

(Sponsoring Firm) and Appointment University (AU): Elevating CPAs as Trusted Advisors

CPAs face a critical challenge: growing practices and strengthening client relationships in a competitive market without resorting to salesy tactics that undermine their trusted advisor role. Appointment University (AU), offered through (Sponsor Firm Name) Teammates platform, solves this by equipping CPAs with the 15-Second Approach—a unique framework that transforms prospecting into authentic, service-oriented conversations. Sponsored at no cost, AU fosters a collaborative partnership that enhances your practice while preserving your professional identity.



How AU Delivers Authentic Engagement

AU's unique approach combines the activity-based "Goldberg" model with the revolutionary 15-Second Approach to eliminate contact reluctance—the fear of initiating conversations. The Goldberg model gets CPAs "in the pool" by confronting anxiety through action, not scripts, ensuring even missteps build confidence. The 15-Second Approach makes this jump quick, like pulling off a Band-Aid: CPAs initiate trust-based conversations in just 15 seconds, resonating with clients' needs and inviting dialogue. This rapid, authentic philosophy ensures every interaction feels personal, enabling outreach that feels like advising, not selling. In the live webinar, you'll craft a tailored approach to connect with small business and non-profit clients, leveraging storytelling to make conversations memorable.

Key Benefits for Your Practice

- **Resonate with Clients:** The 15-Second Approach fosters instant trust, making clients feel heard amid 6,000–10,000 daily marketing messages.
- **Overcome Contact Anxiety:** Face prospecting fears through repeatable actions, enabling confident outreach to new and existing clients.
- **Authentic Conversations:** Post-Goldberg training (a few days), share opportunities with enthusiasm, preserving your trusted advisor status.
- **Client-Specific Training:** AU's video and live webinar equip you to engage small business and non-profit clients, strengthening relationships and attracting referrals.
- **Collaborative Partnership:** Partnering with [Sponsoring Firm] enhances AU's training and builds a team-based relationship, reinforcing your community role.

Why AU Stands Out

Unlike traditional sales training, where 87% of content is forgotten within months (Xerox study), AU delivers lasting results by encouraging action. As John Witkowski, President and CEO of the Independent Bankers Association of NYS, says, “The program builds a culture that allows free-flowing conversation and is worth its weight in gold to professionals, but more importantly to their clients.”

Real-World Impact

- Globe Life: 19 agents saw a 200% sales spike using AU principles.
- Amit Trivedi: Climbed from #85 to #2 in financial planning at a Fortune 100 agency.
- View testimonials [HERE \(7 minutes\)](#).

Next Steps: Please get back to the agent that shared this opportunity with you. Or reach out to Gary Hoy (Founder of Teammates) with questions about the AU training program, or Teammates, and how it can help your practice grow—you can reach Gary (gary@teammates1.org) to ask questions or grab a quick call. Also look for the Teammates webinar registration button on the [Teammates Home Page](#) to join an overview specifically designed for CPA's. Start adding value to your practice and community today!

I am a huge fan of Gary Hoy. Gary's excitement and enthusiasm make him stand out as a trainer and motivator. Most importantly, he operates from the heart with true passion! Gary played a key role in helping many of my struggling people to take their careers to the next level. The agency's activity and production increased to the point that we had a record month in January!



Elias Boles

State General Agent, National Income Life Co. (New York)

My company model requires me to walk into a business “cold” and meet the owner. This caused major anxiety as it would for anyone. Initially, merchants would say no or tell me they didn’t have time for me. I would leave very frustrated and take the rest of the day off feeling incompetent, even wondering if I could make things work. After a few weeks, Gary hit on some key notes, and I began using his 15-second approach and things immediately began to change. Fast forward a couple of months, now I can walk into any building, meet any person, and explain what I have to offer. It is actually fun now! To be able to connect with a business owner and share your business with passion is extremely rewarding. The sky is the limit for me and I’m just getting started. Do yourself a favor and jump into a bootcamp, it can change your life.

John Reczkowski

Owner, Infusion Business Solutions (New York / New Jersey)

Appointment University is a lifeline for agents - both new and struggling - to make sense of the emotional aspects of prospecting. The impact in my organization has been eye-opening in developing new activity and excitement. My initial exposure was watching a short video from a Managing Partner of a Fortune 100 Company and several participants who had seen a significant jump in production. Then, after 10 minutes with Gary, I had two questions - how much and when can we start.

I encourage you to carve out some time with Gary - you will then likely ask the same two questions. This is a game-changer for any salesforce...the principles taught help agents identify and then overcome their fears to prospect...

Richard Schega

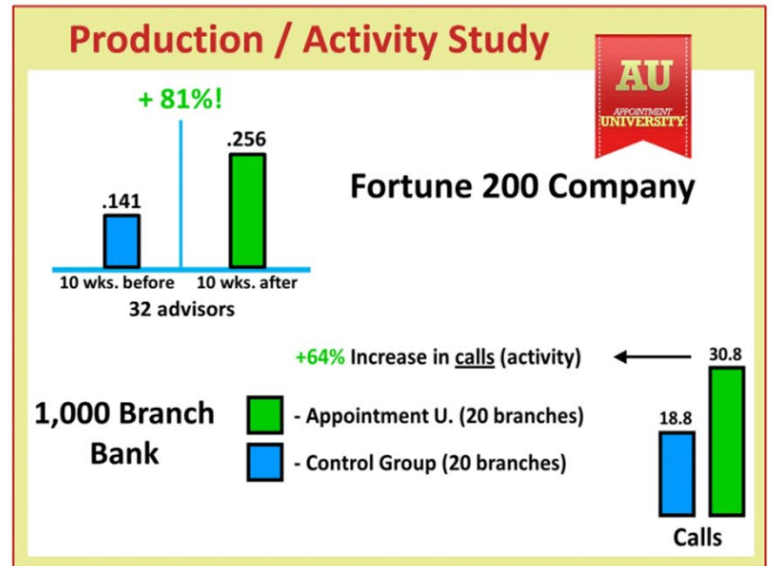
General Agent - Magnolia Wealth (Fortune 100)

"Having run my own business for the past 20 years I am keenly aware of the importance of client acquisition. Thank you for putting a finger on the emotions which continually seem to invade my business...your honest and straightforward Bootcamp was refreshing and has reinforced the importance of "Getting in the pool, and staying in the pool." I am a self-help enthusiast and this material is the best I have ever seen...

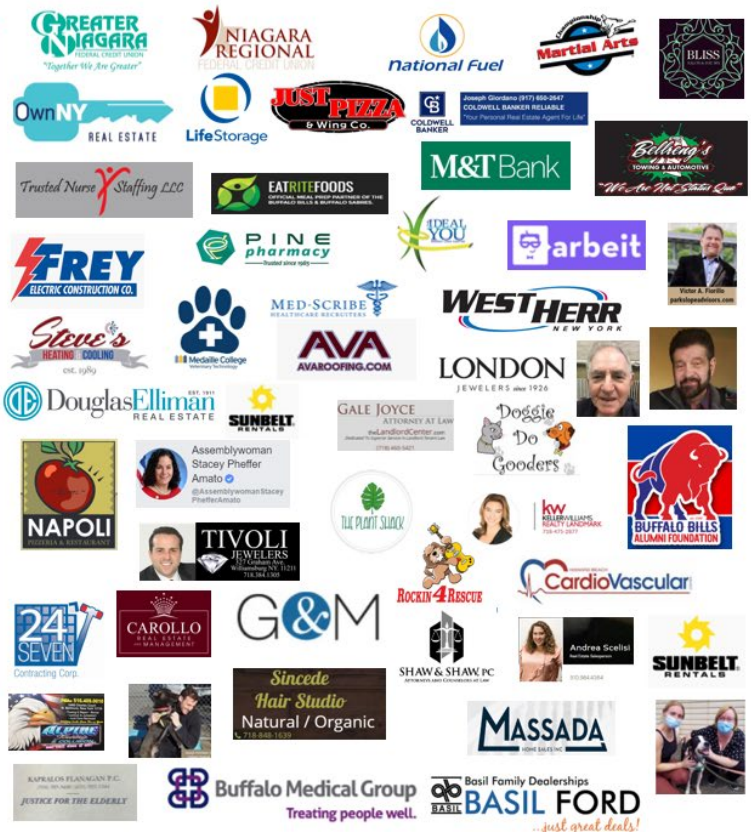


Thomas Vicanti

Partner, BICA Solutions



130+ Covid era businesses donated \$250-\$2,500 – why? Goodwill branding. Ross Cellino, gamed the social media algorithm to benefit NY shelters (via a small local 28K Facebook page)



"The program builds a culture that allows free flowing conversation and is worth its weight in gold to banking institutions, but more importantly to their customers. The tracking program is so simple you'll almost chuckle - but the impact will be powerful and immediate. Do yourself a favor and check out this program."



John Witkowski

President and CEO, Independent Bankers Association of NYS

"I have seen firsthand that Gary Hoy's appointment setting approach is a game-changer. Having been in sales management for 35 years, I know that this amazing "15-second Approach," can double sales results in short order. Gary's program should be the first of any training you provide your sales team."



Larry Post

Former Group Vice President of New England for Ameriprise Financial (New England)

"The approach has been a huge asset in helping us develop and train existing and new advisors. Gary offers a unique approach which helps our advisors make sense of (and overcome) the anxiety which surrounds prospecting. The simple 15-Second Approach philosophy changes everything - fantastic!"



Louis Nuchereneno

Executive VP at Equitable Advisors-East Region

"Meeting Gary is one of the best divine appointments in my career of 22 years. His training is simple and concise. Just take action, get busy and get results. This is the best training I have attended that gives results - in the last two weeks I have closed on 3 new contracts! It takes anxiety away and recalibrates my mind to focus on what I can control. Simply awesome!!!"



Agnes Oh

Financial Services Director - Prudential Assurance (Singapore)