

## Allan D. Koltin, CPA, CGMA

*"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



*"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 strategic planning retreats for firm leadership and partners. His specialties include strategy, governance, profitability, compensation, growth, human capital, succession, and mergers and acquisitions.

For the last twenty-four years, Allan has been named by *Accounting Today* as one of the Top 100 Most Influential People in the accounting profession. In 2023, he was listed as the "Second Most Influential" in the profession. For the past twenty-three years, Allan was voted as one of the Most Recommended Consultants in the "Annual Survey of Firms" conducted by *INSIDE Public Accounting*. For the past decade, Allan has been named by *CPA Practice Advisor* as one of the Top 25 Thought Leaders in the profession and, in 2016, they also inducted Allan into the Accounting Hall of Fame. Allan was 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 CNN, WGN and FOX TV and has been quoted frequently in 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 CEO of PDI Global, which was the largest provider of marketing products and services for CPA firms. Allan sold PDI Global to H&R Block in 1998, buying it back in 2008, and then selling it to Thomson Reuters in 2011. Prior to that, Allan was a partner in the Chicago-based CPA firm of FERS, where he served as leader of the Investment Banking and Law Firm Services 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 20 years, The Advisory Board hosted the Winning Is Everything Conference. Allan has served on various advisory boards, included SS&G, Outsource Partners International (OPI), the Association for Accounting Marketing (AAM), The National Association of Certified Valuation Analysts (NACVA), and H&R Block (HRB Business Services).

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 Advisor*, the *Journal of Accountancy*, *Accounting Today*, *Inside Public Accounting* and *Law Firm Management*.

Allan attended both the University of Wisconsin – Madison and – 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.

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