

Testimonials from recent conferences at which Allan Koltin has spoken:

“Allan Koltin was the highlight of the 2022 Rootworks Inspire Conference.”

Succession Planning Done Right (on a 1 – 100 scale)	Instructor’s Presentation Skills	Instructor’s Knowledge of the Subject	Delivery of the Session Learning Objectives
		97%	97%

“Allan is well known and trusted by the members of Moore North America, having worked with many of our firms personally. Therefore, it’s not surprising that he’s not only one of the most requested speakers for our conferences, but also the highest rated. His presentations on the state of the industry and best practices of high performing firms and leaders were not only insightful, but they elevated our delegates’ way of thinking and equipped them with practical takeaways for the future. His presence is always a showstopper, and we are grateful for his knowledge sharing and expertise.” **Ellen O’Sullivan, Executive Director, Moore North America**

“CLA had the pleasure and honor to have Allan Koltin join us at our Owner Promise Meeting in January 2020. While Allan’s knowledge of the industry impressed all in attendance, it was his natural ability to connect with our Owners and address their future opportunities, challenges and threats.... causing Allan’s presentation and interaction to be rated the top session of our event. While Allan was very familiar with CLA, he was also very familiar with the many Owners who he consulted with on their journey to join CLA. Allan’s connections, knowledge and willingness to speak openly and honestly with CLA made his time memorable and incredibly impactful.” **Denny Schleper, CEO, CliftonLarsonAllen re 2020 Owner Promise Meeting**

“AICPA ENGAGE 2022 Conference – Allan Koltin’s overall ratings were as follows:”

Current State of Mergers & Acquisitions in the Profession (on a 1 – 5 scale)	Instructor’s Presentation Skills	Instructor’s Knowledge of the Subject	Topic Relevance to my Practice
		4.65	4.76

“AICPA ENGAGE 2021 Conference – Allan Koltin’s overall ratings were as follows:”

How to Assess Your Firm’s Future Succession Paths – Internal vs. External (on a 1 – 5 scale)	Instructor’s Presentation Skills	Instructor’s Knowledge of the Subject	Topic Relevance to my Practice
		4.66	4.79

“AICPA ENGAGE 2019 Conference. Allan, thanks for your great participation. We truly appreciate the time and effort you put into your presentation and look forward to working with you on future conferences.”

Most Profitable Niches and How to Build Them (on a 1 – 5 scale)	Instructor’s Presentation Skills	Instructor’s Knowledge of the Subject	Topic Relevance to my Practice
		4.87	4.93

“Allan was highly effective as one of our keynote presenters at Rainmaker’s 2019 Super Conference recently. His approach and insights into the profession on what it takes to be Best In Class were well received by an audience looking to be inspired and motivated to move successfully into the future. Allan really got the audience thinking about the necessary steps to take in order to improve their leadership approach and best impact their firms. We have heard many positive reviews from the audience and were thrilled to have Allan speak. I highly recommend him!” **Angie Grissom, President, The Rainmaker Companies**

“Allan is well recognized and highly respected across our profession. We felt very lucky to have him as a keynote speaker for our NJCPA Convention & Expo in Atlantic City. His presentation (“Growing Professionally and Common Success Characteristics of Great Leaders and High Performers”) was rated 4.6 out of 5, which is quite high for our audience! The material truly resonated with our audience of accounting practitioners, firm partners and C-suite professionals, many of whom are looking for expert advice on how to develop a successful plan to grow professionally. In his informative session, Allan espoused the power of goal setting, and gave the audience actionable suggestions on how to become high performers and great leaders.” **Ralph Thomas, CEO & Executive Director, New Jersey Society of CPAs**

“Our annual SYNERGY Users’ Conference draws 1,500 practitioners from firms of all sizes across the country. Finding an engaging keynote speaker who is also part of the profession and can relate directly to our audience is never easy, except when Allan Koltin is available. Allan gave an outstanding presentation that included recent and relevant data points, and that was very, very well received by our customers. It is always a joy and a pleasure working with Allan.” **Jon Baron, Managing Director – Professional Segment, Tax & Accounting Professional, Thomson Reuters**

"Allan stands out in an increasingly crowded field of consultants to the accounting profession. Whether speaking to a national conference of 1,000+, or an intimate group of 50, Allan effectively synthesizes his decades of experience helping premier CPA firms large and small and provides actionable insights that inspire the best performing firms to do even better. His self-deprecating humor and sharp wit make his interactive sessions memorable, and leave his audiences wanting more." **Michael Horwitz, Executive Director, BDO Alliance USA**

"Allan was key to success of our recent Nexia International North/Central America regional meeting. His understanding of the changes taking place in the accounting profession and the way he keeps his finger on the pulse of marketplace is extremely impressive. All of our delegates rated Allan's session as a 5 Star performance and a must have for future meetings!!" **Lawrence J. Chastang, CPA, TEP, Chairman Global Advisory Services, CliftonLarsonAllen LLP & Regional Chairman, Nexia International North/Central America**

"I want to extend my most sincere Thank You for speaking at our NYSSCPA NextGen Conference! You were gracious from our first conversation through dealing with all the traveling hassles involved in just getting you to the conference. You received an average rating of 4.7 out of 5.0 from our post-conference evaluations - which for us is quite high! Again, I cannot thank you enough and will absolutely keep you in mind for future events." **Nikki Mannes, Conference and Compliance Associate, New York State Society of CPAs**

"Allan is not only one of the most well recognized and respected consultants in the accounting industry but also incredibly warm and engaging and has an incredible way of creating energy in a room – no matter how large! Allan has been a consultant for our CPA Advantage Program for nearly a decade and is, without a doubt, the highlight of our CPA Symposium as keynote speaker year after year." **Kathryn Drumheller, Marketing Manager – Marketing & Business Development, National Life Group**

"The keynote of CPAmerica's Leading Partner Retreat was presented in an outstanding manner by Allan Koltin who addressed a wide range of topics effecting firms that have committed to remaining independent and growing. His empathetic method and vast experience in conducting firm partner retreats allowed Allan to share successes and best practices to nearly all issues facing mid-sized firms in the effort to remain viable. Allan also spoke to our Large Firm Group the day before our Annual meeting and he provided them relevant insights effecting firms of their size. I would wholeheartedly recommend Allan Koltin to you for your association keynote." **Alan E. Deichler, President, CPAmerica International**

"It was the first time we have had the pleasure of Allan speaking to our organization. It certainly will not be the last. His experience and depth of industry knowledge was more than evident to our members. He was one of the highlights of our conference and his authenticity is what set him apart from other speakers. Any organization would benefit from his entertaining and direct style." **Adam Crowson, CEO, GGI | Geneva Group International**

"Allan's keynote address at our annual customer conference was the third time we've invited him to speak to our group. As in the past, he surpassed our expectations and truly delivered an informative and inspiring message. Allan's content is on-point, and he connects very personally and effectively with accountants and tax professionals." **Scott Fleszar, VP – Product Management, Tax & Accounting Professional, Thomson Reuters**

"Allan presented on 2 topics at our International Conference in Boston. He came highly recommended and did not disappoint. Indeed, such was the interest shown that there were several follow ups from delegates immediately afterwards seeking his further advice – both to legal and accounting firms. We will certainly look to have Allan speak again." **Tim Wilson, Chief Executive, MSI Global Alliance**

"Allan has spoken at several conferences I have attended over the years and at each one I hear myself thinking: he's at the top of his game, can't get any better. But he proves me wrong every time. As a keynote speaker at our recent Practice Management Conference, Allan raised the bar yet again with a level of professionalism and knowledge unparalleled in the industry. Our members left the meeting feeling enthusiastic and empowered, looking forward to sharing the information when they returned to their respective firms. Thank you, Allan, we look forward to having you back again and again." **Michael Parness, President, CPA Associates International**

"I would like to thank you personally and on behalf of the Board of Directors of Russell Bedford International, for taking the time to attend our annual conference in New York and for delivering such a thought-provoking talk. From discussions with my fellow delegates, your presentation made an invaluable contribution to the overall success of our conference." **William F. Rucci, Jr., Chairman, Russell Bedford International**

“When we book Allan for a conference, we know we are guaranteeing our attendees top tier education from a knowledgeable industry leader. The presentation Allan gave at our Managing Partners conference was not only full of useful insights, but was also delivered in an engaging and highly relatable manner. The Managing Partners in attendance knew they were hearing from someone who knows their industry inside and out and that they can rely on the insights he provides. This was not the first conference we’ve booked Allan for, and it will most certainly not be the last!” **Maureen Dillmore, USA Executive Officer – DFK International**

“Allan is well recognized and highly respected across our profession. We knew his keynote address would be a highlight of our annual customer conference, and Allan certainly did not disappoint. His material was meaningful to so many attendees I spoke with following his address, and his presentation was amazingly fresh, warm and engaging. Allan helped make our conference a great experience for our customers.” **Steve Mendelsohn, Managing Director – Knowledge Solutions, Tax & Accounting, Thomson Reuters**

“Allan is a favorite speaker with our membership because he brings valuable insights around industry issues and emerging trends that enable members to leave meetings and conferences with something to act upon. His years of experience in providing counsel and advice to members allows him to offer perspective in a number of areas and comfortably respond to pressing issues of the day, not just those on a pre-determined agenda.” **Tony Szczepaniak, CEO, Moore Stephens North America**

“Allan is, without a doubt, one of the top thought leaders of our profession. When it comes to the best practices of high performing firms, he has an inspiring and motivational message that all need to hear.” **Karen Kehl-Rose, President, The Leading Edge Alliance**

“Kreston ran sessions on the leading practice management areas over a two-day period in Beijing to an audience drawn from our 40 countries. Allan was the perfect presenter – each session was lively, packed with valuable takeaway tools, and totally appreciated by the global audience.” **Jon Lisby, CEO, Kreston International**

“Allan Koltin was our keynote speaker at our annual global congress and was outstanding. Engaging, charismatic and fluent, here is a man at the top of his game and our delegates hugely enjoyed and benefitted from the experience. He will add status to any gathering of accounting professionals.” **Kevin Arnold, CEO, Nexia International**

“Allan Koltin’s workshop session at the Moore Stephens Europe Spring Conference was a real highlight. Allan’s delivery combined his expertise, insight into and knowledge of our chosen topics (current trends in firm growth; talent attraction and retention; best practices in leadership and management; performance-based partner compensation; mergers & acquisitions) with putting great questions to the audience to check understanding and get us thinking in small groups. This produced a highly interactive and thought-provoking session in which one topic flowed smoothly into the next, capturing and maintaining the full attention of the audience. The member firm partners confirmed they got a lot of value from this session.” **Chris Rawden, Executive Director, Moore Stephens Europe**

“Allan Koltin is our go-to speaker for all audiences. He has spoken to our members on a wide range of management topics and as a keynote before our international group of accounting and law firm leaders. In every case he has educated and entertained. He has our praise and our respect.” **Robert Sattin, President, TIAG**

“Allan spoke at our National Leadership Conference and was an outstanding presenter. He not only engaged all of our participants, he educated and entertained them all at the same time. His knowledge of our industry is vast and his ability to present this to an audience is unsurpassed.” **Richard David, Executive Vice President and COO, UHY Advisors and Board Member of UHY International**

“Our delegates gave Allan very high scores as evidenced by such comments as; “In the future, more of this!” and “A very useful session and could have been twice as long!” **Rob Tautges, CEO, HLB International**