

Interviews and Speeches
Allan D. Koltin, CPA
For the period January 1, 2008 – April 15, 2016

ARTICLE/SPEECH TITLE	PUBLICATION/CONFERENCE	DATE
“The Advisory Board Names Tim Christen Winner of the ‘Hall of Fame Award’”	CPA Practice Advisor	April 8
“Trends from the CPA Profession’s Premiere Think Tank”	The Rosenberg Associates Newsletter	March 29
“Great Insights from Allan Koltin on the Value of Leadership”	Rita Keller’s Blog	March 9
“On the Phone with My Good Friend Allan Koltin”	Thoughts of the Week – Marcum	March 4
“CPA Practice Advisor Accounting Hall of Fame Inducts Koltin”	Inside Public Accounting	February 19
“Allan Koltin Selected as One of Industry’s Top 25 Thought Leaders”	CPA Practice Advisor	February 17
“Allan Koltin Inducted into Accounting Hall of Fame”	CPA Practice Advisor	February 17
“Accounting Thought Leaders Tackle Firm Challenges at Symposium”	CPA Practice Advisor	February 17
“Bruner Cox LLP Joins CLA”	Inside Public Accounting	February 4
“CliftonLarsonAllen Merges in Bruner Cox”	Accounting Today	February 3
“State of the M&A Market”	Accounting Today	February 3
Bruner Cox LLP of Canton to Merge with CliftonLarsonAllen”	Crain’s Cleveland Business	February 3
“Overheard at the Winning Is Everything Conference”	Inside Public Accounting	February 2016
“State of the M&A Market: The Deals Just Keep Coming”	Accounting Today	February 2016
“CEO Panel – Firm Leaders Share Lessons and Strategies”	Winning Is Everything 2016	January 22
“CPA Firm Heads Looking For the Right M&A Candidates”	Accounting Today – WIE Conference	January 22
“Koltin Delivers Keynote Presentation on State of the Industry”	Winning Is Everything 2016	January 21
“BDO Merges in Feeley & Driscoll”	Accounting Today	January 19
“BDO Acquires Boston Accounting Firm Feeley & Driscoll”	CPA Practice Management Advisor	January 15
“Best Practices of Successful Firms – State of the Accounting Industry Update”	Minneapolis Large Firm Leadership Roundtable	January 13
“Steinberg Advisors Joins Wipfli Accounting Network”	CPA Practice Advisor	January 6
“Milwaukee Accounting Firm Snaps up Chicago Area Shop”	Crain’s Chicago Business	January 5
“Wipfli Adds Steinberg Advisors”	Accounting Today	January 4
“Brand Building Tips for Small Firms and Sole Practitioners”	Journal of Accountancy	January 2016
“Measuring the Marketers’ Performance”	AAM Growth Strategies Newsletter	Winter 2015-2016
“Baldwin CPA Merges with Anderson Bryant Lasky & Winslow”	The Lane Report	December 18
“Industry Niche Focus Drives Wipfli Success”	Public Accounting Report	December 15
“Armanino Acquires Southern California Accounting Firm LCMT”	CPA Practice Advisor	December 13
“Merger has Added to Bober Markey Fedorovich’s NEO Growth Plan”	Crain’s Cleveland Business	November 29
“Talent Wars go From White Gloves to Boxing Gloves”	CPA Trendlines	November 29
“CPA Associates International Names Michael Parness President”	CPA Practice Advisor	November 18
“Koltin Speaks on Innovation at BDO Partners Meeting”	BDO Partners Meeting	November 17
“BDO and CEA Merge, Expanding BDO’s San Diego Presence”	Inside Public Accounting	November 17
“BDO Acquires California Accounting Firm CEA, LLP”	CPA Practice Advisor	November 13
“BDO USA Merges in CEA”	Accounting Today	November 13
“Koltin Speaks to National Life Group on State of the Profession”	National Life CPA Symposium	November 12
“Marcum Merges with Frost”	Public Accounting Report	November 10
“CLA and KFMR Enter into Merger”	Inside Public Accounting	November 9
“Marcum and Frost Agree to Merge”	Inside Public Accounting	November 9
“Accounting Firm KFMR Joins CLA”	CPA Practice Advisor	November 3
“Marcum Acquires Chicago Accounting Firm Frost Rutenberg”	CPA Practice Advisor	November 3
“Nation’s 10 th Biggest Accounting Firm Buys Pittsburgh CPA Firm”	Pittsburgh Business Times	November 2
“CLA Merges in KFMR”	Accounting Today	November 2
“Marcum Reaches into Midwest with Frost Merger”	Accounting Today	November 2
“New York Accounting Firm Buys Local CPA Firm”	Crain’s Chicago Business	November 2
“How to Win the Game of Talent”	Journal of Accountancy	October 2015
“Koltin Named One of Top 10 Consultants to Accounting Profession”	Inside Public Accounting	September 28
“BlumShapiro Selects Kask as New MP”	Inside Public Accounting	September 22
“BlumShapiro Picks New Managing Partner”	Accounting Today	September 21
“Citrin Cooperman Merges with Regardi Brooks & Lewis”	Public Accounting Report	September 15
“Koltin Addresses Wealth Management and Financial Planning as a Growth Service for CPA Firms”	National Life CPA Symposium	September 9
“Koltin Selected as One of Top 10 Influencers to Accounting Profession”	Accounting Today	September 9
“Koltin Selected as One of Accounting Today’s 100 Most Influential for 16 th Straight Year”	Accounting Today	September 4
“Koltin Names as Professions 100 Most Influential for 16 th Straight Year”	Accounting Today	September 3
“CitrinCooperman Expands to Washington, DC Region”	Inside Public Accounting	September 2
“Baker Tilly Buys into Pennsylvania, Again”	Crain’s Chicago Business	August 27
“CitrinCooperman Merges with Regardie Brooks & Lewis”	CPA Practice Advisor	August 26

“Industry Trend Spotting with Allan Koltin”	The Rosenberg Associates	August 25
“Citricooperman Merges in Regardie Brooks & Lewis”	Accounting Today	August 25
“Chicago Firm FGMK Joins TIAG”	CPA Practice Advisor	July 29
“CohnReznick Aims for Top 10; Baker Tilly Jumps into Top 15”	Public Accounting Report	July 2015
“Armanino Plants its Flag in Los Angeles”	Public Accounting Report	July 2015
“Koltin Delivers Keynote at UHY Advisors National Leadership Conference”	UHY Advisors Conference	June 23
“Baldwin CPAs Acquire Kentucky Accounting Firm”	CPA Practice Advisor	June 22
“Baldwin CPAs and Eldridge Jackson and Leedy Merge”	Accounting Today	June 20
“This is What it Takes to Hire a CPA These Days”	Crain’s Chicago Business	June 20
“Baldwin CPAs Merges with Eldridge Jackson Leedy”	Inside Public Accounting	June 19
“Accounting Firms Armanino and RBZ Merge”	CPA Practice Advisor	June 12
“Armanino Joins with Los Angeles Public Accounting Firm RBZ”	Market Watch	June 11
“Koltin Delivers Keynote to CPAs at National Life Conference”	National Life Conference	June 4
“CohnReznick Names CEO-Elect”	WebCPA	May 29
“Leadership Spotlight”	Convergence Coaching Website	May 21
“BDO to Acquire St. Louis Accounting Firm Stone Carlie”	CPA Practice Advisor	May 19
“BDO Merging in Stone Carlie to Become \$1 Billion Firm”	WebCPA	May 15
“Stone Carlie Bought by BDO USA”	St. Louis Business Journal	May 15
“Koltin Addresses University of Illinois – Chicago Accounting Club on “Success After College”	U of I Chicago Accounting Club	April 23
“Koltin Speaks on State of the Industry to Firm Leaders”	New York State Society of CPAs	March 23
“The Seven Key Questions When Thinking About an Accounting Firm Merger”	Accounting Web	February 26
“Overheard at the 2015 Winning Is Everything Conference”	Inside Public Accounting	February 3
“The 15 Absolutes of CPA Firm Growth”	Winning Is Everything Conference	January 29
“Buyers and Mergers of Equals Panel”	Winning Is Everything Conference	January 29
“Sellers and Mergers of Equals Panel”	Winning Is Everything Conference	January 29
“Troy Waugh Inducted into The Advisory Board Hall of Fame”	CPA Practice Advisor.com	January 29
“Accounting Firm Wipfli Expanding Across U.S.”	Milwaukee Journal Sentinel	January 17
“Wipfli Welcomes GHG”	Inside Public Accounting	January 8
“Merger Season Continues as Wipfli Adds Two Accounting Firms”	CPA Practice Advisor	January 7
“Wipfli Acquires Two Firms in Philly and Montana”	Accounting Today	January 1, 2015
“Our Annual Roundtable of Experts Look at the M&A Landscape in Accounting”	Accounting Today	January 1, 2015
“What Can Firms do to be Most Successful in 2015?”	Public Accounting Report	January 2015
“Eide Bailly Acquires Nevada Firm of Kafoury Armstrong”	CPA Practice Advisor	December 5
“Eide Bailly Expands in Nevada”	Accounting Today	December 2
“McGladrey Enjoys Return on Its Investment”	Public Accounting Report	December 2014
“BDO Tops \$1 Billion with Major Deals in Ohio and Texas”	Public Accounting Report	December 2014
“M&A Watch”	Accounting Today	December 2014
“Experts and Fellow Practitioners Give Insight into 2015”	Accounting Today	December 2014
“Eide Bailly Expands in Nevada”	Accounting Today	December 2014
“IPA’s Most Recommended Consultants Share Advice”	Inside Public Accounting	December 2014
“Two High Profile Acquisitions – SS&G and UHY’s Texas Practice – Push Growth-Minded BDO Above the \$1 Billion Mark”	Inside Public Accounting	December 2014
“Creating a Course for the Future – Talent Acquisition and Succession Planning”	Wolters Kluwer, CCH	November 27
“BDO to Acquire UHY’s Texas Practice”	Accounting Today	November 19
“BDO Expanding Again, This Time in Texas”	Crain’s Chicago Business	November 18
“Michigan Accounting Firms Merge”	CPA Practice Advisor	November 18
“Acquisition of UHY Advisors Increases BDO’s Reach in Texas”	CPA Practice Advisor	November 18
“Koltin Speaks at National Conference on How CPA Firms are Successfully Integrating Financial Services into Their Practices”	National Life Conference	November 6
“IPA 100 Firm, SS&G Acquired by BDO USA”	Inside Public Accounting	November 6
“BDO Enters Ohio with Addition of SS&G”	Crain’s Chicago Business	November 6
“National Accounting Firm BDO Expands Ohio Presence in Merger with Cleveland-based SS&G”	Crain’s Cleveland Business	November 5
“BDO Expands in the Midwest with SS&G”	Accounting Today	November 5
“Mengel Metzger Barr Bulks Up with Merger”	Accounting Today	October 31
“Bober Markey Accounting Firm Makes a Significant Cleveland Addition”	Crain’s Cleveland Business	October 26
“Arnett Foster Toothman and Carbis Walker Agree to Merge”	Accounting Today	October 24
“Koltin Addresses BDO Alliance Southeast Group on Traits of Great Firms and Great Leaders”	BDO Alliance Southeast Group Meeting	October 23
“Koltin Speaks in Barcelona to NEXIA Worldwide Leaders on Strategies for the Future”	NEXIA International Conference	October 17
“Arnett Foster Toothman and Carbis Walker Agree to Merge”	WebCPA	October 24
“McGladrey Acquires Battelle Rippe”	Accounting Today	October 2014
“10 Issues that are Keeping Accountants up at Night”	Accounting Today	October 2014
“Is BTVK Marching Toward the Billion Dollar Threshold?”	Public Accounting Report	October 2014

“Koltin Named to IPA Most Recommended Consultants List”	Inside Public Accounting	October 2014
“The Road to Thought Leadership”	Growth Strategies (AAM)	Fall 2014
“BKD and Wolf & Company to Merge”	Accounting Today	September 29
“Strategies for Growing the Firm other than Organically”	Boomer Consulting Webinar	September 19
“McGladrey Acquires Battelle Rippe Kingston”	Accounting Today	September 16
“McGladrey Acquires Battelle Rippe Kingston”	CPA Practice Advisor	September 15
“Koltin Named to Most Influential in Accounting Industry for 15 th Straight Year”	Accounting Today	September 14
“The Biggest Issues Facing the Profession”	Accounting Today	September 1
“Advice for Young Accountants”	Accounting Today	September 1
“All Things Being Equal”	Illinois CPA Society Magazine	Summer 2014
“Unlocking the Secret to High Growth through Technically”	Wolters Kluwer CCH	August 16
“New Crowe Horwath CEO is used to Putting up Numbers”	Crain’s Chicago Business	July 16
“What’s in Your Partnership Agreement?”	Accounting Today	July 1
“All Things Being Equal”	Illinois CPA Society Insight Magazine	Summer 2014
“GALLINA on Shopping Spree in Western U.S.”	Sacramento Bee	June 28
“GALLINA Acquires Mellon Johnson Reardon”	Modesto Bee	June 28
“GALLINA LLP to Acquire Mellon Johnson Reardon”	Accounting Today	June 26
“Baker Tilly Mulls Accounting Merger That Could Lead to More Big Deals”	Crain’s Chicago Business	June 24
“Common Success Characteristics of High Performing Partners”	AICPA Emerging Leader Conference	June 23
“Current Trends in Partner Compensation”	AICPA Emerging Leader Conference	June 23
“TIAG Adds Another Top 100 U.S. Accounting Firm”	Insurance News	June 18
“Koltin Addresses Biggest Challenges of Managing Partners Relative to Growth, Profitability, Compensation, Talent and Succession Planning”	The Leading Edge Alliance Managing Partner Conference	June 11
“Ohio-Based Accounting Firm Joins TIAG”	CPA Practice Advisor	June 11
“Ohio-Based Accounting Firm Joins TIAG”	CPA Practice Advisor	June 11
“Koltin Consulting Group Selected as Top 40 Retained Search Firm”	Executive Search Review	May 23
“Recognizing the Value of Next Generation Cost Segregation Studies”	Accounting Today	May 14
“Koltin Delivers Keynote on Best Practices at TIAG Conference”	CPA Practice Advisor	May 6
“What is Your IT Strategy?”	Accounting Today	April 1
“Judge Gives Anchin a Retrial in Patricia Cornwell Lawsuit”	Accounting Today	March 27
“Rothstein Kass and KPMG Merger Chitchat”	Accounting Today	March 7
“How Effective is Your Firm’s Mentoring Program”	CPA Practice Management Forum	March 2014
“Koltin Named One of Top 25 Thought Leaders in the Profession”	CPA Practice Advisor	February 18
“CBIZ Acquires Lewis Birch & Ricardo”	Accounting Today	February 3
“Koltin Discusses the Ten Plagues of CPA Firm Greatness”	Winning Is Everything Conference	January 16
“Koltin Discusses Current Trends in Mergers and Acquisitions”	Winning Is Everything Conference	January 16
“The Bean Counter’s Interview with Allan Koltin”	The Bean Counter Podcast	January 3
“The Ten Plagues of CPA Firm Greatness”	CPA Practice Management Forum	January 2014
“Year-End Partner Compensation Discussion – Slicing the Pie”	Accounting Web.com	December 30
“BDO Snaps up Alpern Rosenthal”	Accounting Today	December 12
“Industry Leader, Koltin, Share Advice for 2014”	Inside Public Accounting	December 2013
“Expert Spotlight on Succession Planning and M&A Choices”	CCH Leaders White Paper	November 12
“Expert Spotlight: Koltin on Succession Planning and M&A”	CCH Conference White Paper	October 28
“What Truly Makes for Great Firms, Great Partners and Great Leaders”	HLB International Conference	October 25
“Best Practices of Accounting Firms and What Makes Them Successful”	AGN International Conference	October 24
“Accounting M&A Deals are Adding Up”	Crain’s Cleveland Business	October 20
“Allan D. Koltin’s Outlook on CPA Firm Mergers”	AAM - Growth Strategies	Fall 2013
“TIAG Adds Another U.S. Top 100 Firm – Gallina LLP”	PR Web	September 27
“Graying of Accounting Firms Leads to Mergers”	Crain’s New York Business	September 29
“Koltin Named as One of Industry’s Most Recommended Consultants for Tenth Straight Year”	Inside Public Accounting	September 23
“Carr Riggs & Ingram adds Houston Location with Gainer Donnelly Merger”	Inside Public Accounting	September 20
“Top 10 Canadian Accounting Firm Joins the International Group”	CPA Practice Advisor	September 19
“CRI Merges with Gainer Donnelly”	Accounting Today	September 19
“State of the Accounting Industry”	NYSSCPA Large Firm Conference	September 16
“Koltin Goes Back to the Basics with Selling Professional Services”	Public Accounting Report	September 2013
“Koltin Named to Accounting Today 100 Most Influential for Fourteenth Straight Year”	Accounting Today	September 2013
“Goal Setting – The Best Kept Secret of the Top Three Percent Performers”	CPA Practice Management Forum	September 2013
“Top 50 US Accounting Firm Joins International Firm Alliance”	CPA Practice Advisor	August 1
“Top 50 US Accounting Firm Joins TIAG”	Newsday	July 31
“State of the Accounting Industry – Opportunities and Trends”	CBIZ/MMH Conference	July 11
“In ‘Merger-Prone’ Accounting Industry He is the One to Know”	DealMaker Alert	July 10
“The Most Interesting Man in the Accounting World”	Going Concern	July 8
“Mind the Profit Gap When it Comes to Partner Compensation”	Accounting Today	July 8

“Tips for Productive Partner Retreats”	Accounting Web	July 8
The Linchpin of Accounting: Matchmaker Koltin Knows Everyone in the Business”	Crain’s Chicago Business	July 8
“The Most Interesting Man in Accounting”	Ishade	July 8
“Building a Strong Partner Compensation System”	Accounting Today	July 2013
“Firm of the Future – Snapshot of Tomorrow”	Accounting Today	July 2013
“How Firms Can go From Great to Good:	CPA Practice Management Forum	July 2013
“How to Facilitate a Leadership/Partner Retreat”	AICPA Practitioners Conference	June 11
“Current Trends in Partner Compensation”	AICPA Practitioners Conference	June 11
“The Ten C’s of Great Leaders”	New England Institute of Chartered Accountants	June 2013
“New Top 150 Firm Emerges on the West Coast”	Public Accounting Report	June 2013
“The Leadership Cycle: The Ten C’s of Great Leaders”	Journal of Accountancy	June 2013
“Peterson Sullivan and Clothier & Head to Merge”	Accounting Today	May 29
“Peterson Sullivan and Clothier & Head to Merge”	Inside Public Accounting	May 28
“Baker Tilly Virchow Krause Takes the Long Road to the Big Apple”	Public Accounting Report	May 2013
“Back to the Basics: Selling Professional Accounting Services”	CPA Practice Management Forum	May 2013
“Accounting Firms Merge”	Newsday	April 25
“Baker Tilly Merges with New York Accounting Firm”	CPA Practice Advisor	April 24
“Two IPA 100 Join Forces”	Inside Public Accounting	April 24
“Baker Tilly and Holtz Rubenstein to Merge”	Accounting Today	April 24
“KPMG Scrambles to Control Damage of Insider Trading Scandal”	LA Times	April 13
“Accounting Firm Mergers”	CPA Practice Management Forum	March 2013
“Mass Consolidations in Works for Houston Accounting Firms”	Houston Business Journal	February 8 – 14
“Lock Down Superstars with Above Market Compensation”	Public Accounting Report	February 2013
“Koltin Provides Update on State of the Industry”	Winning Is Everything Conference	January 16
“Warren Averett and Pender Newkirk Merge”	Accounting Today	January 9
“Blum Shapiro Expands in New England”	Web CPA	January 8
“Blum Shapiro Acquires Providence Firm”	Inside Public Accounting	January 8
“Warren Averett Sweeps the Southeast with Two Mergers”	Inside Public Accounting	January 8
“Koltin Addresses Major Firms Group on Industry Issues”	AICPA Major Firm Group	January 7
“Mergers Boost SS&G Profile in Windy City”	Crain’s Cleveland Business	January 7
“Accounting Firms Roll Through Expected Wave of M&A Activity”	Houston Business Journal	January 4
“The Changing Face of M&A”	Accounting Today	January 1
“Warren Averett Doubles Down with Combinations in Atlanta and Tampa”	Public Accounting Report	January 2013
“Coaching to Affect Change and Develop Talent”	CPA Practice Management Forum	January 2013
“Ten Steps to Navigating Mergers”	Illinois CPA Society Magazine	Winter 2012
“Ten Helpful Steps for Navigating CPA Firm Mergers”	Insight Magazine	Winter 2012
“Richter and SBLR Pair Up”	Accounting Today	December 11
“Building Kirkland & Ellis’ Law Firm Business”	Crain’s Chicago Business	December 3
“Koltin Named One of the Profession’s 25 Top Thought Leaders”	CPA Practice Advisor	November 30
“Koltin Speaks on the Strategies for CPA Firm Growth”	Engineered Tax Services	November 29
“Koltin Speaks on Best Practices of Successful Firms”	New England MAP Conference	November 28
“Koltin on How CPA Firms are Starting to Grow Again”	Accounting Today	November 15
“Growth Begins at Home”	Accounting Today	November 1
“CPA Firm Merger Frenzy Among Top 200 Firms”	Inside Public Accounting	November 2012
“Most Recommended Consultants Share Predictions for 2013”	Inside Public Accounting	November 2012
“Best Practices of High Performing Accounting Firms”	Accounting Today Conference	October 30
“BDO Adds Major Philadelphia Firm, Asher”	Accounting Today	October 24
“HSMC & Orizon Complete Merger”	Accounting Today	October 19
“BDO Brings Argy On Board”	Accounting Today	October 10
“Koltin Named One of Most Influential in Accounting Industry”	The Bottom Line	October 2
“Gainer Donnelly and Briggs & Veselka Discontinue Merger Discussions”	Inside Public Accounting	October 2
“Projections for CPA Profession for 2013”	Rosenberg Survey	October 2012
“The Benefits of Being Famous”	CPA Practice Management Forum	October 2012
“BDO Welcomes New Deal, New CEO”	Public Accounting Report	October 2012
“Briggs & Veselka and Gainer Donnelly Walked Away From Merger Talks”	Houston Business Journal	September 25
“Koltin Named to Most Recommended Consultant List”	Inside Public Accounting	September 14
“Koltin Delivers Keynote Address at CPAmerica Leading Partners Conference”	CPAmerica	September 19
“Yeo & Yeo Acquire Detroit Metro-Area Firm”	Inside Public Accounting	September 18
“Koltin Named to <i>Accounting Today</i> “100 Most Influential” for 13 th Straight Year”	Accounting Today	September 10
“Protecting the Firm”	CPA Practice Management Forum	September 2012
“Legal Community Braces for Huge Turnover in Legal Population”	ABA Journal	August 24
“Mayer Steps Down as CEO at BPM”	Accounting Today	August 14
“BK-PM Deal Symbolizes Evolution of Competitive Landscape in Chicago”	Public Accounting Report	August 2012
“Industry Pressure Drives Accounting Firm Consolidation”	Washington Business Journal	July 20
“Koltin Predicts Baker Tilly Will Win Lawsuit”	Crain’s Chicago Business	July 18

“Best Practices on Firm Governance”	CPA Practice Management Forum	July 2012
“Plante Moran to Merge In Blackman Kallick”	Accounting Today	June 26
“Blackman Kallick to Merge with Plante Moran”	Crain’s Chicago Business	June 26
“How CPA Firms are Growing Their Financial Services Practices”	National Life	June 26
“Trends in Partner Compensation and High Performing Partners”	AICPA Emerging Leaders Conf.	June 25
“Recruiting Lateral Talent to Grow Your Firm”	Leading Edge Alliance	June 12
“Trends in M&A”	AICPA PCPS Conference	June 11
“Firm Leadership and Governance”	AICPA PCPS Conference	June 11
“Current Trends in the Accounting Profession”	National Life	June 5
“JH Cohn and Reznick Combine Forces”	Public Accounting Report	June 2012
“Len Weitz of Mann Weitz & Associates Dies”	Accounting Today	May 30
“JH Cohn and Reznick Group to Merge”	Accounting Today	May 22
“IPA 100 Firms Combine Forces”	INSIDE Public Accounting	May 22
“State of the Accounting Profession”	DFK International Conference	May 17
“Current Trends in the Accounting Profession”	BDO Seidman Alliance	May 9
“Why B Students Make Great Partners”	CPA Practice Management Forum	May 2012
“Behind the Merger Scene”	INSIDE Public Accounting	May 2012
“Strategies for Growth”	INSIDE Public Accounting	May 2012
“Current Trends in M&A”	Eide Bailly Conference	April 27
“Whitley Penn Mergers In Null Lairson”	Accounting Today	April 20
“Ernst & Young Names New Midwest Chief”	Crain’s Chicago Business	April 9
“Huron Consulting Lives to Survive”	Crain’s Chicago Business	April 9
“Five Areas Every Firm Should Excel in to be Competitive Today”	Accounting Today	April 1
“Koltin Addresses Large-Firm Managing Partners of New York CPA Society”	WebCPA	March 27
“BDO USA Elects Wayne Berson as New CEO”	WebCPA	March 26
“Koltin’s Thoughts and Observations on the Profession”	Eyeshade	March 20
“Accountants Have Evolved Into Business Advisors”	New Mexico Business Weekly	March 2
“Yet Another Merger That Just Wasn’t Meant to Be”	INSIDE Public Accounting	March 2012
“Best Practices on Succession Planning”	CPA Practice Management Forum	March 2012
“The Marriage is Over...Before It Began”	INSIDE Public Accounting	February 10
“BPM and Windes Call Off Merger”	Accounting Today	February 10
“Beyond the Numbers – The South Florida Phenomenon”	The Miami Herald	February 6
“Overheard at the 2012 Winning Is Everything Conference”	INSIDE Public Accounting	February 2012
“Three-Way Merger Creates a Southeast Firm Among the Top 50”	INSIDE Public Accounting	February 2012
“Koltin Named One of Top Thought Leaders in the Profession”	CPA Practice Advisor	January 29
“Koltin Named as One of Professions Top 25 Thought Leaders”	CPA Trendlines	January 28
“Koltin Named One of 25 Top Thought Leaders in Profession”	The Summa	January 28
“Southeast Merger Creates New Top 35 Firm”	INSIDE Public Accounting	January 23
“Koltin Sees Better Times Ahead for Accounting Profession – the Worst is Over”	Winning Is Everything Conference	January 19
“Koltin Named One of Top 25 Thought Leaders for 2012”	CPA Practice Advisor	January 19
“Former NFL QB Says Accountants Should go for 10”	Accounting Today	January 19
“Advisory Board Roundtable Addresses Top Concerns”	Accounting Today	January 19
“Firm MPs: Merge with Caution”	Accounting Today	January 19
“SS&G’s Lead Dog to Exit after 27-Year Run”	Crain’s Cleveland Business	January 16
“Warren Averett to Merge in Wilson Price and O’Sullivan Creel”	WebCPA	January 10
“Three Southeast Firms Join Forces to Create a Top 5 Southeast Powerhouse”	INSIDE Public Accounting	January 9
“Firm M&A is Expected to Boom Even More in 2012”	Accounting Today	January 4
“Marcum Expands in Boston by Acquiring RF&L”	Accounting Today	January 4
“Everyone, Grab Your Partners - Firm M&A is Expected to Boom Even More in 2012”	WebCPA	January 1
“Plante Moran to Merge In Blackman Kallick”	Accounting Today	June 26
“New Southeastern Giant Awakens as Three Firms Merge into One”	Public Accounting Report	January 2012
“Koltin to Speak at Symposium on Profession’s Top Thought Leaders”	CPA Practice Advisor	January 2012
“Koltin Offers Insights on Partner Compensation”	CPA Leadership Report	January 2012
“Strategies for Growth: The Triangle Offense”	CPA Practice Management Forum	January 2012
“The Elephant in the Room – Succession a Top Priority for CPA Firms”	Insight	Winter 2011
“Entering an Era of Mergers: Clifton Gunderson Example of National Trend”	Milwaukee Business Journal	December 23
“Building Deeper Relationships and Expanding Services to Existing Clients”	Thomson Reuters Webinar	November 29
“Clifton Gunderson, LarsonAllen Merger Creates New Top 10 Super-Regional”	Public Accounting Report	November 22
“Keep an Eye out for California Merger Quakes”	Public Accounting Report	November 22
“Merger Frenzy Likely to Continue”	Hartford Business Journal	November 20
“Accountants Roles Expand Beyond Numbers”	Crain’s Cleveland Business	November 8
“Firms Set Torrid Pace in 2011 M&A”	Accounting News Report	November 6
“Business Resurging for Accounting Firms”	Thomson Reuters Users Conference	November 4
“Business Resurging for Accounting Firms”	Accounting Today	November 4
“Those Needy Clients are Sick of You Not Giving Them Enough Attention”	Going Concern Memo to CPAs	November 4

“Big Merger for Two Accounting Firms”	Minneapolis Star Tribune	November 3
“Clifton Gunderson and LarsonAllen to Merge”	WebCPA	November 1
“Common Characteristics of Successful Partner Compensation Programs”	CPA Practice Management Forum	November 2011
“Boulay Heutmaker Merges in Hansen Jergenson”	Accounting Today	October 31
“Two Major Mergers Yield California Gold”	Public Accounting Report	October 24
“Flat Growth and Mega-Mergers Mark 2011 Top 100”	Public Accounting Report	October 24
“SS&G Expands South; Coasts Next?”	Crain’s Cleveland Business	October 9
“Creating Visibility for Your Firm and Famous Person Status for Your People”	Thomson Reuters Webinar	October 4
“Koltin Named One of Top Consultants in the Industry for the Past Six Years”	Inside Public Accounting	October 2011
“Burr Pilger Mayer – Windes in Blockbuster Merger”	Accounting Today	September 30
“How Accountants Charge for Major Services”	New Mexico Business Weekly	September 30
“Using the Triangle Offense – Growing Organically Through Mergers and Lateral Hires”	The Advisory Board’s “Winning Clients” Conference	September 26
“Koltin Named to 100 Most Influential for Twelfth Straight Year”	Accounting Today	September 14
“Advantages of Becoming Larger Have CPA Firms Considering Acquisitions”	Memphis Business Journal	September 2
“Burr Pilger Mayer Merges with Windes”	Inside Public Accounting	September 2011
“H&R Block-RSM McGladrey Divorce may be for the Best”	Kansas City Business Journal	August 26
“Are Your Firm’s Partners as Productive as You Think?”	Public Accounting Report	August 24
“H&R Block Sells RSM to McGladrey & Pullen”	Accounting Today	August 23
“CBIZ Acquires Memphis-based Thompson Dunavant”	Inside Public Accounting	August 4
“CBIZ Acquires Thompson Dunavant”	Accounting Today	August 1
“Thompson Dunavant Buyout to Spur Local Growth”	Memphis Business Journal	July 29
“CBIZ/Mayer Hoffman McCann to Acquire Thompson Dunavant”	Accounting Today	July 26
“Layoff Watch 2011: The Bloodbath is Definitely Over for Accounting Profession”	Going Concern	June 20
“Local Businesses Replenish Staffing Levels after Recent Years of Industry Tumult”	Crain’s Cleveland Business	June 19
“Argy Focuses on Florida Footprint”	Accounting News Report	May 22
“Wipfli Opens Chicagoland Office”	Accounting News Report	May 22
“When is a Partner Not Productive? And What to do About It.”	CPA Practice Management Forum	May 2011
“WeiserMazars Enters Windy City Market”	Accounting News Report	March 6
“Merger Wave Rippling Through, Changing Accounting Field”	New Mexico Business Weekly	March 4
“IPA Most Recommended Consultant, Allan Koltin, Rebrands and Sheds Publishing Arm”	Inside Public Accounting	March 2011
“McGladrey & Pullen’s Scudder Resigns, Led During H&R Block Run-In”	Kansas City Business Journal	February 22
“McGladrey & Pullen MP David Scudder Stepping Down”	Accounting News Report	February 21
“Firm Partnership Agreements are Too Often Out of Date”	Accounting Today	February 1
“Thomson Reuters Acquires PDI Global, Inc.”	Accounting Today	February 1
“Dixon Hughes Goodman Emerges from Southeast Mega-Merger”	Inside Public Accounting	February 2011
“M&P Seeks New MP after Scudder Resigns”	Public Accounting Report	January 31
“Koltin Sells PDI Publishing to Thomson Reuters”	Solutions for CPA Firm Leaders	January 25
“2011 Will Present Competitive Litmus for Firms”	Accounting Today	January 24
“Thomson Reuters Acquires PDI Publishing Unit”	Accounting Today	January 24
“Key Take-aways from Winning Is Everything 2011”	CPA Trendlines	January 21
“Market Demand Continues to Drive Accounting Firm Mergers Through 2011”	Public Accounting Report	January 15
“Windham Brannon Merges in Tarpley & Underwood”	Accounting Today	January 14
“Accounting Firm Increase in M&A Activity Forecasted for 2011”	MicroCap Blog	January 13
“Dixon Hughes Merges with Goodman”	Accounting Today	January 11
“Meyners Spurned Other Offers Before Clifton Deal”	New Mexico Business Weekly	January 7
“Clifton Gunderson Acquires Meyners & Co.”	Accounting Today	January 7
“Let’s Make a Deal”	Accounting Today	January 5
“IPA’s Most Recommended Consultants Share Advice on Best Practices”	Inside Public Accounting	January 2011
“PDI Sells Publishing Arm, Revamps Consulting Branch”	Public Accounting Report	December 15
“CBIZ Acquires Kirkland Russ Murphy & Tapp”	Inside Public Accounting	December 2010
“Cherry Bekaert Holland Merges in McLeod”	WebCPA	November 29
“CBIZ Acquires IPA Best of the Best Firm”	Inside Public Accounting	November 8
“Accounting Industry Prepares for Shake Up as M&A Becomes Preferred Growth and Exit Strategy”	Puget Sound Business Journal	November 5 - 11
“CBIZ/Mayer Hoffman McCann Acquires “Kirkland Russ Murphy & Tapp”	WebCPA	November 5
“Clifton Acquires Farrell & Associates”	WebCPA	November 1
“Sikich Fearless M&A”	Accounting Today	Oct 25 – Nov 14
“Sikich Follows its Merger Strategy into New Practice Areas.”	Accounting Today	Oct 25 – Nov 14
“Growing Through M&A”	The American Chronical	October 22
“Recession Ramps up Pressure in Accounting Industry”	Crain’s Chicago Business	October 18
“M&A Activity Heats Up as Smaller Firms Look Upstream”	Crain’s Chicago Business	October 18
“SS&G Expands into Windy City”	Public Accounting Report	October 15
“Marcum Goes West Coast, Aims for National Footprint”	Public Accounting Report	October 15
“Gallina Merges in Burnett”	WebCPA	October 5

“Marcum Merges in Stonefield”	WebCPA	October 4
“Marcum Heads West with Acquisition of Stonefield Josephson”	Inside Public Accounting	October 1
“Thought Leadership and Best Practices: Partner Compensation”	CPA Practice Management Forum	October 2010
“Koltin Discusses Current Trends in the Accounting Profession and Explores Opportunities”	The Advisory Board Partner Compensation Symposium	September 21 & 28
“Koltin Shares Advice on Current Trends in Partner Compensation”	The Advisory Board Partner Compensation Symposium	September 20 & 27
“More M&A on the Way”	WebCPA	September 13
“Growing Through M&A”	IOMA Partners Report	September 10
“More M&A on the Way”	Accounting Today	September 10
“Koltin Named One of the 10 Most Influential in the Accounting Profession”	Accounting Today	September 10
“Managing Director Aims to Expand Accenture’s Chicago Footprint”	Crain’s Chicago Business	September 6
“Income/Non-Equity Partner Check List”	Inside Public Accounting	September 4
“EisnerAmper Launches New Chapter – Two Northeast Powerhouse Firms”	Inside Public Accounting	September 2010
“Eisner Mergers with Amper Politziner Mattia”	WebCPA	August 17
“Eisner, Amper Merging and Following their Niches”	Bowman’s Accounting Report	August 16
“Northeast Mega-Merger Creates Top 15 CPA Firm”	Inside Public Accounting	August 11
“Eisner and Amper Politziner Reportedly in Merger Talks”	WebCPA	August 10
“Larson Allen Merges in LeMaster Daniels”	WebCPA	August 6
“Cherry Bekaert Acquires Braver Schimler”	WebCPA	July 26
“RSM to Buy Caturano Firm”	Accounting Today	July 19
“Mid-Year Review: What Strategy Makes Sense Moving Forward?”	CPA Practice Management Forum	July 2010
“Change is the Word for Henry & Horne”	Public Accounting Report	June 30
“Beantown M&A Business Busy”	Public Accounting Report	June 30
“RSM Strategically Adds Pieces since AMEX Deal”	Public Accounting Report	June 30
“Carr Riggs & Ingram Merges with Cooper Grassi”	WebCPA	June 30
“McGladrey to Acquire Caturano”	WebCPA	June 28
“BDO Seidman Out from Under \$521 Million Verdict”	Bowman’s Accounting Report	June 25
“Koltin Offers Advice on M&A Integration and Best Practices”	AAA National Practice Management Conference	June 25
“Koltin Shares Strategies on Leadership, Pricing and Improving Performance”	AAA National Practice Management Conference	June 25
“M&A Activity Steady, but not Surging”	Public Accounting Report	June 15
“Henry & Horne Goes MP ² ”	Public Accounting Report	June 15
“Anchin Shines as the Largest Single-Office Firm”	Inside Public Accounting	June 10
“Clifton Gunderson Merges in Humes & Barrington”	WebCPA	June 4
“Humes & Barrington Merges with Milwaukee CPA Firm”	St. Louis Business Journal	June 4
“Clifton Gunderson Expands to New Markets”	WebCPA	June 2
“Mazars & Weiser Chiefs see International Growth”	WebCPA	May 13
Koltin Discusses Latest Trends in Partner Compensation	Moore Stephens North American Conference	May 13
“Thoughts on Attending the AAM Summit”	MarketTrends	May/June 2010
“How CPA Firms can Best Navigate the “New Economic Reality”	IOMA WebCast	May 3
“The 10 C’s of Great Leaders”	CPA Practice Management Forum	May 2010
“State of the Accounting Industry Address”	BDO Seidman Alliance Conference	April 28
“State of the Accounting Industry Address”	TIAG North American Regional Conference	April 22
“Current Trends in Mandatory Retirement: How do You Know When it is Time to Leave?”	CPA Practice Management Forum	March 2010
“Predictions for 2010 M&A Activity”	Inside Public Accounting	March 2010
“Baby Boomer Partners Who Stay Too Long”	Accounting Tomorrow Blog	February 18
“RSM McGladrey, McGladrey & Pullen Reveal Details of Agreement”	Kansas City Business Journal	February 15
“KPMG’s Rohrbaugh Sets Sights on Growth in Chicago”	Crain’s Chicago Business	February 8
“Overheard at 2010 “Winning Is Everything” Conference”	Inside Public Accounting	February 2010
“M&A Update”	Winning Is Everything Conference	January 22
“State of the Accounting Profession”	Winning Is Everything Conference	January 21
“How Baby Boomer Retirements Impact Up-and-Comers”	Accounting Today	Jan 11 – Feb 14
“M&P Partners Finalize RSM/H&R Block Controversy”	Accounting Today	Jan 11 – Feb 14
“Put Q&A Before M&A”	Accounting Today	Jan 11 – Feb 14
“Succession Planning Looms Even Larger”	Inside Public Accounting	January 2010
“Top M&A Trends for 2010”	CPA Practice Management Forum	January 2010
“McGladrey & Pullen Partners Vote to Reconcile with Block”	WebCPA	December 11
“RSM McGladrey, H&R Block, McGladrey & Pullen Expected to Announce Deal”	WebCPA	December 10
“Baker Tilly Virchow Krause to Merge with Beers + Cutler”	WebCPA	November 20
“Current Trends and Opportunities in Regarding Partner Compensation”	CPA Practice Management Forum	November 2009
“Citrin Cooperman to Merge in Carrow Doyle”	WebCPA	October 29

“Firm M&A is Still Hot and Heavy, but Making it Work Remains Tricky”	Accounting Today	Oct. 5-18, 2009
“Merge in Haste – Repent at Leisure”	Accounting Today	Oct. 5-18, 2009
“Predictions for 2009 Regarding Labor Costs, Cost Cutting and Marketing”	2009 Rosenberg Survey	October 1
“McGladrey, RSM Move to Reconciliation”	Kansas City Business Journal	September 25
“Koltin Named One of Most Recommended Consultants”	Inside Public Accounting	September 23
“LECG to Merge in Smart”	Accounting Today	Sept. 21 – Oct. 4
“Forums Tackle Accounting Firms Top Issues”	Accounting Today	Sept. 21 – Oct. 4
“Koltin Named One of <i>Accounting Today</i> ’s 100 Most Influential for 2009”	Accounting Today	Sept. 21 – Oct. 4
“Koltin Named One of Twelve Most Influential in Industry”	Accounting Today	Sept. 21 – Oct. 4
“Income/Non-Equity Partner Check List”	Inside Public Accounting	September 4
“RSM McGladrey/H&R Block Going to Arbitration with McGladrey & Pullen”	CPA Practice Management Forum	September 2009
“LECG to Merge with Smart”	Inside Public Accounting	August 19
“Marcum and Philadelphia-based Margolis Plan Merger”	Inside Public Accounting	August 19
“LECG to Merge with Smart”	WebCPA	August 18
“Marcum Merges in Margolis”	WebCPA	August 14
“Mega Merger of Accounting Firms Predicted”	WebCPA	August 14
“Accounting Firms Cope with Recession Pressures”	WebCPA	August 12
“SEC Investigates Huron Consulting”	WebCPA	August 11
“Huron Hovers”	Crain’s Chicago Business	August 10
“Insider E-News Update”	Inside Public Accounting	August 10
“Can Hobbled Huron Consulting Survive this Scandal?”	Crain’s Chicago Business	August 4
“RSM McGladrey: The Sharks are Swimming”	CPA Trendlines	August 3
“RSM/McGladrey & Pullen and H&R Block Need to Settle Their Differences”	Inside Public Accounting	August 2009
“PR and Beard Miller Merge”	Public Accounting Report	July 31
“M&P Decides to Leave, RSM and Block Sue”	Public Accounting Report	July 31
“RSM McGladrey, McGladrey & Pullen Set Off Messy Division”	Kansas City Business Journal	July 31
“Parente Randolph and Beard Miller Merge”	WebCPA	July 27
“McGladrey & Pullen to Divorce Block”	WebCPA	July 21
“What Best Practices are Used in Managing a Multi-Office Firm?”	CPA Practice Management Forum	July 2009
“Plante Moran Adds to Ohio Footprint”	Public Accounting Report	June 30
“Baker Tilly Name Change is Official”	Public Accounting Report	June 30
“The Last Word on Mergers and Acquisitions”	Practical Accountant	June 15
“Merger & Acquisition Activity from Koltin”	Rita Keller Blog/Newsletter	June 15
“Former BDO CEO Indicted for Tax Shelters”	WebCPA	June 10
“Grant Thornton Names Nusbaum International CEO”	Crain’s Chicago Business	June 3
“Most Recommended Consultant Shares Predictions, Trends and Insights for 2009”	Inside Public Accounting	June 2009
“BKD Merges in KBA”	Public Accounting Report	May 31
“M&A Experts Offer Up Deal-Making Insights”	Public Accounting Report	May 31
“Partner Retreats/Advances* - Is Yours in Sync with the Changing Size and Goals of Your Firm?”	CPA Practice Management Forum	May 2009
“Two Top 100 Firms Announce Merger Today”	Inside Public Accounting	May 21
“Marcum Merges with Rachlin”	WebCPA	May 21
“BKD Merges in KBA”	WebCPA	May 21
“Allan Koltin on CPA Industry Trends”	Bowman’s Accounting Report	May 15
“Expert Speaks on Post-Season Staffing Trends”	Inside Public Accounting	May 2009
“As Audit Clients Turn Away from Big Four, BDO Rises”	Crain’s Chicago Business	April 20

“Recession Report: What Should You Expect?”	Accounting Office/Management Report	April 2009
“Lateral Partner Hires Provide the Right Prescription for Growth”	Inside Public Accounting	April 2009
“Reflection on 2008 and a Look Ahead at 2009”	CPA Practice Management Forum	March 29
“A Prayer for the Not-Quite-Dying”	CFO Magazine	March 1, 2009
“CEOs Reflect on Challenges, Best Practices”	WebCPA	January 30
“Winning Is Everything Update: Teamwork, M&A, Honors”	WebCPA	January 29
“CBIZ and MHM Deal Adds to New England Ops”	Public Accounting Report	January 26
“Even Recession Can’t Stop the Steady Drumbeat of Firm Mergers”	Accounting Today	January 26
“CBIZ to Acquire NYC Mahoney Cohen”	Accounting Today	January 5 - 25
“Waning Economy Moves into the New Year”	Buffalo Business First	January 2, 2009
“Extra Busy in Bad Times”	Crain’s Chicago Business	December 22
“CBIZ Acquires Tofias”	WebCPA	December 18
“CBIZ Acquires Tofias”	Bowman’s Accounting Report	December 17
“CBIZ/MHN Deal Adds to New England”	Public Accounting Report	December 15
“M & A Guru Koltin expects Large Nationals to Resort to Deal Making in 2009”	Public Accounting Report	December 15
“CBIZ Acquires Mahoney Cohen – More Mergers Than Ever Expected to be Announced over Next 12 Months”	Inside Public Accounting	December 8

“Is Your Firm a Book-of-Business Firm?”	CPA Practice Management Forum	November 2008
“CBIZ Acquires Mahoney Cohen”	WebCPA	November 26
“Buffett was Client of Accused Deloitte Partner”	Crain’s Chicago Business	November 12
“M&A Guru Expects Several More Big Deals in Tampa”	Public Accounting Report	September 30
“True Partners Look Overseas for Alliances”	Crain’s Chicago Business	September 9
“Succession Planning is Often Successful”	Bottom Line	September 8
“Allan Koltin on Succession Planning and Thought Leadership”	Bowman’s Accounting Report	August 18
“UHY Advisors Appoint Co-CEOs”	Web CPA	August 5
“Blackman Kallick Mourns Fensin”	Accounting Today	July 21
“Blackman Kallick Mourns Fensin”	Web CPA	June 19
“BKD Merges With Hanke Group”	Web CPA	June 14
“Horwath Orenstein Merges with Meyers Norris Penny”	Web CPA	June 14
“Two Top 100 CPA Firms Combine to Form Northeast Powerhouse”	Inside Public Accounting	June 2008
“JH Cohn Bolsters California Presence”	Public Accounting Report	May 30
“Vitale Caturano Co-Founder Resigns”	Web CPA	May 16
“BKD Boldly Drives South, Merging Three Firms at Once”	Bowman’s First Alert	May 16
“Amper Combines with Goldenberg Rosenthal”	Public Accounting Report	May 15
“Vitale Caturano Co-Founder Resigns”	Public Accounting Report	May 15
“New Jersey Firm’s Deal with Philadelphia Firm Raises the Bar”	Bowman Accounting Report	May 9
“The Most Powerful Leadership Tool of The Decade: Upward Evaluations”	CPA Practice Management Forum	May 2008
“Three Mississippi Firms Combine with BKD”	WebCPA	May 6
“Amper Politziner Mergers with Goldenberg Rosenthal”	WebCPA	May 6
“Andersen Collapses”	Crain’s Chicago Business	March 31
“Special Talent Lifts SRR”	Chicago Sun Times	March 23
“Auditors Look to Extend Post-SarBox Glow”	Financial Week	March 3
“Managing Partner Succession – Who Will Your Next Leader Be?”	CPA Practice Management Forum	March 2008
“Industry Leader, Koltin, Offers Predictions, Trends and Insights for 2008”	Inside Public Accounting	March 2008
“CH&H Adds to Florida Operations and Peach State Practice”	Public Accounting Report	February 29
“Accounting Firms Prepare for Slowdown after Banner ‘07”	Boston Business Journal	February 22
“Firms Change Political Correctness”	Web CPA	February 13
“Retirement and Succession Planning are Driving Red-Hot M&A Market”	Accounting Today	January 28
“What Does it Take to Have a Successful Strategic Plan?”	CPA Practice Management Forum	January 2008