



KCG  ***KOLTIN CONSULTING GROUP***

EXECUTIVE SEARCH

RETAINED EXECUTIVE SEARCH FIRM SPECIALIZING IN THE PROFESSIONAL AND FINANCIAL SERVICES INDUSTRIES



OPPORTUNITIES

Koltin Consulting Group's Retained Executive Search practice is a boutique practice specializing in the Professional and Financial Services industries. We operate on a national basis, conducting searches for:

- ▶ *Partners and leaders for Professional Services firms*
- ▶ *Leaders for Financial Services organizations*
- ▶ *Finance, operations and leadership talent*

These are the executive career opportunities currently presented, exclusively, by Koltin Consulting Group. We share our senior-level positions as a means of reaching the best candidates to serve our client's needs. We invite you to review the opportunities below. Click the position title to find out more.

EAST	
<p><u>Real Estate Industry Practice Leader</u> ^{R D} <i>Boston, MA</i></p> <p><u>Transaction Services Practice Leader</u> ^{R D} <i>Cleveland, OH or Milwaukee, WI</i></p> <p><u>State & Local Tax Partner/Senior Manager</u> ^{R D} <i>Midtown, Manhattan, NYC</i></p> <p><u>Lead Real Estate Tax Partner (Regional)</u> ^R <i>Washington, D.C. Metro Area</i></p> <p><u>Tax Department Leader</u> ^{R D} <i>New York City Metro Area</i></p>	<p><u>Government Audit Practice Leader</u> ^{R D} <i>Tampa, FL</i></p> <p><u>Lead Real Estate Tax Partner (Regional)</u> ^{R D} <i>Midtown, Manhattan, NYC</i></p> <p><u>Accounting & Auditing Technical Director</u> ^D <i>Cleveland or Akron, OH</i></p> <p><u>Tax Department Leader</u> ^D <i>Providence, RI</i></p>
CENTRAL	
<p><u>Lead Real Estate Tax Partner (Regional)</u> ^R <i>Chicago, IL or Atlanta, GA</i></p>	<p><u>Client Relationship Executive</u> <i>Chicago, IL</i></p>
WEST	
<p><u>Real Estate Tax Partner</u> ^{R D} <i>San Francisco Bay Area</i></p> <p><u>Private Company Tax Partner</u> ^{R D} <i>San Francisco Bay Area</i></p>	<p><u>Corporate Tax Partner</u> ^{R D} <i>San Jose, CA</i></p>

^R Relocation assistance can be provided.

^D Senior Managers/Directors will be given consideration as Direct Admit Partner.



OPPORTUNITY SUMMARIES

Real Estate Practice Leader

Boston, MA

The Firm has a \$5M real estate client base throughout New England – including the 6th, 9th, and 11th largest clients in the region – and wants to develop a formalized Real Estate Industry Group. Transition into this established book of business within a winning Firm. Coalesce with what the Firm has in place today and be the face of the practice; market it, organize it, and take it to a new level.

Contact Jeremy Cepin at 312.662.6011 or gcepin@koltin.com.

Transaction Services Practice Leader

Cleveland, OH or Milwaukee, WI

Organize the Firm's existing Transaction Services platform into a cohesive business unit. Map the strategic vision for the Practice. Market the Firm's capabilities and experience in Transactions Services nationwide, capturing and executing due diligence for private equity and strategic investors as well as debt capital providers.

Contact Jeremy Cepin at 312.662.6011 or gcepin@koltin.com.

State & Local Tax Partner/Senior Manager

Midtown, Manhattan, NYC

The Firm's State and Local Tax specialization is superior to most Firms its size and is making a sustained investment in expanding the practice. Use your strong technical knowledge of state and local tax consulting and compliance to serve as a member of various teams operating across the Firm. You will be assigned to 1500-1600 hours of existing work as well as serve as a resource to other departments and practice areas. Be active in practice development: mentoring and training staff and identifying low hanging fruit.

Contact Sara King at 312.662.6016 or sking@koltin.com.

Lead Real Estate Tax Partner (Regional)

Washington, D.C. Metro Area

Walk into a thriving national practice – quite possibly the largest RE practice outside of the Big 4 – and an established book of business. As the lead Real Estate Tax Partner for the region, bring your tax consulting skills to the Firm's institutional client base, mentor and develop future leaders, and team with Real Estate Partners to identify and originate new tax consulting and compliance engagements.

Contact Ryan Prepelica at 312.662.6009 or rprepelica@koltin.com.

Tax Department Leader

New York City Metro Area

The Tax Department Leader for this prominent New York-based regional Firm will be one of the most important hires the Firm will make within the next ten to fifteen years. The Firm's Partners are seeking a dynamic Tax Partner skilled in all aspects of tax for closely-held businesses and their owners, providing comprehensive tax planning, consulting, and compliance services. This Partner must be a leader who will serve as a Firm-wide, high-level tax resource and a go-to tax technical expert for the Firm. S/he will enjoy the opportunity to work with high-profile middle market companies and their owners throughout the Tri-State region.

Contact Mitch Bassler at 312.662.6013 or mbassler@koltin.com.

Government Audit Practice Leader

Tampa, FL

The Tampa office's government audit practice needs a leader - both a leader of people and someone who has strong governmental auditing technical skills. Take over and lead the existing government audit practice. Clients are primarily governments and municipalities including two of the three largest municipalities in Florida. Provide staff with mentoring and training. Diversify the practice by developing new client relationships in multiple areas while providing the Tampa office with a visible leader who will be the face of the West Central Florida audit practice moving forward.

Contact Mitch Bassler at 312.662.6013 or mbassler@koltin.com.

Lead Real Estate Tax Partner (Regional)

Midtown, Manhattan, NYC

Walk into a thriving national practice – quite possibly the largest RE practice outside of the Big 4 – and an established book of business. As the lead Real Estate Tax Partner for the region, bring your tax consulting skills to the Firm's institutional client base, mentor and develop future leaders, and team with Real Estate Partners to identify and originate new tax consulting and compliance engagements.

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Accounting & Auditing Technical Director

Cleveland or Akron, OH

The Firm has a substantial appetite to high-end technical experts who will add layers of depth and expertise to the A&A department. Personify the belief that being technically smart is cool and valuable. Serve as Client Service and Audit Partner while spearheading the Firm's Quality Control efforts. Provide guidance, support, specialized knowledge and expertise to Partners, staff, and clients on financial accounting, auditing, and ethics matters. Be a Concurring Reviewer on all attest work in all industries except insurance. Keep abreast of all Accounting & Auditing standards and communicate and share your knowledge to both clients as well as the entire Firm. Inspire and motivate fellow A&A professionals to continually improve their skill sets as well the A&A department's overall capabilities.

Contact Mitch Bassler at 312.662.6013 or mbassler@koltin.com.



Tax Department Leader

Providence, RI

Assume all leadership responsibilities for a rapidly growing New England public accounting Firm's Tax Department while contributing to the strategic vision, plan execution, and expansion of the company's client base throughout New England. Provide a full range of tax planning, consulting, and compliance services for closely-held businesses and their owners, and middle-market publicly traded companies throughout New England.

Contact Mitch Bassler at 312.662.6013 or mbassler@koltin.com.

Lead Real Estate Tax Partner (Regional)

Chicago, IL or Atlanta, GA

Join a thriving national practice – quite possibly the largest RE practice outside of the Big 4 – and an established book of business. As the lead Real Estate Tax Partner for the region, bring your tax consulting skills to the Firm's institutional client base, mentor and develop future leaders, and team with Real Estate Partners to identify and originate new tax consulting and compliance engagements.

Contact Jeremy Cepin at 312.662.6011 or gcepin@koltin.com.

Client Relationship Executive

Chicago, IL

Lead the sales/business development efforts for the Chicago office of an international professional and advisory services Firm. Focus on selling professional services and related advisory work within middle market companies and Fortune 500 organizations. Interact with target accounts and existing clients to cultivate consultative and collaborative Partnerships. Move opportunities forward and improve the relationships. The Client Relationship Executive is incentivized to develop new accounts and to sell within existing accounts, without reduction in commission percentages for work sold to existing accounts.

Contact Jeremy Cepin at 312.662.6011 or gcepin@koltin.com.

Real Estate Tax Partner

San Francisco Bay Area

Take over a robust real estate tax practice – succeeding a Partner that is retiring in 18-months – within the pre-eminent accounting Firm in Northern California specializing in Ultra-High-Net-Worth Individuals and Wealthy Families. Provide a range of tax consulting and compliance services including complex transactions involving development, acquisition and disposition, investment, management, and syndication of residential and commercial properties.

Contact Sara King at 312.662.6016 or sking@koltin.com.



Corporate Tax Partner

San Jose, CA

This position will play a significant role in leading the San Jose Tax Practice. Further the Firm's existing strong presence and growth through business development efforts. Manage existing client relationships and be involved in the development of future leaders. Provide a full-range of corporate tax services including Tax Provisions, Corporate Tax Compliance & Consulting, R&D Credits, and Tax Audits.

Contact Ryan Prepelica at 312.662.6009 or rprepelica@koltin.com.

Private Company Tax Partner

San Francisco Bay Area

Facilitate Partner succession plan and continued Firm growth. Two reasons for this opening: 1) A Tax Partner with large client base is retiring next year, and 2) Tax practice growth has created need to redistribute clients amongst Partners (this is NOT a "my book of business" Firm) in order to provide consistently excellent client service, while at the same time keeping in line with the Firm's commitment to a balanced approach to client service, business development, staff mentoring and training, and life outside of work.

Contact Ryan Prepelica at 312.662.6009 or rprepelica@koltin.com.

"ONE OF THE BEST RETAINED SEARCH FIRMS IN CHICAGO."

RECENTLY COMPLETED SEARCHES

ARTICLES & RESOURCES

KCG EXECUTIVE SEARCH TEAM



Jeremy Cepin
Managing Director

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Professional Background
Koltin Consulting Group
Robert Half International
PDI Global

Industries Served
Public Accounting
Financial Consulting
Financial Services

Education
Washington State Univ.
BA, Social Sciences



Mitch Bassler
Director

312 662 6013
mbassler@koltin.com

Professional Background
Koltin Consulting Group
RSMR
MorganWorks

Industries Served
Public Accounting
Financial Consulting
Financial Services

Education
Northwestern University
BA, History



Sara King
Director

312 662 6016
sking@koltin.com

Professional Background
Koltin Consulting Group
Quick Leonard Kieffer

Industries Served
Public Accounting
Financial Consulting
Financial Services

Education
Roosevelt University
MBA



Ryan Prepelica
Director

312 662 6009
rprepelica@koltin.com

Professional Background
Koltin Consulting Group
Spencer Stuart
Navistar

Industries Served
Public Accounting
Financial Consulting
Financial Services

Education
University of Illinois
BS, Marketing



Allan Koltin, CPA
Chief Executive Officer

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abruks@koltin.com

Professional Background
Koltin Consulting Group
PDI Global
FERS

Industries Served
Public Accounting
Financial Consulting
Financial Services

Education
University of Wisconsin
BA, Accounting



Angela Bruks
Research Associate

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Professional Background
Koltin Consulting Group
Huron Consulting Group
PepsiCo

Industries Served
Public Accounting
Financial Consulting
Financial Services

Education
Northeastern Illinois
BA, Human Resources



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