

Baker Tilly to buy Berkowitz Pollack Brant

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Baker Tilly

Baker Tilly, a Top 10 Firm based in Chicago, plans to acquire Berkowitz Pollack Brant Advisors + CPAs, a Top 75 Firm based in Miami.

The deal will expand Baker Tilly's footprint to South Florida and its existing presence on the East Coast.

Financial terms of the deal with Berkowitz Pollack Brant were not disclosed. Baker Tilly's revenue as of June 3, 2025, was \$3 billion across its advisory, tax and assurance practices, and its headcount was 11,000 professionals, including 1,000 principals. Baker Tilly has over 100 offices across the country and internationally. Berkowitz Pollack Brant's revenue for 2025 is \$115 million. BPB has 340 team members,

plus 32 principals, with offices in Miami, Fort Lauderdale, Boca Raton and West Palm Beach, Florida, and New York City. Baker Tilly ranked No. 11 on *Accounting Today's* 2025 list of the Top 100 Firms, but combined with Moss Adams it would have ranked in sixth place.

Upon completion of the deal, BPB CEO Joseph Saka will join Baker Tilly as managing principal – Florida. "This is the right move at the right moment for our firm," Saka said in a statement Monday. "Our clients operate across markets and borders, and they're looking for advisors who can match that reach. Joining Baker Tilly gives us the platform, the talent and the technology to support them in a bigger way while keeping the personal relationships and South Florida roots that define us."

Berkowitz Pollack Brant dates back to 1980 and specializes in real estate taxes and advising high-net-worth individuals and families in the U.S. and overseas. Its multilingual team speaks nearly a dozen languages and will increase Baker Tilly's ability to serve clients with cross-border needs.

BPB founder and executive chairman Richard Berkowitz hailed the combination. "We are enthusiastic about combining our complementary cultures with the sixth largest firm in America," he said in a statement. "Our team will have expanded resources to assist our clients in accomplishing their goals, and we will have enhanced opportunity to recruit outstanding professionals to grow our firm."

The deal fits in with Baker Tilly's strategy of connecting important East Coast markets, thanks to BPB's presence in Miami and New York City and specialists in tax consulting, assurance, risk, CFO advisory and digital services.

"This combination reflects who we are and where we're headed as a firm," said Baker Tilly CEO Jeff Ferro in a statement. "Berkowitz Pollack Brant brings exceptional talent, deep regional roots and capabilities that strengthen our ability to serve clients across the East Coast and beyond."

Baker Tilly is part of the Baker Tilly International network, based in London, which reported \$5.6 billion in worldwide revenue in 2024. Baker Tilly has done several acquisitions since receiving private equity funding in February 2024 led by Hellman & Friedman and Valeas Capital Partners. Earlier this year, it merged in Top 75 firm Moss Adams in Seattle, Regional Leader KraftCPAs in Nashville, CironeFriedberg, in Bethel, Connecticut, and Hancock Askew, a Regional Leader based in Savannah, Georgia. Last year, Baker Tilly merged in Seiler LLP, a Top 75 Firm based in Redwood City, California.

"Berkowitz Pollack Brant is a firm clients trust because they know the market, they know the community and they know the work," said Fred Massanova, chief growth officer at Baker Tilly, in a statement. "Combining that depth of insight with Baker Tilly's national scale creates a level of capability and perspective that is increasingly essential in today's environment. Together, we can help clients move faster, make better decisions and take on opportunities with even more confidence."

Koltin Consulting Group CEO Allan Koltin advised both firms on the transaction. "This combination works because both firms see the same opportunity in the market," he said in a statement. "Baker Tilly gains a proven leader in South Florida, and Berkowitz Pollack Brant gains a national platform to accelerate its growth. Clients ultimately benefit from deeper expertise and expanded capabilities."

Prior to the private equity funding, in 2022, Baker Tilly merged in Henry + Horne in Tempe, Arizona, True Partners Consulting in Chicago; Management Partners in Cincinnati and San Jose; Bader Martin in Seattle; Orchestra Healthcare in West Palm Beach, Florida; and Vanilla, based in the United Kingdom. In 2021, it added MFA Companies in Boston; The Compliance Group in Carlsbad, California; Arnett Carbis Toothman in West Virginia; AcctTwo in Houston; and Margolin, Winer & Evens in New York.