

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us


servicing high-net-worth and other private clients.

**Jason Bramwell** • Jan. 10, 2024



Top 30 accounting firm PKF O'Connor Davies has acquired Silver Springs, MD-based Robert Philipson & Co., an accounting, tax, and management advisory firm that specializes in serving private clients through sophisticated tax services.

Financial terms of the deal, which became official on Jan. 1., weren't disclosed. Managing Partner Richard Philipson, partners Samuel Philipson and Diane Porter, and the firm's employees joined the staff of PKF O'Connor Davies last week and remain in their current Silver Spring office.



Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

longevity has solidified its reputation for superior expertise and unparalleled client service,” Kevin Keane, executive chairman at Harrison, NY-based PKF O’Connor Davies, said in a statement. “With the addition of Richard and his team, our clients and our organization now benefit from this nearly 100-year history of excellence. Their legacy, offerings, and approach make them an exceptional fit, and I look forward to the many ways they will strengthen our work, especially with private clients.”

Established in 1925, Robert Philipson & Co. has regularly provided high-net-worth individuals and other private clients with comprehensive, individualized tax offerings. The firm’s senior staff and partners have extensive expertise in tax planning and preparation, IRS representation, international taxation, and estate and trust taxation. In addition, the firm provides wide-ranging, personalized accounting and consulting services, including income, estate, financial, retirement, and succession planning, and support in the areas of mergers and acquisitions, marital planning, and litigation.

“For nearly a century, our firm has never wavered from its mission to provide clients with the services and support they need to achieve their tax and accounting goals,” Richard Philipson said. “As our firm looks to the future, we see no greater partner than PKF O’Connor Davies, whose legacy has positioned the organization as a globally recognized leader in the accounting industry.”

With this transaction, PKF O’Connor Davies now has 18 U.S. offices throughout Connecticut, Florida, Maryland, Massachusetts, New Jersey, New York, and Rhode Island.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us