

## Citrin Cooperman adds Schneider & Associates

By

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Sandra Schneider and the staff of her firm Schneider & Associates LLC have joined the Bethesda, Md., office of Citrin Cooperman & Co., effective Jan. 1, 2018.

Schneider, a CFP, has been providing tax planning and tax preparation for clients in the Bethesda area, near Washington, D.C., for more than three decades.

“Our Bethesda office has been tremendously successful for us,” said Citrin Cooperman CEO Joel Cooperman in a statement. “We are very excited to have Sandy and her team join the firm as we look to continue to grow the D.C.-Metro market.”

Schneider and her firm’s director, Julie Schoen, intend to continue to focus on tax and estate planning for high net worth individuals, trusts and estates. Her clients include law firm partners, business executives, families and government employees. Schneider’s firm also prepares federal disclosure forms for presidential appointees.

“We’re thrilled to be joining the Citrin Cooperman team,” Schneider said in a statement. “I look forward to introducing our clients to the robust resources and value-added services Citrin Cooperman will allow us to provide.”

Financial terms of the deal were not disclosed. Citrin Cooperman, based in New York, ranked 21st on Accounting Today’s 2017 list of the Top 100 Firms. In 2017 Citrin saw billings exceeding \$240 million. Citrin has 1,000 employees, including 214 partners and principals, while Schneider & Associates has one partner and five staff members.

Koltin Consulting Group CEO Allan D. Koltin advised both firms on the deal. “Sandra Schneider and her team had been approached by numerous larger firms but felt that Citrin Cooperman’s depth of resources, great leadership and wonderful culture would make it a great place for their clients and staff,” he said in a statement. “Citrin Cooperman continues its journey as one of the fastest growing and dynamic firms in the country.”



Bethesda, Maryland

## Schneider & Associates Joins Citrin Cooperman

January 4, 2018 by [INSIDE Public Accounting](#)

New York-based **Citrin Cooperman** (FY16 net revenue of \$233 million) acquired **Schneider & Associates** of Bethesda, Md., effective Jan. 1.

Schneider & Associates has been providing tax planning and tax for more than 30 years. **Sandra Schneider**, along with director **Julie Schoen**, focus on tax and estate planning for high-net-worth individuals and their families. The group's clients include law firm partners, business executives, multi-generational families and government employees.

"I look forward to introducing our clients to the robust resources and value-added services Citrin Cooperman will allow us to provide," says Schneider.

**Allan Koltin**, CEO of Koltin Consulting Group, who advised both firms on the combination commented, "Sandra Schneider and her team had been approached by numerous larger firms but felt that Citrin Cooperman's depth of resources, great leadership, and wonderful culture would make it a great place for their clients and staff. Citrin Cooperman continues its journey as one of the fastest growing and dynamic firms in the country. The secret to their merger success has been their ability to successfully integrate high performing and entrepreneurial firms into their culture."

## Citrin Cooperman Acquires Schneider & Associates

JAN 3, 2018

Citrin Cooperman announced today that Sandra Schneider and her staff of Schneider & Associates, LLC has joined the Bethesda, MD office of the firm as of January 1. Schneider, along with Director Julie Schoen, will continue to focus on sophisticated tax and estate planning for high net worth individuals and their families.

“Our Bethesda office has been tremendously successful for us,” said CEO Joel Cooperman. “We are very excited to have Sandy and her team join the firm as we look to continue to grow the DC-Metro market.”

Schneider & Associates, LLC has been providing tax planning and tax preparation for a sophisticated client base in Bethesda, MD for over 30 years. Their tax practice focus has been on high net worth individuals, trusts, and estates. In addition to income tax work, Schneider is a Certified Financial Planner and works with clients on financial planning. The group’s clients include law firm partners, business executives, multi-generational families, and government employees. The firm also prepares federal disclosure forms for presidential appointees, and others.

“We’re thrilled to be joining the Citrin Cooperman team,” said Schneider. I look forward to introducing our clients to the robust resources and value-added services Citrin Cooperman will allow us to provide.”

Allan D. Koltin, CEO of Koltin Consulting Group, who advised both firms on the combination commented, “Sandra Schneider and her team had been approached by numerous larger firms but felt that Citrin Cooperman’s depth of resources, great leadership, and wonderful culture would make it a great place for their clients and staff. Citrin Cooperman continues its’ journey as one of the fastest growing and dynamic firms in the country. The secret to their merger success has been their ability to successfully integrate high performing and entrepreneurial firms into their culture.”

Citrin Cooperman is among the largest, full-service assurance, tax, and business advisory firms in the United States, having steadily built its business serving a diverse and loyal clientele since 1979. Our daily mission is to help our clients “focus on what counts.” Rooted in our core values, we provide a comprehensive, integrated business approach to traditional services, which includes proactive insights throughout the lifecycle of our clients, wherever they do business, across the globe. Citrin Cooperman has deep experience in a variety of industries, including entertainment, financial services, franchising, health care, private equity, real estate, and technology. Citrin Cooperman is an independent firm associated with Moore Stephens International Limited. [www.citrincooperman.com](http://www.citrincooperman.com)