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Pinion to merge in Anderson ZurMuehlen

Pinion, a Loveland, Colorado-based Top 75 Firm formerly known as KCoe Isom, is planning to add Anderson ZurMuehlen, a Regional Leader based in Helena, Montana, effective Jan. 1, 2023.

KCoe Isom rebranded last month as Pinion. It dates back to 1932 and went through an earlier name change in 2015 when Kennedy & Coe, a firm based in Wichita, Kansas, merged with Matsom and Isom in Chico, California. The latest deal will enable Pinion to extend its footprint to Montana and add more business advisory and accounting services for clients.

Financial terms of the deal were not disclosed. KCoe Isom (now Pinion) ranked No. 69 on *Accounting Today's* 2022 list of the Top 100 Firms, with \$81 million in annual revenue. The firm has 46 partners and over 450 employees, with 22 offices across 11 states.

Anderson ZurMuehlen ranked No. 6 on *Accounting Today's* Regional Leaders list of the Top Firms in the Mountain Region, with \$29 million in annual revenue, and 43 partners and over 180 employees, with seven offices in Montana.



Courtesy of Pinion

"The combination of Pinion and AZ was an outstanding fit as both our storied histories center on community-focused values and a shared mission to drive businesses forward and improve the lives of those we work with," said Pinion CEO Jeff Wald in a statement Thursday. "As a combined firm, we look forward to the powerful expansion of resources, locations, and scope of service that will elevate businesses across the U.S."

Anderson ZurMuehlen was founded in 1957 and has grown into the largest Montana-based CPA and business services firm. The merger will enable its accountants to help clients beyond the state borders.

"This opportunity to join with Pinion has exceeded our hopes in finding a partner firm that offers complementary service and industry expertise," said Anderson ZurMuehlen CEO Rick Reisig in a statement. With our shared values and vision for serving our clients, we are excited to see how this relationship will evoke greater solutions and results across an expanded footprint."

Koltin Consulting Group CEO Allan Koltin advised both firms on the deal. "It's really a wonderful opportunity for both Pinion, formerly KCoE Isom and Anderson ZurMuehlen," he said in a statement. "I have worked with both firms for years and their cultures, people, and dedication to excellence are perfectly matched. I am very confident they will accomplish great things together."