



# MSI Update

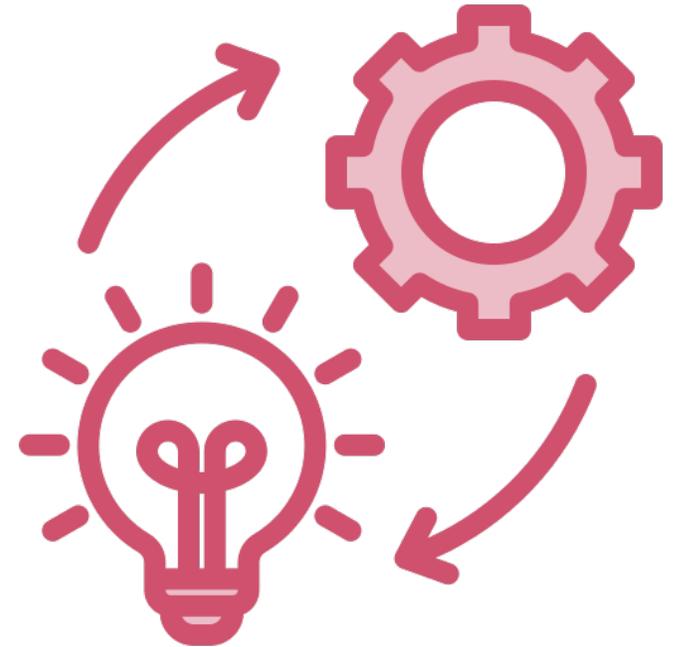
Andrew Leck, MSI CEO

*Independent legal & accounting firms*

# Focus in 2024

## Continuing our strategy implementation

- Expanding MSI's global presence
- Member engagement
- Member resources



# MSI by numbers

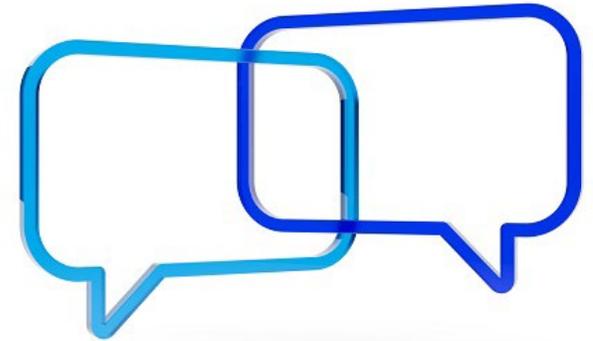
**92%** of firms expect fee income to increase or remain stable

**72%** of member firms have been with MSI for over 5 years

**100%** of firms are proud to be a member of MSI

**17,000 + professionals**  
worldwide across 251 firms

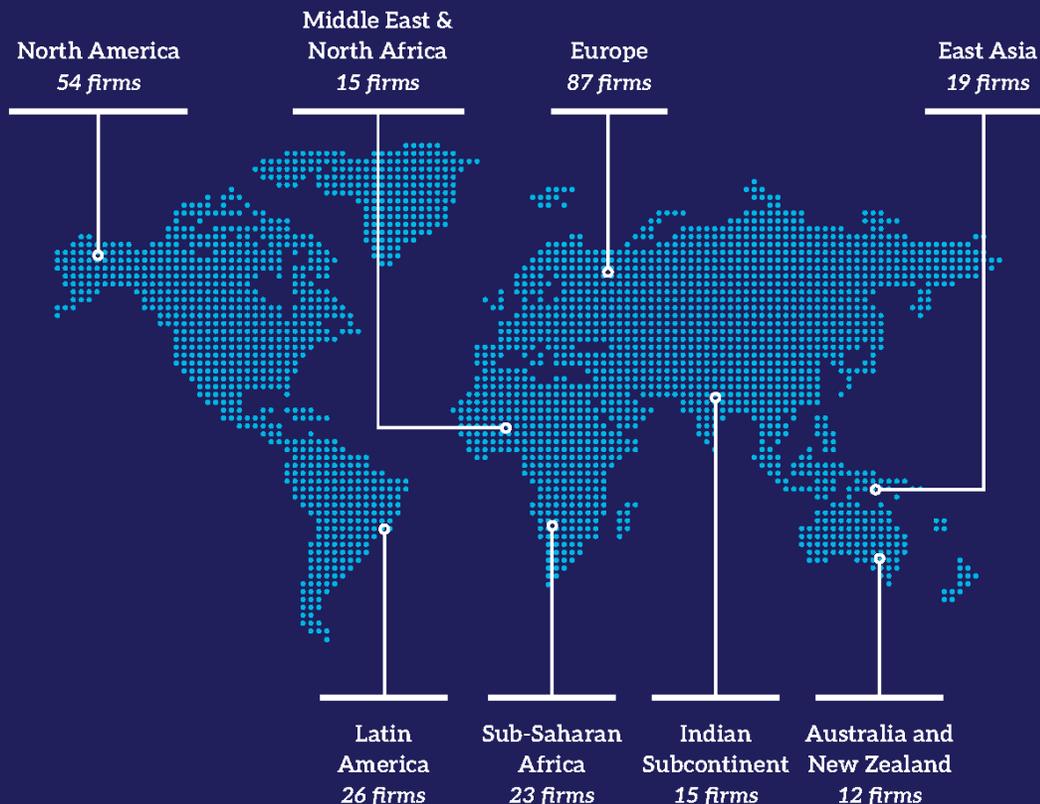
**US\$1.87bn fee income**  
up by 5.78 % from 2022





# MSI Global Alliance at a glance

Independent legal & accounting firms



### Quality

We are committed to high standards and only recruit and retain high quality members



### Exclusivity

We appoint only one law and accounting firm in each jurisdiction



### Multi-disciplinary

Our unique membership structure has a 50/50 split between legal and accounting firms



### Independence

Our member firms retain their independence while gaining global reach



Did you know?

You can find this infographic in [Member Resources online!](#)



100+

Countries



250+

Member firms



\$1.87bn

fee income of US\$



17,000+

Total member firm personnel worldwide

# Expanding MSI's presence

## Recruit and retain high quality firms of the right size and capability in key economic areas

- 22 new member firms recruited during 2023
- Start of 2024: 5 new member firms added
- Leads and introductions to firms you trust: Member2Member
- Ensuring our key sales messages resonate with prospects
- Making sure new member firms add value to the MSI community



# New members in 2024

- **Bauman Associates**, Eau Claire, Wisconsin, USA (Acc)
- **Carsen Fox Legal**, Auckland, New Zealand (Law)
- **CityLinkers Group**, Hong Kong (Acc)
- **LLGV Inc.**, Johannesburg, South Africa (Law)
- **Phillip & Elnest (PE) Partners**, Kampala, Uganda (Acc)



# Member engagement

## International, regional, and local meetings and use of the latest technology to support engagement

- In person and online meetings to enable business development and collaboration
- Local meetings
- MSI Expert Webinars on topical issues showcasing the experts and member firms
- Increased informal member collaboration



# Engagement & Visibility

## Actions and resources to strengthen and enhance your profile

### Ensure your personal profile is up to date

- Simply update your profile via the MSI Members' area / MemberLink
- List your specialisms and areas of expertise/ Add a photo

### Update your country's Doing Business In Guide

- Request the template from the MSI Secretariat to create and/ or update your guide

### Submit your news and case studies

- Featured on your firm profile and included in the newsletter MSI Focus

### Revised AMQ

- Deep dive into referral activity



# Member resources



Contact us My account

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[Expertise](#)
[Worldwide Directory](#)
[Membership](#)
[Events](#)
[News & Knowledge](#)

[Home](#) → [Memberlink homepage](#) → [Member resources](#)

## Member resources

Browse our range of member resources that you can use to support your business development activities and to demonstrate your international capabilities to clients and team members.



### MSI by numbers

- 240+ Member firms
- 15,300+ Professionals globally
- US\$1.76 billion Member fee income combined
- 100+ Countries
- 50% Split Legal & Accounting
- Top 10 International ranking

#### Talking to your clients about MSI

FAQs designed to provide MSI member firms with a choice of answers to the most common...

[Business Development Resource](#)

#### MSI Global Alliance Corporate Brochure

Explore our corporate brochure to find out more about MSI Global Alliance.

[Corporate brochure](#)

#### MSI video: Gain competitive advantage

Our independent legal and accounting member firms provide access to a wide network of...

[Video](#)

#### Why use an MSI member firm?

[Business Development Resource](#)

#### Advisors2Go - Mobile directory app

Download the MSI Advisors2Go directory app from iTunes or Google Play to find an MSI member firm...

[Mobile app](#)

#### MSI Global Alliance - Code of Conduct

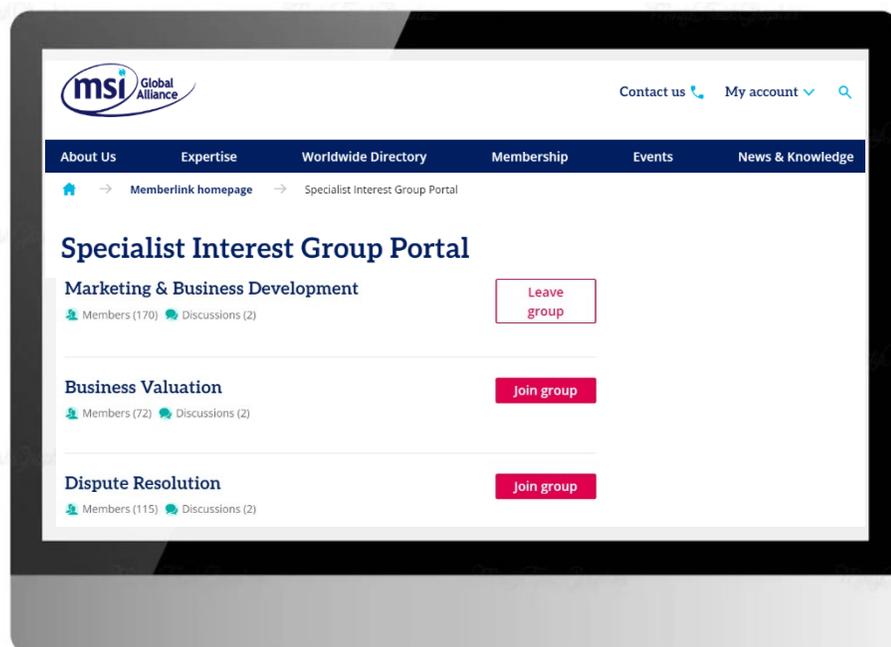
MSI members follow common set of guidelines when doing business together.

[Code of Conduct](#)



# International SIG Festival: 17 – 20 June

- Showcasing and elevating specialties of MSI member firms
- **27** meetings sessions, **18** different Specialist Interest Groups over **4** days
- **Share knowledge and insights**
- **Highlight your expertise** and raise your profile
- **Connect** and get to know your colleagues



**Check out the MSI Specialist Interest Group Portal and join the discussions!**

# Advisors2Go: New app coming soon!



## Updated and improved directory app

- Refreshed look, improved functionality:
  - Cleaner and updated design*
  - Member only-access to safeguard your data*
  - TOP 5 contacts*
  - Improved search*
  - US state search*
- Find an MSI member on the go
- Works offline, no internet required
- Available for Apple and Android devices

# MSI Code of Conduct

**Common set of guidelines when doing business together**

## **Preferred client status**

Member firms must ensure that all business referred by another member is prioritised in order to maintain and enhance the good names of all firms involved.

## **Expected response times**

Members must acknowledge any requests received within 24 hours, with an estimate of when the member or client can expect to receive a full response.

## **Chargeable vs non-chargeable**

Straight forward advice with less than 30 min spent should normally be free. However, use your judgement and provide a fee quote as required.

**Code of Conduct is available on [MemberLink!](#)**

# Cyber Safety

## Verify with MSI

When you receive **requests** from 'MSI' or another 'member firm' **asking for sensitive information or actions that seem unusual, be sceptical! Verify the authenticity** of these requests with MSI. Dont respond to the email, just give us a call!

## Beware of impersonations

**Impersonation scams are frequently used** by cybercriminals to gain access to your personal and professional information. **Be suspicious of emails or phone calls** where individuals claim to be from MSI but ask for sensitive information or money!

# MSI MONTH...is back!

**M**aking **S**eptember **I**nspiring: 1 - 30 September 2024

- **Celebrate MSI membership:** Celebrating the value of being part of a global community and inspiring emerging leaders
- **Create awareness:** Increasing awareness about MSI within member firms to get more people to 'think MSI' and leverage the opportunities that brings
- **Showcase expertise:** Showcasing member firms' capabilities and expertise to other members as well as clients and prospects

**More information soon!**

# MSI Conferences in 2024 & 2025

## International Conference 2024

27 – 30 October 2024  
Amsterdam, Netherlands



## EMEA Regional Conference 2025

May 2025 (*exact dates to be confirmed*)  
Vienna, Austria

