

In Addition to our Practice Management Consulting & Partner Retreats,

We also Advise on Mergers & Acquisitions.

Recent M&A Deals are:

2021 BDO – Morrison Brown Argiz & Farra
Citrin Cooperman – Goren Marcus Masino & Marsh
EisnerAmper – Goldin Peiser & Peiser

2020 BDO – Biegel Waller
BDO – Piercy Bowler Taylor & Kern
Carr Riggs & Ingram – Crabtree Rowe & Berger
Citrin Cooperman – LGSH
CliftonLarsonAllen – Blum, Shapiro & Company
CliftonLarsonAllen – Weil & Co.
CliftonLarsonAllen – White Nelson Diehl & Evans
Eide Bailly – HMWC
Engineered Tax Services – The Growth Partnership
GBQ Partners – Weber Clark
Whitley Penn – Johnson Miller

2019

Armanino – Bolar Hirsch & Jennings
Baker Tilly – Montgomery Coscia & Greilich
BDO – Peterson Sullivan
Carr Riggs & Ingram – Wm. F. Home
Dixon Hughes Goodman – RyanSharkey
RSM – Tate & Tryon
Wipfli – Howe Riley & Howe
Wipfli – Klein Hall
Wipfli – Patke & Associates
Withum – Rucci, Bardaro & Falzone

2018

Aprio – RRB Business Services
Baker Tilly – MiddletonRaines+Zapata
Baldwin – Lindemeyer CPA
BDO – PBC Consulting
BDO – Smith & Gesteland
Carr Riggs & Ingram – Shinn & Company
Citrin Cooperman – D&H Global Tax Group
Citrin Cooperman – Schneider & Associates
CliftonLarsonAllen – MWA
Moss Adams – BPW&C
RSM – SecureState
Sikich – Knutte
Wipfli – Kessler Orlean Silver
Wipfli – Macpage

2017

Carr Riggs & Ingram – AGH
Carr Riggs & Ingram – Babush Nieman Kornman & Johnson
Carr Riggs & Ingram – Proctor Crook Crowder & Fogal
CliftonLarsonAllen – NSBN
CliftonLarsonAllen – Vicenti Lloyd & Stutzman

Crowe Horwath – Rowbotham
Lutz – McDermott Miller
Marcum – Hennagin
Squar Milner – Loomis
Wipfli – Horwich Coleman Levin
Wipfli – Sattell Johnson Appel
Withum – Portal Solutions

2016

Armanino – LaRue Corrigan McCormick Teasdale
Baldwin – Chris Humphrey
Barfield Murphy Shank & Smith –
Himmelwright Huguley & Boles
BDO – Feeley & Driscoll
BKD – Kiesling
Citrin Cooperman – KAF
CliftonLarsonAllen – Bruner & Cox
CliftonLarsonAllen – Gallina
GBQ – Ernst & Rabe
Marcum – Lautze
Perkins – Kessler Wiest Borquist
Wipfli – Weltman Bernfield

2015

Arnett Foster Toothman – Carbis Walker
Baldwin – Anderson Bryant Lasky Winslow
Baldwin – Eldridge Jackson & Leedy
BDO – CEA
BDO – SS&G
BDO – Stone Carlie
Citrin Cooperman – Regardie Brooks & Lewis
CliftonLarsonAllen – KFMR
Marcum – Frost
Wipfli – Galusha
Wipfli – Steinberg & Associates

2014

BDO – UHY Texas
CBIZ – Lewis Birch & Ricardo
CohnReznick – Walker Nell
Eide Bailly – Kafoury Armstrong
Gallina – Mellon Johnson Reardon
Maner Costerisan – McCartney
RSM – Battelle Rippe Kingston
Mengel Metzger Barr – Barone Siciliano

2013

Baker Tilly – Holtz Rubenstein Reminick
Baldwin – Chris Hatcher
Blum Shapiro – Sullivan & Company
Carr Riggs & Ingram – Gainer Donnelly
Peterson Sullivan – Clothier & Head
Peterson Sullivan – Davenny & Associates
Richter – SBLR
Rosen Sapperstein & Friedlander –
The Becker Group
Warren Averett – Pender Newkirk

2012

BDO – Argy Wiltse & Robinson
BDO – Asher
Clark Schaefer Hackett – Fentress & Barnes
Marcum – Robert Finnegan & Lynah
Orion – HSMC
Warren Averett – Wilson Price
Whitley Penn – Null Lairson
Yeo & Yeo – Hauswirth Moncrief