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exit strategy. Relatively few buyers or sellers have much merger experience, yet these deals will require some of the most important decisions in their professional ...

Aug. 08, 2016

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CPA Firm Mergers: Your Complete Guide

Marc Rosenberg, CPA

Two words describe the state of the merger market to a tee: EVERYONE’S TALKING.

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- Keys to successful mergers
- 21 steps in merger process (ALL are critical)
- How to assess cultural fit
- The 15 most important merger terms
- Benefits of merging upward
- Why buying a firm for one times fees is a steal
- What larger firms should expect to see from smaller firms & vice versa
- How to negotiate a merger – from both buyer and seller view
- 14 things the Letter of Intent should address
- 34 critical questions to ask
- 18 types of data that should be reviewed
- How do perform due diligence work
- Best practices from MPs who did mergers
- Merger of two solos-critical negotiation issues

The book costs \$195 and is [available for order online](#).

Marc Rosenberg is a nationally known consultant, author and speaker on CPA firm management, strategy and partner issues. President of his own Chicago-based consulting firm, [The Rosenberg Associates](#), he is founder of the most authoritative annual survey of mid-sized CPA firm performance statistics in the country, The Rosenberg Survey. He has consulted with hundreds of firms throughout his 20+ year consulting career. He shares his expertise regularly on The Marc Rosenberg Blog.

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