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## Shepard Schwartz & Harris

Citrin Cooperman has announced the establishment of their first Midwest office through the acquisition of Shepard Schwartz & Harris ("SSH"), a Chicago based firm.

**Isaac M. O'Bannon** • Jul. 18, 2022



Citrin Cooperman has announced the establishment of their first Midwest office through the acquisition of Shepard Schwartz & Harris ("SSH"), a Chicago based firm focused primarily on privately held businesses and their owners with specialties in the real estate, construction, and manufacturing and distribution industries. Shephard Schwartz & Harris joins Citrin Cooperman with ten partners and over 50 staff members.

"To be the first Citrin Cooperman office in Chicago is really a unique experience," Office Managing Partners Mary Fuller and Stan Lazar shared in a joint statement. "We are excited to introduce the Chicago and Midwest markets to the Citrin

Cooperman resources and services and continue to help our clients with their

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conversation we've had, including the negotiations. I am so happy that we are finally together, and we look forward to bringing our vast array of services to their clients and to the Midwest."

Founded by Irving Shepard and Morris Schwartz and later joined by Jerome Harris, SSH has been an integral part of the Chicago business community since 1935. A highly talented tax, accounting, and business advisory firm designed for the needs of privately held companies, SSH helped to shape the Chicago skyline as we see it today through their involvement as a key player in the real estate and construction industries throughout Chicago and the Midwest. Mary Fuller and Stan Lazar will be co-managing partners of the newly established Citrin Cooperman office in the prior SSH downtown Chicago location.

Allan D. Koltin, CEO of Koltin Consulting Group, who advised both firms on the deal, commented, "Citrin Cooperman is entering the market with all the support and resources of a national firm combined with the personal and local knowledge of a Chicago-based enterprise. SS&H was sought after by every national and regional firm in Chicago for a merger. They fit the description of 'Chicago's Best' in terms of talent, entrepreneurship, and leadership and are blessed to have a roster of some of Chicago's most successful businesses and high net worth individuals."

The non-attest assets of SSH will be joining Citrin Cooperman Advisors LLC. Concurrent with this transaction, the attest assets will join Citrin Cooperman & Company, LLP.

Firm Management

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