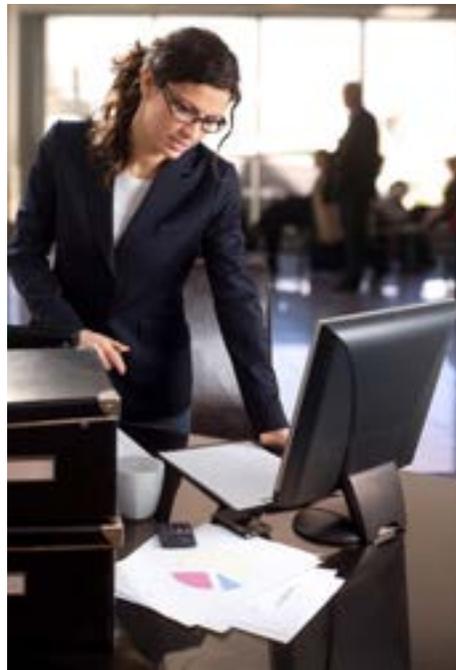
Created specifically for accounting firms, Prolaera provides tools and learning opportunities that establish a growth mindset in your firm. Its intuitive modern design supports mobile learning and features visual dashboards that make it easy to access courses and track CPE.

Strategic Relationships & Discounts

Allinial Global maintains a variety of alliances and strategic relationships on behalf of our member firms. See our website to find out how to claim significant discounts on products and services available through our strategic partners.

Services Offered

Our member firms offer a broad range of service solutions to clients of all sizes both locally and globally, so they are well-equipped to help you achieve your objectives and fulfill your clients' complex tax, assurance, and business consulting needs. Below is a sampling of professional services provided by our member firms.



Audit and Assurance

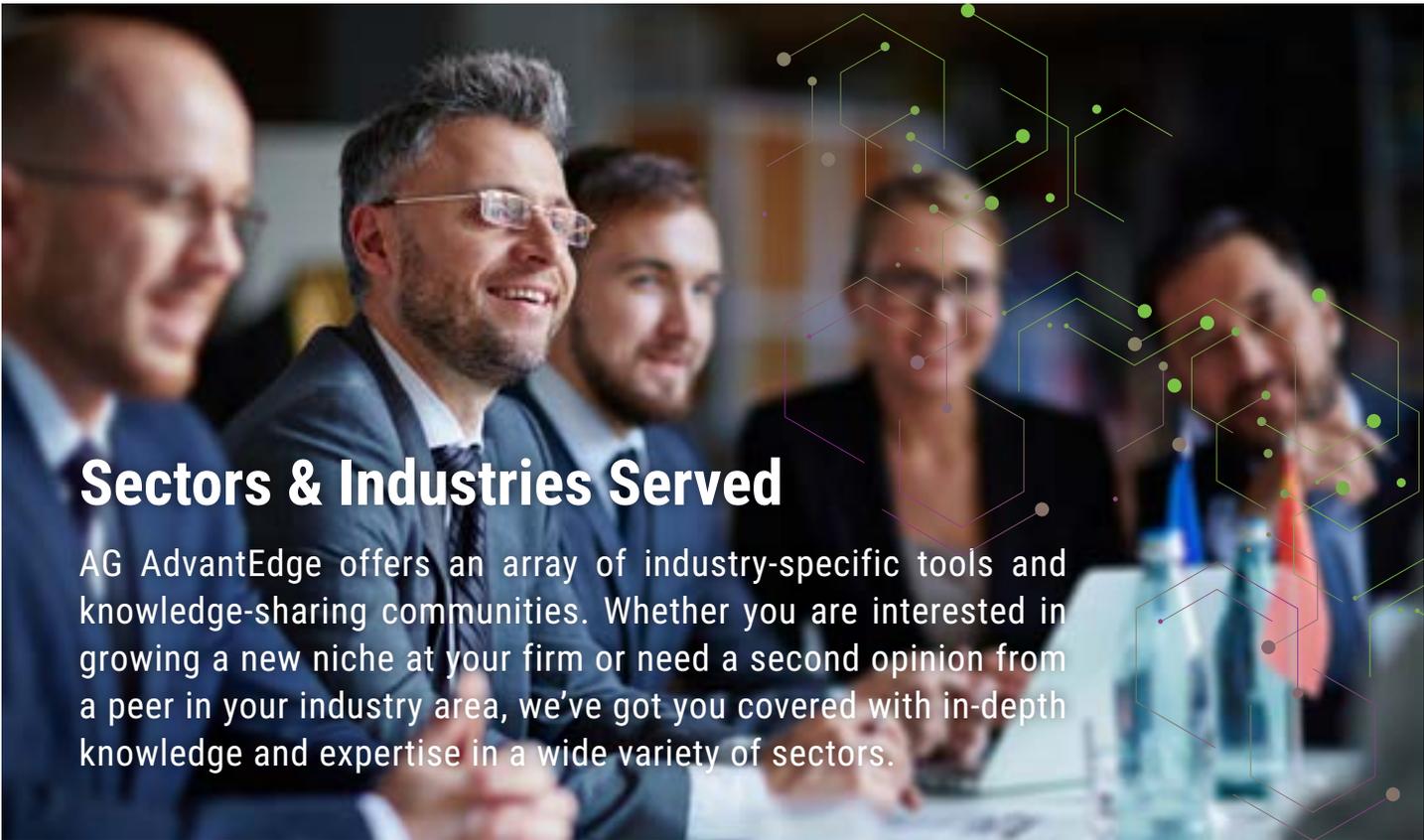
- Employee Benefit Plans
- Public Sector Accounting
- Revenue Recognition
- Service Organization Control Reporting

Consulting

- Business Valuation/Litigation Support
- Corporate Finance
- Fraud & Forensic Services
- HR Consulting
- Risk Advisory Services
- Technology Consulting
- Wealth Management

Tax

- International Tax
- R&E Tax Credits
- State and Local Taxation
- Transfer Pricing

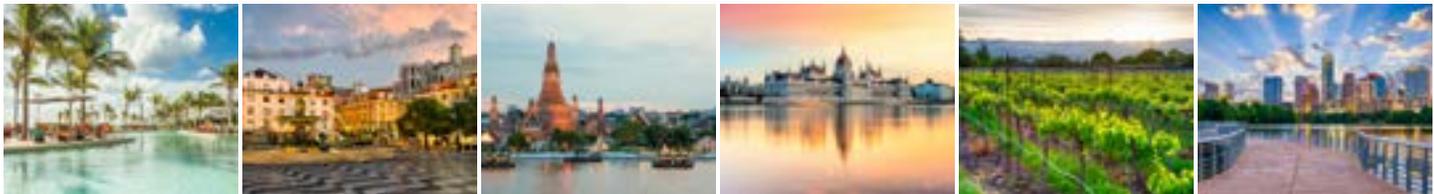


Sectors & Industries Served

AG AdvantEdge offers an array of industry-specific tools and knowledge-sharing communities. Whether you are interested in growing a new niche at your firm or need a second opinion from a peer in your industry area, we've got you covered with in-depth knowledge and expertise in a wide variety of sectors.

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|----------------------------|------------------------------------|-----------------------------|
| Agribusiness | High Tech/Biotech | Not-for-Profit |
| Construction | Hospitality | Oil & Gas/Natural Resources |
| Dental Services | Insurance | Public Companies |
| Family Business Consulting | International Business Development | Real Estate Development |
| Financial Institutions | Manufacturing & Distribution | Sports & Entertainment |
| Governmental/Public Sector | | Wealth Management |
| Healthcare | | |

Our 2019 Allinial Global Conferences



Latin America Regional Conference
 Andaz Mayakoba Playa del Carmen, MX
 February 24–26, 2019

EMEIA Regional Conference
 InterContinental Lisbon, Portugal
 June 16–18, 2019

Asia Pacific Regional Conference
 The Peninsula Bangkok, Thailand
 April 28–30, 2019

International Forum
 Budapest, Hungary
 October 20–23, 2019

Executive Team Conference
 The Meritage Resort & Spa in Napa, CA
 May 19–22, 2019

Summit
 Fairmont Austin Hotel Austin, TX
 November 3–6, 2019

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