

If you're looking for a thought-provoking, inspiring speaker for your next conference, retreat or firm event,

**Allan's new sessions for 2024 are:**

- Leadership Lessons I Wish I Knew Before I Was a Leader.
- State of the Accounting Industry – Changes, opportunities and challenges
- The War on Talent – Strategies for recruiting, retaining and growing talent
- How Effective is Your Leadership and Decision Making? – Best practices of high performing firms
- Current Trends in CPA Firm M&A and Private Equity – What will happen in the future?
- The Secret Sauce of Best in Class Firms – What makes them so special?
- Common Success Characteristics of High Performing Partners and Leaders
- Can Firms Be Uber Profitable and Still Invest in Building the Firm of the Future?



**Voted "Top 100 Most Influential in the Profession" from 2000 – 2023 and ranked #2 Most Influential in 2023."**

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

**AICPA ENGAGE CONFERENCES**

1-5 SCALE (5 highest)

*M&A Best Practices for Both Acquirer and Acquiree*

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

*Everything You Wanted to Know About PE & the Accounting Profession*

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

*Current State of Mergers & Acquisitions in the Profession*

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

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

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

*Most Profitable Niches and How to Build Them*

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

**2023 TEXAS SOCIETY OF CPAS LEADERSHIP COUNCIL PRESENTATION**

*State of the Accounting Industry/Best Practices of High Performing Firms.*

Instructor's Presentation Skills	Instructor's Knowledge of the Subject
<b>97%</b>	<b>97%</b>

"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
<b>97%</b>	<b>97%</b>

"At our 2023 World Conference, Allan presented a topic that leveraged and highlighted the depth and breadth of the impact he has on our profession. Leveraging his experience and engagement with many firms across the profession, he shared a Top 10 Leadership Lessons message centered on the theme of, "What I wish I knew then". It was a member favorite session that included not only US members, but those from across the globe. The community was abuzz with the relevancy and poignancy of the points he made. It provided participants with a number of nuggets to consider how they could accelerate development for their upcoming leaders. Well done Allan!"

**Tony Szczepaniak, CEO  
LEA Global**

"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**

"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**

"CLA had the pleasure and honor to have Allan Koltin join us at our Owner Promise Meeting. 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, Former CEO,  
CliftonLarsonAllen re Owner Promise Meeting**

**ALLAN D. KOLTIN, CPA, CGMA, CEO**

**(312)805-0307 cell**

**akoltin@koltin.com**

**www.KOLTIN.com**

Practice Management and Growth | Mergers and Acquisitions | Talent Representation