

# A tremendous leader of people A top expert in CPA firm growth and management

Phil Whitman's breadth & depth of experience speaks volumes to an audience of managing partners across North America



For nearly 20 years, Phil Whitman has advised firms across North America, working with top management in overseeing day-to-day operations to ensure efficiency & profitability.

**NOW he shares his inside expertise through engaging, entertaining, high-impact speaking engagements.**

**BOOK PHIL FOR YOUR NEXT  
RETREAT OR ANNUAL MEETING.**

## Hot Topics for National CPA Firms & Managing Partners

- ▶ Are You a Six-Pack CPA Firm? A Practice Management Boot Camp Primer
- ▶ Lean M&A: Critical Factors to Get to the Finish Line Faster
- ▶ Succession Planning: Options to Maximize the Monetization of Your Lifetime of Work
- ▶ Growth With & Without Merging
- ▶ Post Merger Integration: The Deal is Signed, Now What? How to Make One + One = Wow!
- ▶ CPA Firm of Our Future! A Futurist View of the Profession
- ▶ The Five Pillars of Practice Growth – Generate a Flood of Profits in Good Times & Bad
- ▶ Anatomy of a CPA Firm Merger Deal
- ▶ Getting Organized to be the Best!
- ▶ Art of the Merge: Ten Steps to Success - CPA Firm M&A Done Right!



**Phil's presentations can be customized to fit your needs.**

"Philip Whitman, CPA is an exemplary Thought Leader and true visionary for the CPA Firm industry." ~ Peter J. Scalise, Federal Tax Credits & Incentives Practice Leader for the Americas at Prager Metis CPAs, LLC

"I would not hesitate in having Phil return as one of our speakers... His level of professionalism is what stood out most..." ~ Adam Crowson, CEO North America, GGI | Geneva Group International

"Phil has a remarkable depth of knowledge of the accounting industry..." ~ Phillip Laycock, Partner at Grassi & Co.

**Get Phil on your side!**  
**Call today for best availability.**

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