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and ultra-high net worth clients and their closely held businesses.

Isaac M. O'Bannon • Aug. 01, 2022



Citrin Cooperman has acquired Untracht Early, a New Jersey-based firm with over 150 partners and staff, effective August 1, 2022. Since beginning in 1993, Untracht Early has developed a strong team specializing in alternative investments, comprehensive tax, and business solutions primarily in the financial services and alternative investments industries. They also have deep expertise in high-net-worth individuals and family office catering to C-suite owners throughout the world.

“Joining a firm that has the same goals, the same mindset, the same core values, and a similar culture and approach to high-touch client service is an ideal match,” said co-founders David Untracht and Tracey Early, in a joint statement. “Having grown from a firm of four people to a firm of over 150, it is exciting to be taking the next step by joining a firm of 1,600 which expands the breadth of services and resources we

can now offer to our clients. Our team is eager to explore all the opportunities Citrin

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Besides their technical skills, Tracey, David, and many of their people will play a significant role in our firm's leadership."

Untracht Early's strong foundation in hedge fund and alternative investment work, dovetails perfectly with Citrin Cooperman's firmly established financial services practice. Additionally, Untracht Early also brings a significant individual tax practice focused on serving high and ultra-high net worth clients and their closely held businesses. Ranked as an *INSIDE Public Accounting* Top 200 Firm since 2010, Untracht Early is a member of the CEO Action for Diversity & Inclusion™, the largest CEO-driven business commitment to advancing diversity and inclusion in the workplace.

"It's really a wonderful opportunity for both Citrin Cooperman and Untracht Early," said Allan D. Koltin, CEO of Koltin Consulting Group, who advised both firms on the deal. "I have worked with both firms for years and their cultures, people, and dedication to excellence are perfectly matched. I am very confident they will accomplish great things together."

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

Firm Management • Mergers and Acquisitions

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