



Koltin Speaks to Marcum Partner Group in Palm Beach, Florida

Allan D. Koltin, CEO of Koltin Consulting Group, spoke to the 250-plus partners and firm leaders of Marcum at their firm's annual partner meeting at the Breakers Hotel in Palm Beach, Florida.

His keynote focused on the state of the industry, as well as a discussion on common traits of 'best in class' firms.

Koltin recalled speaking at previous Marcum partner retreats in 2011, 2012 and 2015 and added the following, "It has been truly incredible to watch first-hand the amazing growth and expansion that Marcum has had over the past seven years. Your firm has essentially doubled in size and is on a run rate to be a \$500 million firm in the very near future. Marcum has emerged from a regional firm to that of a true national firm, and what is most amazing is the entrepreneurial culture that you have been able to preserve."

It should be noted that Koltin has been intimately involved in some of Marcum's expansion efforts, having assisted the firm with the following mergers:

- Margolis – Philadelphia, Pennsylvania
- Stonefield Josephson – Los Angeles and San Francisco, California
- Robert Finnegan & Lynah – Boston, Massachusetts
- Frost – Chicago, Illinois
- Lautze – San Francisco and San Jose, California
- Hennagin – Irvine, California

“One of the unique and rather transparent things that takes place at the Marcum retreat is the live polling of the partners they do on very significant topics and questions. This session is led by their CEO, Jeffrey Weiner, and addresses (what could be very sensitive) issues, such as partners’ satisfaction with the CEO and firm leadership, partner compensation, and the overall vision and strategy of the firm. I was blown away by the “over 90%” rating when the partners were polled on their overall support of the firm’s current and future direction as it related to innovation, leadership, technology, and the workforce.”

As great as the content and business meeting portion of the retreat was, the most entertaining and fun part for Allan was the firm’s after dinner entertainer, who was a ‘mentalist’. “This person not only read people’s mind, he was also able to influence their behavior and actions in a way that I didn’t think were humanly possible! I was just glad he didn’t call on me, because that could have been rather embarrassing!”

Koltin Consulting Group, Inc., is a Chicago-based consulting firm that specializes in working with professional and financial services firms in the areas of practice growth, practice management, talent representation, and mergers and acquisitions.

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