

Engineer growth. Ensure viability.

A stylized graphic featuring a large, dark teal semi-circle at the bottom, representing a river or a hill. Above it, a smaller, light green semi-circle is visible. To the right, a light blue semi-circle is partially shown. Three stylized leaves are positioned above the teal shape: a large green leaf on the left, a dark teal leaf in the center, and a light blue leaf on the right. The background is white with faint, concentric, wavy lines. The text 'WINDING RIVER' is written in large, bold, dark grey capital letters across the middle of the teal shape. Below it, the word 'CONSULTING' is written in smaller, light green capital letters.

WINDING RIVER

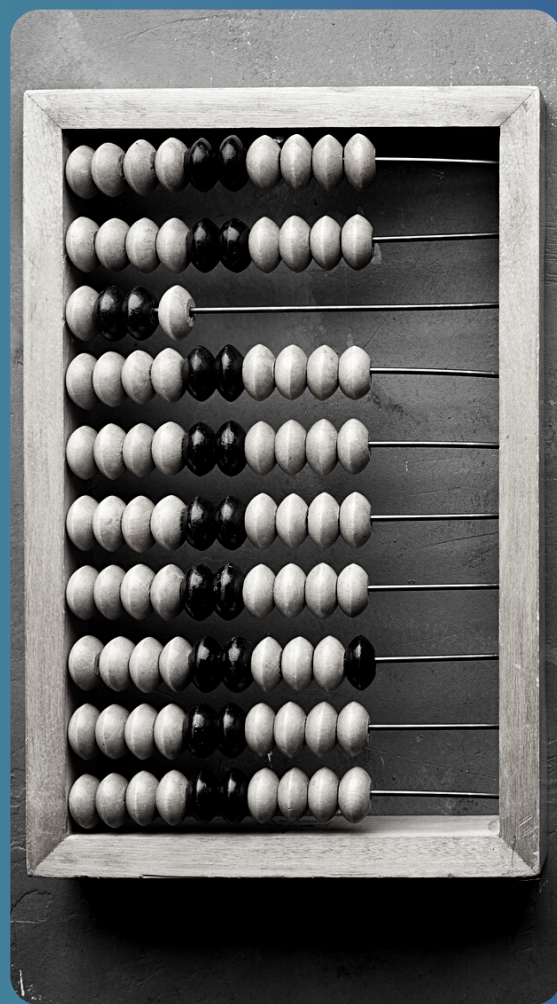
CONSULTING

2022

ABOUT US

Winding River Consulting (WRC) partners with firms to transcend the profession's value/proposition. WRC leverages deep industry expertise and data-driven strategies to identify untapped growth potential, engineer growth strategies, and ensure cross-operational integration enabling our clients to deliver a seamless experience to stakeholders – both internal and external.

Winding River Consulting believes in the unique value each firm brings - to its clients and to the accounting industry, at large. We believe every firm has the innate capacity to be World-Class. Utilizing data, analytics, market intelligence, leadership development, and deep industry expertise, we help our clients realize their missions and visions.



Making a measurable impact on firms across the globe.

**No. of Top 500
Clients We Work
With**

42

**In Transactional
M&A Deals**

\$100M

**Average Client
Year-over-year
Growth**

300%

Why Choose us ?

Winding River Consulting leverages tangible, data-driven strategies, and deep industry expertise to identify untapped growth potential, engineer growth strategy, and ensure cross-operational integration enabling our clients to deliver on their missions and visions to stakeholders both internal and external.

2022

WRC Mission

Winding River Consulting partners with firms to transcend the profession's value/proposition.

2023

WRC Vision

To become the preeminent consultant to firms dedicated to transcending excellence in the accounting industry.



Core Services



Strategic Growth

- Digital Marketing
- Niche Marketing
- LinkedIn & Social Media
- Digital Sales
- Digital Marketing Ops & Technology
- Content Marketing

Firm Strategy

- Growth Strategy
- Mergers & Acquisitions
- Succession Planning
- Advisory Board
- Practice Management
- Digital Rainmaker



Leadership Development

- Managing Partner Bootcamp
- Firm Retreats
- Leadership Coaching
- Business Development Training

Partnerships

- Trigger BPO
- Winning Ways Conference
- Introhive
- HubSpot Certified Partner



OUR TEAM

WINDING RIVER CONSULTING

GARY SHAMIS | CEO



Gary Shamis assumed responsibility for his father's accounting firm in 1981. Over the thirty-five years that followed, he took revenues from \$225,000 to approaching \$100 million and employees from a dozen to 600. He built the 37th largest independent accounting and consulting firm in the nation, before combining SS&G, Inc. with BDO USA, LLP in 2014.

Today, as principal of Winding River Consulting, a business advisory services company, Gary is a highly sought after speaker, facilitator, and consultant.

In its inaugural list of Managing Partner Elite in Accounting in 2012, *Accounting Today* identified Shamis as one of only ten people recognized for qualities required of a person in a firm's leadership role.

He is the "very model of the modern managing partner, and this list is more or less unimaginable without him," it stated, adding "he invented, codified, or popularized most of the strategies and best practices that are now taken for granted."

OUR TEAM

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DAVID TOTH | CGO



David Toth serves as Director of Growth and Principal for Winding River Consulting, a role he approaches with as much enthusiasm as he has expertise. With a focus solely on the accounting profession, David guides the Top 400 firms in designing and implementing highly effective strategic growth frameworks that encompass M&A, digital, and internal organic growth. A consummate leader, David facilitates Winding River Consulting's marquee program, Managing Partner Bootcamp, helping firms address the increasingly critical communication gap and gain alignment between leadership, marketing, and business development.

David has leveraged his digital expertise to help several Top firms develop digital growth strategies that achieve and even outperform desired outcomes. Always one to roll up his sleeves and get his hands dirty in the trenches, David's time-tested formulas yield measurable results, as he partners directly with firms, crafting custom solutions enabling clients to amplify their voices, their messages, and their bottom lines.

David has served as an outsourced CMO for organizations in sectors from fast-growing start-ups to well established Fortune 500 companies. He has a knack for building meaningful relationships. David has found that while each business and industry is unique, the foundation to success is always the same – know your customer.

OUR TEAM

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ILANA ISAKOV KATZ | CONSULTANT



As a marketing strategist, Ilana Isakov Katz relishes the opportunity to combine the art and science of marketing to create integrated marketing communications solutions. Drawing on her experience with Fortune 500 company clients, Ilana designs, implements, and measures performance-driven and results-oriented plans and programs to support dynamic objectives. She is an award-winning marketing communications professional with extensive involvement in marketing, branding, and advertising. Ilana develops creative and design direction for successful corporate identity and brand building campaigns. She is a speechwriter, ghostwriter, business writer, and copywriter. She is an ardent follower of AP Style standards and an Oxford comma enthusiast.

With comprehensive experience in community, employee, media, and public relations, she has worked alongside CEOs to compose messaging platforms and content that support corporate positioning. Ilana has served as national media spokesperson for purposes of general corporate representation and in times of crisis.

Ilana spent more than a decade as director of marketing for SS&G, Inc. (now BDO) where she oversaw the advertising, PR, website and social media, and events, as well as business development engagement and client service delivery.

OUR TEAM

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JOY YOUELL | SEO CONSULTANT



Joy Youell is a content strategist who helps companies understand that their content is more than just words on a page: it is a powerful tool that magnetizes a brand, providing essential differentiation in crowded markets. Her academic background in philosophy and psychology equipped her with a deep understanding of human behavior. She spent many years as the Chief Editor of an education franchising company, which gave her a taste for the winning power of marketing copy and its ability to transform the trajectory of businesses of all sizes.

Joy now provides both consultation and content production services for Winding River Consulting clients. She works closely with the digital marketing team to conceive and execute on creative strategies.

Joy is also the founder of Hire a Writer, a copywriting agency and training ground for copywriters worldwide. She is an avid student of human communication, a leading expert in on-page SEO, and a capable leader and instructor.

OUR TEAM

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TRISHA DAHO | CULTURE DEI CONSULTANT



Trisha spent most of her career leading large, diverse teams toward the delivery of value for her clients at a Big 4 Accounting and Advisory firm, wherein she served as a partner. She has been pivotal in the discovery and sustainability of value in the billions of dollars for her clients. She has worked with executives and their teams in dozens of Fortune 500 companies in the majority of states. She has also created enormous value for entrepreneurs, high growth companies, and aspiring start-ups.

Having made partner in a Big 4 accounting firm in 9 years, Trisha was charged with building thriving practices from scratch in 4 different regions of the country. Through laser-focused strategies and the ability to scale talent and service delivery quickly, she was able to create growth businesses that have expanded exponentially. The leaders she's cultivated have gone on to be partners, CFOs, CEOs, and much more.

With her own company, Empowered Leadership Cultivation, Trisha partners with C-suites and managing partners to think, plan, and execute strategically for the purpose of accelerated and sustainable growth, primarily in professional service firms. She also partners with larger firms to create success for women and diverse people who are entering leadership positions through a diversity and inclusion peer advisory experience focused on strategy, high performing teams, and advocacy in leadership.

EVENTS



MANAGING PARTNER BOOTCAMP

MPB is a masterclass that shapes already established organizational leaders into leaders of exceptional ability.

Our mission is for attendees to come away with a skill set that enables them to design a firm — not simply manage it as problems arise. What most Managing Partners learn through trial and error over ten years or more, you'll learn at MPB accelerating your competencies and the trajectory of your organization.

WINNING WAYS

The **only** event of its kind, Winning Ways was created specifically for accounting firm leaders to address the most critical, contemporary issues impacting firms today.

Winning Ways is an elite event where industry innovators gather to share their knowledge and experiences running world-class accounting firms. From around the globe and representing practices of all sizes and markets, this is the conference to attend if you are looking to take your firm from status quo to cutting edge.



DIGITAL DEEP DIVE SUMMIT

Digital Deep Dive is the first summit dedicated to elevating your accounting firm's digital strategy through a focus on driving revenue and client acquisition. With digital commerce transforming the way professional services firms do business in an increasingly competitive industry, this opportunity will help growth-oriented firms move the needle by learning how to gain leadership buy-in, lay the groundwork for firm-wide adoption of a digital-first culture, and align your marketing, business development, and leadership teams around data-driven KPIs.

THANKYOU



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