

Accounting and Financial Services

Market Update

JANUARY 2025



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Key Trends and Headlines

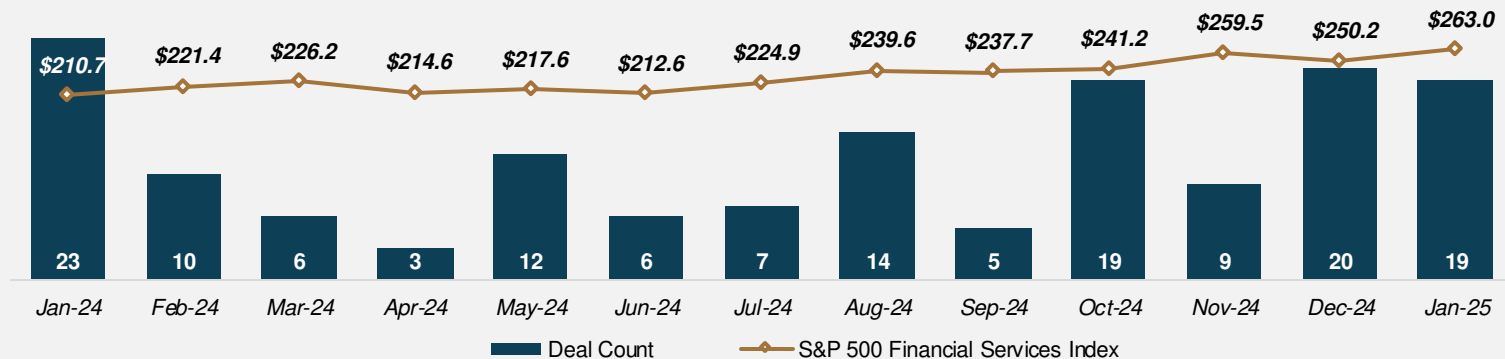
- 2025 off to a busy start. Following a banner year in 2024, M&A appears to be in full swing
- Firms are approaching busy season, and the change in the Administration and its impacts on the IRS and legislation have tax professionals looking to get ahead in advising their clients
- **Perhaps the biggest news of the month was Blackstone's majority investment in Citrin Cooperman from New Mountain Capital**
- War for Talent – many experts are bracing for a year of talent shortage and struggle
 - Creates demand and opportunity for Technology and Offshore investments
- Speaking of Technology...experts say that 2025 will see a significant increase in accounting and finance functions using Artificial Intelligence. In 2024 it was estimated that nearly 34% of finance departments had used some form of AI
- KPMG announced its intention to own a U.S. Law firm – we expect this to be a trend with many other firms setting up shop in Arizona, further diversifying and expanding professional services under 1 roof



Blackstone's majority stake in Citrin Cooperman marks the first significant transaction between private equity firms marking what we expect to be the start of several secondary transactions in the market

M&A Market Overview

U.S. Accounting Firm M&A and Market Trends



Note: Deal count Includes both PE platform investments in CPA firms and tuck ins / add ons

Notable Transactions January 2025





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Contact Us

Please reach out to us to schedule a call to discuss this month's market update or to explore how we can serve your business needs.

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