

MGO merges in J. Arthur Greenfield & Co.

By Michael Cohn | October 31, 2023, 10:36 a.m.

Macias Gini & O'Connell LLP, a Top 50 Firm based in Los Angeles has expanded its presence in LA by adding J. Arthur Greenfield & Co. LLP.

As part of the deal, JAG's four partners and 20 team members are joining MGO. Financial terms of the deal were not disclosed. MGO ranked No. 47 on Accounting Today's 2023 list of the Top 100 Firms, with \$134 million in annual revenue and over 60 partners and approximately 700 employees.

JAG dates back to 1920 and focuses on serving high-net-worth individuals and family groups, closely held businesses, and philanthropic organizations in the LA area.



Los Angeles

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"With complementary service lines and a shared commitment to providing team members with an amazing experience, we're proud to welcome everyone at JAG to MGO," said MGO CEO and managing partner Kevin O'Connell in a statement Tuesday. "We are headquartered in Los Angeles and thrilled to be able to bolster our capabilities in a great market with a firm of great people that shares our values. This is another step as we continue to grow through strategic combinations with leading firms across key markets in the United States."

Former JAG team members will join MGO's Century City office at the end of the year.

MGO provides assurance, international tax, state and local tax, advisory, trust and estate planning, strategic planning, wealth management, and family office services.

"MGO is a likeminded partner, sharing our culture, values, and a commitment to delivering tailored and impactful financial solutions," said JAG partner Helen Wu, who will join MGO as a tax partner, in a statement. "Our high-net-worth clients will experience a seamless transition and continue to receive the dedication they have come to expect from us, coupled with a broader range of services to successfully manage their financial future. We are thrilled to join MGO's incredible group of professionals and to plug into MGO's state of the art technology platforms."

Koltin Consulting Group CEO Allan D. Koltin advised both firms on the combination. He said, "With JAG, MGO continues its journey of finding 'Best in Class' CPA and advisory firms to combine with, as JAG is a preeminent tax and high-net-worth firm in Los Angeles and was sought after by many suitors," he said in a statement. "It chose MGO for the firm's entrepreneurial culture and its depth of resources and service offerings for its clients."

Last year, MGO expanded its presence in New York by adding Nussbaum, Berg, Klein & Wolpow, CPAs LLP, a firm with offices in Manhattan and Long Island, and in California by adding Eckhoff & Company CPAs and Advisors in San Rafael. In 2019, MGO acquired Schwartz & Co. in New York.