

In Addition to our Practice Management Consulting, Partner/Leadership Retreats and M&A/Talent Representation Services

If you're looking for a thought-provoking, motivating speaker for your next conference, firm meeting or virtual meeting, Allan can speak on any of the following topics:

- Best in class firms
- High performing partners/firms
- Partner compensation
- Governance & firm management
- Leadership succession
- Building a consulting niche
- Recruiting and growing talent
- Firm profitability
- Strategic planning
- Firm growth
- Succession planning/M&A

Many of the Top 500 CPA firms come to KCG for our depth of knowledge and breadth of services.

AICPA ENGAGE CONFERENCES

M&A Best Practices for Both Acquirer and Acquiree

2023 over-all scores	Instructor's Presentation Skills	Instructor's Knowledge of the Subject
	4.80	4.89

Everything You Wanted to Know About PE & the Accounting Profession

2023 over-all scores	Instructor's Presentation Skills	Instructor's Knowledge of the Subject
	4.91	4.60

Current State of Mergers & Acquisitions in the Profession

2022 over-all scores	Instructor's Presentation Skills	Instructor's Knowledge of the Subject
	4.65	4.76

How To Assess Your Firm's Future Succession Paths - Internal vs External

2021 over-all scores	Instructor's Presentation Skills	Instructor's Knowledge of the Subject
	4.66	4.79

Most Profitable Niches and How to Build Them

2019 over-all scores	Instructor's Presentation Skills	Instructor's Knowledge of the Subject
	4.87	4.93

"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**

"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**

"Allan Koltin was the highlight of the 2022 Rootworks Inspire Conference."

Succession Planning Done Right

Instructor's Presentation Skills	Instructor's Knowledge of the Subject	Delivery of the Session Learning Objectives
97%	97%	90%

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Practice Management and Growth | Mergers and Acquisitions | Talent Representation