

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

Allan's new sessions for 2025 are:

- Success Strategies For Remaining An Independently Owned CPA Firm
- Leadership Lessons I Wish I Knew Before I Was a Leader.
- State of the Accounting Industry – Changes, opportunities and challenges
- The War For Talent – Strategies for recruiting, retaining and growing talent
- Partner Compensation – how to motivate your partners to achieve their goals
- 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
- Is Your firm A Country or a Country Club – The discipline and focus of America's most profitable CPA firms



Voted "Top 100 Most Influential in the Profession" from 2000 - 2024 and ranked #2 Most Influential in 2023 and 2024."

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

"I have hired Allan Koltin for various speaking engagements for conferences and meetings for almost 20 years. Allan is one of the most knowledgeable in the profession on firm governance and partner issues. What I like about his speaking style is his ability to take these topics and make them easily understandable and relatable. He has a talent for connecting with the audience and giving them those "aha" moments necessary to advance their practice. I have used Allan with emerging partners, to senior partners, firms small and large. He has the ability to adjust to the audience he's speaking to the most. I had him speak to senior managers and new partners for years on partner compensation. A topic that in theory the audience had no control over changing. Allan was able to educate the audience on partner compensation overall but then connect the dots on how they could do better in their personal contribution to the firm and work on growing partner comp for all. Truly amazing and always one of the highest rated speakers."

**Mark Koziel, CPA, CGMA, CEO, AICPA
(former President & CEO Allinial Global)**

"Allan is a once-in-a-generation leader within the accounting profession. He is both thoughtful and thought-provoking in his observations, providing counsel to many of the industry's top performing Firms. Well-known for his consulting on partnership matters, M&A and running profitable CPA firms, Allan was sharing even greater insights on what it takes to be successful. He was entertaining and self-deprecating in his recent keynote "Leadership Lessons I Wish I Knew Before I was a Leader."
"Whether you are a professional services firm, a wealth management firm, or a private equity investor, these lessons are seamlessly transferable. I've been captivated by Allan's insights for the past 25 years. In fact, I've never heard Allan speak when I wasn't inspired."

**Michael Horwitz, Executive Director,
BDO Alliance USA**

"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 was highly effective as one of our keynote presenters at Rainmaker's our Super Conference. 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 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 one of the most requested and highly rated speakers at our conferences. 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 partnership, knowledge sharing, and expertise.

**Ellen O'Sullivan, Executive Director
Moore North America**

"Allan spoke at our North America Members Conference in Denver and was a big hit with the attendees! Our unique combination of law and accounting member firms appreciated his universal insights in the best practices of highly successful firms, partners, and leaders. Whether it was his comments on growth, leadership, profitability, partner compensation, talent, or succession, everyone in the room left with many useful takeaways to implement into their firm or practice."

**Susan Greene, Director of Member Relations – Americas
MSI Global Alliance**

"Allan Koltin delivered an incredibly insightful and thought-provoking presentation at our Baker Tilly Partners Conference. His deep knowledge of the accounting and advisory industry, coupled with his engaging, authentic, and often humorous delivery, kept our entire audience captivated from start to finish. Allan provided a comprehensive overview of the current state of our profession, though went further to offer a forward-looking perspective that challenged us to rethink how we approach the key issues of technology, talent retention, and client service in a rapidly changing marketplace. It was no wonder that his presentations on high-performing firms and partners were the highest-rated presentations during our conference. He was a huge hit!"

**Ben Lloyd, CEO
Baker Tilly (Canada)**

"TAG Alliances has engaged Allan Koltin for multiple International Conferences and our Managing Partner & Firm Leaders Summit. Most recently, in Spring 2023, Allan delivered a keynote address on "High Performing Firms and Partners" to our delegates, comprised of accountants, lawyers, and strategic partners from around the world. This was a dynamic presentation that featured Allan's unparalleled industry knowledge, but what made it even more impactful was Allan weaving into his presentation facts and stories from many of our members in attendance. While many consultants offer a canned, one-size-fits-all speech, Allan works hard to deliver a bespoke and unique tailor-made experience ensuring your audience will be engaged and inspired."

**Richard Attisha, President & CEO
TAG Alliances**

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