

TERRENCE PUTNEY

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PARTNER

Leading CPAs and their firms through transition with succession strategies and M & A facilitation.



BIO

I HAVE OVER 40 YEARS OF EXPERIENCE IN THE CPA PROFESSION INCLUDING AS MANAGING PARTNER OF A MID-SIZED LOCAL CPA FIRM, SENIOR MANAGING DIRECTOR OF M & A FOR A TOP 10 NATIONAL CPA FIRM, AND AA A CONSULTANT TO THE PROFESSION FOR THE PAST 18 YEARS.

I HAVE BEEN NAMED ONE OF ACCOUNTING TODAY'S TOP 100 MOST INFLUENTIAL PEOPLE IN ACCOUNTING SINCE 2012. I HAVE ASSISTED HUNDREDS OF CPA FIRMS WITH CREATING GROWTH THROUGH M & A AND SUCCESSION BOTH THROUGH INTERNAL AND EXTERNAL STRATEGIES.

CONTACT ME DIRECTLY TO DISCUSS HOW I CAN ASSIST YOU AND YOUR FIRM: 913-766-0877.

FEEL FREE TO CONNECT WITH ME BY EMAIL AT [TPUTNEY@WHITMANTRANSITION.COM](mailto:tputney@whitmantransition.com) OR LINKED IN.

REACH OUT IF YOU NEED HELP WITH:

- MERGERS AND ACQUISITION
- INTERNAL SUCCESSION
PLANNING FOR PARTNERS
- ASSISTANCE WITH
DEVELOPING OR MODIFYING
AN OWNER AGREEMENT FOR
YOUR FIRM
- PARTNER RETREATS

