

**ABRAMS LITTLE-GILL LOBERFELD PC**  
**RETREAT FACILITATION AND STRATEGIC PLANNING SERVICES**

*Real Benefits...Value...Results*

In the best sense, the Annual Firm Retreat represents an opportunity to review and reassess successes and failures, focus on the future, set reachable, measurable, manageable goals, and develop and implement an Action Plan for accomplishment. Our Retreat Facilitation and Strategic Planning Services are designed to deliver benefits, value and results.

**REAL BENEFITS**

*Quality, affordable services...*

Our goal is to provide CPA Firms with high quality Retreat Facilitation and Strategic Planning Services at an affordable cost.

*Focus on real day-to-day challenges...*

We understand and are connected to rather than removed from the day-to-day challenges.

*Tailored strategies designed to work exclusively for you...*

While all CPA firms have much in common, smaller and mid-sized Firms often face challenges that differ from their larger service counterparts. We tailor strategies designed to work exclusively for Firms, independent of size.

*Responsive, ongoing, follow-up services to help you stay on track...*

We keep the momentum going to ensure staying focused on taking action.

**VALUE ...RESULTS**

As Managing Partner of a mid-sized CPA and Business Advisory firm, Ron Loberfeld, CPA understands the day-to-day challenges we face because he lives with them each day. Ron has successfully facilitated engagements for other CPA firms, some of whom continue to work with him on an ongoing basis.

## **OUR RETREAT SERVICES**

### *Pre-Retreat Phase*

- ❖ Meet or conference with Ron to determine preliminary Retreat goals and objectives.
- ❖ Confidential on-site interview conducted with each participant prior to the Retreat to identify common concerns, priority issues and opportunities.
- ❖ Work with Firm to develop the Agenda based on each participant's contribution.

### *Retreat Facilitation Phase*

- ❖ Facilitate the Retreat over a one or two day period, with the purpose of getting all participants on the same page, following the Agenda.
- ❖ Help to accomplish the Firm's Retreat objectives and develop the Action Plan.

### *Post Retreat Phase*

- ❖ Available on an "as needed" basis to assist with Action Plan implementation, strategic planning and advisory services.

### *Outside of Retreat Services...*

Ron is also available as a facilitator for any specific Strategic Planning engagement.

To inquire about our Retreat Facilitation and Strategic Planning Services, please call Ron Loberfeld directly at 617-383-0618 or email [ronl@all-cpas.com](mailto:ronl@all-cpas.com).