

*"I liken him to a sports super-agent, such as Scott Boras, whom players seek out. If we want to do a deal, in most cases the firm is working with Allan already"*

*~Wayne Berson, CEO  
BDO USA LLP*

## Allan D. Koltin, CPA, CGMA



*"If there were an election of the most highly visible, sought-after consultant to CPA firms, Koltin would be the hands-down winner."*

*~Marc Rosenberg,  
Leading Consultant and  
Author to the CPA Industry.*

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, human capital, and mergers and acquisitions.

Highly sought for his ability to engage and inspire audiences, Allan enjoys delivering keynote addresses at conferences throughout the professional services industry. His passion is facilitating retreats and providing coaching for firm leadership and partners. His specialties include strategy, governance, profitability, compensation, growth, human capital, succession, and mergers and acquisitions.

For twenty-two consecutive years, Allan has been named by *Accounting Today* as one of the Top 100 Most Influential People in the accounting profession. In 2022, he was listed as the "Third Most Influential" in the profession. Koltin was also voted one of the 10 Most Recommended Consultants for the twentieth straight year in the "Annual Survey of Firms" conducted by *INSIDE Public Accounting*. For the past decade, Allan has also been named by *CPA Practice Advisor* as one of the Top 25 Thought Leaders in the profession. In 2016 CPA Practice Advisor inducted Allan into the Accounting Hall of Fame. He was also one of the first to be inducted into the Accounting Marketing Hall of Fame by the Association for Accounting Marketing (AAM). He has also been a recipient of the National Association of Certified Valuation Analyst's Instructor of the Year Award and winner of the *Journal of Accountancy* Literacy Award. Previously he was recognized by the Illinois CPA Society with the Distinguished Service Award for outstanding service and commitment to the profession.

A nationally recognized speaker and industry analyst, he has appeared on the CNN, WGN and Fox Television networks and has been quoted frequently in such media as the *Wall Street Journal*, *New York Times*, *Financial Times*, *Washington Post*, *Chicago Tribune*, *Los Angeles Times*, *USA Today* and *New York Post*, as well as *Bloomberg News*, *BBC World Service*, *Business Week*, *Forbes* and *Reuters*. He has also spoken nationally and internationally at hundreds of conferences including those held by the AICPA, international CPA associations and state CPA societies.

Previously, Allan was the President and CEO of PDI, Global, Inc. which was the largest provider of marketing materials for professional services firms. Allan originally sold PDI Global to H&R Block in 1998, buying it back in 2008, and then selling it again to Thomson Reuters in 2011. Prior to that, Allan was a Partner in the Chicago-based accounting and consulting firm of FERS, where he served as the leader of the Investment Banking and Law Firm Consulting Groups. At age 27, Allan had the distinction of being named the youngest partner in the history of the firm and was also a member of the firm's Executive Committee. FERS was acquired by H&R Block in 1998.

He is a founding member of The Advisory Board, a think tank for the accounting profession. For the past 20 years, The Advisory Board has hosted the Winning Is Everything Conference. Allan has served on various advisory boards, including SS&G, Outsource Partners International (OPI), the Association for Accounting Marketing (AAM), the National Association of Certified Valuation Analysts (NACVA), H&R Block (HRB Business Services) and ComplyGlobal.

Koltin is the author-editor of three books for professional services firms: *CPA Firm Merger Strategies That Work*, *CPAs That Sell* and the AICPA's *Marketing a Consulting Niche*. He serves or has served on the editorial advisory boards of *CPA Practice Management Forum*, the *Journal of Accountancy*, *Accounting Today*, *Public Accounting Report* and *Law Firm Management*.

Allan attended both the University of Wisconsin – Madison and the University of Wisconsin – Milwaukee and received degrees in accounting and marketing. He lives in Chicago with his wife, Sharon, his three children, Jack, Brian and Julia, and his two dogs, Bucky and Cody. His hobbies include travel, chess, and all sports.

312/662-6003 (t) [akoltin@koltin.com](mailto:akoltin@koltin.com) 312/805-0307 (c)

855-256-5846 [WWW.KOLTIN.COM](http://WWW.KOLTIN.COM)

625 N. Michigan Avenue, Suite 1225, Chicago, Illinois 60611

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