

We acquire accounting, tax, advisory, and financial services practices as owner-operators and run them for the long term. *Your clients keep their advisor. Your staff keep their jobs. Your name keeps its meaning.*

\$1.4M

ACQUISITION
CLOSED

17 yrs

CPA FIRM
OWNERSHIP

40+ yrs

COMBINED ACCOUNTING
& FINANCE EXPERIENCE

5,000+

OWNERS & PROS
TRAINED NATIONWIDE

WHO WE ARE

SB

Shaniece Bennett, CPA, MBA

MANAGING PARTNER · ASSURANCE, COMPLIANCE & ADVISORY

Founder and owner of a public accounting firm she has operated for 17 years, built entirely on referrals. Audit and assurance specialist, peer reviewer, and national speaker who has trained more than 5,000 business owners and professionals. First-place winner of a professional pitch competition on the use of AI in audit, and an early adopter of the technology and staffing models that let a firm scale without losing service quality.

AW

Adrian Williams

PARTNER · OPERATIONS, FINANCE & INTEGRATION

Finance and operations executive with 15+ years across accounting, FP&A, valuation modeling, pricing strategy, and national account leadership at publicly traded and PE-backed companies. He owns the P&L, systems, and integration work — which keeps our CPAs focused on technical and client work.

PROVEN EXECUTION

\$1.4M virtual accounting & assurance firm — 2026

We acquired a fully virtual accounting and assurance practice and now operate it as Bennett and Company, with its team, systems, and client relationships intact. The transaction was funded with bank financing from a lender specializing in accounting practice acquisitions, meaningful partner equity, and a seller-aligned structure.

For the next seller, that means no learning curve: diligence checklists, a lender relationship, a technology stack, and a transition playbook that have already survived a real closing.

WHAT WE'RE LOOKING FOR

REVENUE	\$500K – \$5M+ in annual revenue; single-owner and multi-partner firms
SERVICE MIX	Open to multiple service lines: audit & assurance, tax, accounting / CAS & bookkeeping, fractional CFO, FP&A, controllership, valuation, wealth management, and strategy consulting
GEOGRAPHY	Anywhere in the U.S. We operate virtual-first with a footprint in NC and MI — remote practices welcome
SITUATION	Retirement, succession, or partial exit. Owners who want to stay on part-time are a fit, not a complication

WHAT A SELLER CAN EXPECT

- ◆ **Continuity, not extraction.** We are owner-operators buying to run the firm, not financial buyers optimizing for a resale.
- ◆ **Your team stays.** We invest in staff and technology rather than cutting our way to a return.
- ◆ **Flexible structure.** Cash at close, seller notes, and earn-outs — shaped around your timeline and tax position.
- ◆ **Funding already in place.** Practice-acquisition lender, partner equity, and a network of private investors.
- ◆ **Discretion throughout.** Confidential from first conversation to post-close announcement.

LET'S START A CONFIDENTIAL CONVERSATION

Shaniece Bennett, CPA, MBA

MANAGING PARTNER

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Adrian Williams

PARTNER, OPERATIONS & FINANCE

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FOR BROKERS & FINANCE PARTNERS

We move quickly on complete packages and can provide financial statements, proof of funds, and lender references on request. NDAs signed same-day.