

Examples of Areas of Expertise on which Allan Koltin and the Koltin Consulting Group Have Consulted:

- **Facilitator of strategic planning sessions for various initiatives**
 - Helped a partner group to develop a one and five-year strategic plan for the firm
 - Conducted a manager and “emerging stars” session, as a springboard to their partner strategic planning session
 - Coached multiple managing partners, assisting them with various strategic, operational and partner-related issues
 - Provided strategic counsel in the creation of a recruiting program to attract experienced talent, as well as assisted in the development of a better-defined career pathing program
 - Advised partners of a firm on making significant changes to their culture, including the development of a program to retain talent and improve associate engagement at the firm (they were ultimately cited as a “Best Place to Work” and “Employer of Choice” firm.
 - Advised a firm that was simultaneously entering anew geographic market and launching a new practice niche

- **Advisor on Partner Compensation Issues**
 - Assisted a firm in moving from a strictly formula-based (book of business driven) compensation program to more of a one-firm approach, including development of both quantitative and qualitative goals for the partner group
 - Provided counsel to a firm converting from its existing deferred compensation program and valuation method (moved from the AAV method to the multiple of compensation method)
 - Served as annual advisor to managing partner in determining the allocation of partner compensation dollars and units/points
 - Advised a firm on improving their profitability and average partner compensation (involved tough decisions on talent and the firm philosophy on leveraging)
 - Helped a firm move their compensation from an open to a closed system and assisted in development of a compensation program for its newly elected Managing Partner

- **Leadership, Succession and Governance Assistance**
 - Assisted with a firm’s leadership succession and ultimate selection of a new Managing Partner
 - Helped a firm create a new governance program more reflective of its recent growth and current size, including redefining the roles of the Managing Partner, Department Heads, PIC’s, Executive Committee and Management Committee
 - Reviewed a firm’s partnership agreement, focusing on business-related changes and best practices that were absent from the current agreement
 - Helped move a firm from a one-tier partner group to a multi-tiered partner group, including defining the roles and responsibilities for equity, non-equity, part-time and contract partners
 - Assisted a firm with no succession plan to develop an executable plan to del with various retirement issues and was instrumental in getting certain partners to actually make a decision on their future tenure with the firm
 - Consulted with a firm in creating a leadership development program, including the implementation of an annual upward evaluation and a 360° review

- **Mergers and Acquisitions**
 - Helped two similarly-sized firms negotiate a successful merger of equals
 - Advised a firm on a “lift out” of lateral partners from a larger firm, including dealing with the non-solicitation provisions and corresponding financial arrangements
 - Served as principal advisor on many of the profession’s Top 500 mergers over the past five years

- **Firm Presentations**
 - Spoke at firm’s annual firm day on common success characteristics of high performing partners and associates
 - Spoke at numerous partner and leadership retreats on various topics

- **Miscellaneous**
 - Served as an expert witness for a firm involved in a litigation dispute with a former partner
 - Played the role of “bad guy” for a firm counseling out a disruptive and unproductive partner
 - Assisted a firm in evaluating and ultimately joining a CPA firm association, alliance, network, etc.