

PHIL WHITMAN

*PRESIDENT/FOUNDER,
WHITMAN TRANSITION
ADVISORS*

Helping CPA Firms Grow! CPA Firm Advisor, M&A Facilitator, Provider of Talent, Helping CPA Firms to help their Clients through our C Suite IMPACT group of Companies

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BIO

I am proud to be the CEO and President of the largest consulting firm that works exclusively with CPA firms in the Nation, no, perhaps the World! I started my career as an auditor at Price Waterhouse, now PWC, and was a tax guy at a large international CPA firm. Ultimately, one of my clients, a law firm, convinced me to join their team as their Chief Operating Officer, and so, my practice management career was born. After six years of running law firms in NYC, I transitioned over to the CPA firm arena, where I worked at a Real Estate boutique, then a Health Care and Not-for-Profit specialty firm, and ultimately, a then Top-25 firm in the Nation.

For the first six years, life at Whitman Business Advisors was just me and a stay at home mom. In 2015, joined by David Wolfskehl, WBA grew to 15 consultants. In January of 2022 we merged in our largest competitor, Transition Advisors, and became Whitman Transition Advisors. One day I woke up and realized that our clients, CPA firms, was the keeper of the "Golden-Goose" and as the Trusted Advisor could significantly influence their clients. So today, not only are we consulting with our CPA firm clients, through the C Suite group of companies, of which I am a founding partner and Executive Chairman, we are now helping our CPA firm clients, help their clients.

REACH OUT IF YOU NEED HELP WITH:

- MERGERS AND ACQUISITION
- TALENT ACQUISITION
- PRACTICE MANAGEMENT CONSULTING
- LEAD GENERATION
- PARTNER RETREATS
- TRAINING & COACHING

