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Rank	Firm (Ranking in 2007) • name • address • Web site	L.A. County Staff (current/year ago) • accounting prof. <sup>1</sup> • total prof. <sup>2</sup> • CPAs	Revenue <sup>3</sup> (county/total) • 2007 • 2006	Industries Served (partial list)	Services Offered (partial list)	Profile • headquarters • year est. • offices (county/total)	Top Local Executive • name • title • phone
41	<b>Meloni Hribal Tratner LLP (39)</b> 5950 Canoga Ave., Suite 350 Woodland Hills 91367 mhtcpa.com	31/29 32/29 20/18	WND/WND WND/WND	construction, entertainment, financial services, manufacturing, manufacturing and dist., media, real estate, retail	accounting, audit, business management, estate planning, litigation support, m&a, royalty compliance, taxation	Los Angeles 1997 1/1	Gary V. Meloni partner (818) 587-3730
42	<b>Kirsch Kohn &amp; Bridge LLP (40)</b> 15910 Ventura Blvd., Suite 1100 Encino 91436 kkbcpa.com	29/28 29/28 20/20	5.2/5.2 5/5	construction, legal, manufacturing and dist., non-profit, real estate, retail	accounting, audit, estate planning, forensic, litigation support, m&a, taxation, 401(k) audits	Encino 1960 1/1	Mel Kohn managing partner (818) 907-6500
43	<b>Sobul Primes &amp; Schenkel (43)</b> 12100 Wilshire Blvd., Suite 1150 Los Angeles 90025 spscpa.com	27/26 27/26 15/15	WND/WND WND/WND	apparel, entertainment, health care, hospitality, legal, manufacturing and dist., real estate, retail, sports, technology	accounting, audit, business management, corporate finance, estate planning, financial advisory, information technology, personal financial planning, taxation, transaction	Los Angeles 1981 1/1	Richard J. Schenkel managing shareholder (310) 826-2060
44	<b>Martin Werbelow LLP (42)</b> 300 N. Lake Ave., Suite 930 Pasadena 91101 mwco.com	26/26 27/27 17/16	4/4 3.9/3.9	construction, financial services, health care, legal, manufacturing and dist., non-profit, real estate, retail, technology	accounting, audit, business management, estate planning, financial advisory, internal audit, litigation support, personal financial planning, taxation, transaction	Pasadena 1952 1/1	Steve Boyer managing partner (626) 577-1440
45	<b>Piazza Donnelly &amp; Marlette LLP</b> 3460 Torrance Blvd., Suite 150 Torrance 90503 pdmaccounting.com	26/21 26/21 18/14	WND/WND WND/WND	apparel, construction, financial services, health care, manufacturing and dist., real estate, retail, technology	accounting, audit, estate planning, forensic, m&a, taxation, transaction	Torrance 1998 3/3	Hank Parker partner (310) 540-4118
46	<b>Macias Gini &amp; O'Connell LLP (45)</b> 515 S. Figueroa St., Suite 325 Los Angeles 90071 mgocpa.com	25/23 28/28 8/7	3.1/19.9 2.6/16.6	financial services, health care, manufacturing and dist., non-profit, real estate, technology, government	accounting, audit, estate planning, financial advisory, m&a, risk management, taxation, performance, IT, financial and compliance consulting	Sacramento 1987 1/4	James V. Godsey partner (213) 286-6400
47	<b>Gorelick &amp; Uslaner CPAs (47)</b> 11620 Wilshire Blvd., Suite 800 Los Angeles 90025 gucpas.com	23/22 29/28 17/18	WND/WND WND/WND	construction, entertainment, financial services, legal, manufacturing, non-profit, real estate, retail	accounting, audit, business management, corporate finance, estate planning, financial advisory, litigation support, personal financial planning, taxation, valuation	Los Angeles 1946 1/1	Edward Gorelick president (310) 444-1889
48	<b>Edward White &amp; Co. LLP (46)</b> 21700 Oxnard St., Suite 400 Woodland Hills 91367 N/A	23/23 25/25 14/14	WND/WND WND/WND	construction, entertainment, hospitality, manufacturing and dist., media, non-profit, real estate, sports, technology, telecommunications	accounting, audit, business management, estate planning, financial advisory, forensic, internal audit, litigation support, m&a, royalty compliance, taxation, transaction, SEC reporting consulting	Los Angeles 1976 1/1	Edward White senior partner (818) 716-1120
49	<b>Maginnis Knechtel &amp; McIntyre (50)</b> 950 S. Arroyo Parkway Pasadena 91105 m-k-m.com	23/22 23/22 17/14	4.7/4.7 4.3/4.3	construction, entertainment, financial services, insurance, manufacturing and dist., non-profit, real estate, technology	accounting, audit, estate planning, litigation support, m&a, personal financial planning, taxation	Pasadena 1971 1/1	Arthur Thielen partner (626) 449-3466
50	<b>Rossi Daskocil &amp; Finkelstein LLP (48)</b> 400 Oceangate, Suite 1000 Long Beach 90802 rossillp.com	23/22 23/21 6/8	WND/WND WND/WND	apparel, construction, health care, legal, manufacturing and dist., non-profit, real estate, retail, technology	accounting, audit, corporate finance, estate planning, forensic, internal audit, litigation support, m&a, regulatory compliance, taxation, transaction	Long Beach 1984 1/1	Albert Rossi managing partner (562) 495-3325

WND - Would not disclose

To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, omissions and typographical errors sometimes occur. Please send corrections or additions on company letterhead to the Research Department, Los Angeles Business Journal, 5700 Wilshire Blvd., Suite 170, Los Angeles 90036. ©2008 Los Angeles Business Journal. This list may not be reprinted in whole or in part without prior written permission from the editor. Reprints are available from Wright's Reprints, (877) 652-5295.

<sup>1</sup> Number of employees doing accounting work, including CPAs, but excluding support staff.<sup>2</sup> Total number of professionals, including accounting professionals, but excluding support staff.<sup>3</sup> In millions.

Researched by David Nusbaum

# Succession Planning for CPA Firm Owners

## A True Story

BY CHRISTIAN PAYNE  
CEO Kellogg & Andelson

Ask yourself...where do you go when you wake up one day, the partners in the business you helped build are ready for retirement, but you still have years left to pursue your career?

Nancy Chandler spent over thirty years building her CPA firm with three other partners. Not only did she help build a client base, but she quickly became the face of the CPA community. Nancy served as Chair of the California Society of CPAs as well as President of the Los Angeles Chapter. It was no surprise when eventually she was nominated and awarded Women Business Owner of the Year for American Women's Society of CPAs.

While Nancy's career was peaking, her partners were looking toward retirement, something Nancy wasn't ready to realize. She considered the option of buying them out, but couldn't come up with the capital to do so, or the drive to be a sole practitioner. Hiring staff, already as it was, was a difficult task, so the option of bringing an employee up the ranks and mentoring them to become partner wasn't feasible. AICPA released their PCPS/MAP Top 5 Issues Survey, noting staffing as being the number one issue every year for CPA firms over the past ten years!

To preserve Nancy's ambition to remain a partner in a firm and uphold her active involvement in the CPA community, she and her partners decided to look for a CPA firm to merge into that would be flexible with each of their different wishes. Nancy wanted to continue her

career, one other partner wanted to work part time, and the others to retire immediately and be bought out of the practice. That's when Nancy and her partners met Kellogg & Andelson Accountancy Corporation.

Kellogg & Andelson created a succession plan for each of them; tailored to fit each of their retirement goals. Today, Nancy, a Vice-President at Kellogg & Andelson, has kept her same client base and added on more, and continues her involvement with the CPA community.

Recently polled by AICPA, 56% of firms surveyed said their firm would have one or more partners retiring in the next five years. Are you one of these partners or the one left behind? Smooth succession planning is something that takes time, and the handoff needs to be carefully planned and

executed if it is to be successful, and Kellogg & Andelson will be right by your side. Even if you have no plans to retire, by selling to Kellogg & Andelson you can become a part of our dynamic team without having the stress of making payroll, dealing with workers compensation, and the like that business owners face every day. Kellogg & Andelson works with your goals to stay working in your passion for years to come or to retire and spend your days with family.

**K&A is looking for firms that provide the following to small and mid-sized businesses and individuals:**

- Accounting and financial reporting services
- Bookkeeping and write-up
- Tax preparation and advisory services

The typical size firm K&A has acquired in the past had billings between \$500K and \$2 million.



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"My firm and my clients meant a great deal to me, so I did my own due diligence on Kellogg & Andelson before merging with their team. Once I walked into their office and was greeted with a smile and professional atmosphere. This experience was only compounded by employees that I talked to who told me that they enjoyed walking up every day to come to K&A. I couldn't be happier with the way Kellogg & Andelson has not only made me feel a part of the K&A Family, but has immediately made my clients feel secure." — Nancy Chandler

