

Whitman Advisory Launches Partner & Leadership Transition Coaching Program for CPA Firms

Whitman Advisory launched its Partner & Leadership Transition Coaching Program, a structured service built to solve the human side of a firm leader's exit.



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[Whitman Advisory LLC](#) today launched

its Partner & Leadership Transition Coaching Program, a structured 90-day engagement built to solve the piece succession planning leaves out: the human side of a firm leader's exit.

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Succession consultants close the deal, and financial advisors handle the money. But the question that matters to a departing partner usually is unasked: what is next for them? This program answers it.”

Tavi Meketon, Managing Director at Whitman Advisory

Meketon, MBA, SPHR, CPRC, Managing Director at Whitman Advisory. "But the question that matters most to a departing partner almost always goes unasked: what comes next for them? We built this program to answer it with the same rigor a firm brings to every other part of the transition."

The program pairs each leader with 12 weekly one-on-one sessions organized around Four Pillars. Identity Beyond the Firm separates the person from the professional title. Time & Structure rebuilds a daily rhythm once the firm no longer sets the cadence. Social Connection creates a deliberate relationship landscape. Legacy & Impact turns

the work into an executable plan.

Firms and leaders can enroll through three paths: Direct-to-Leader for individuals owning their own transition, Firm-Sponsored as part of a succession package or M&A transaction for departing partners, and Referral Partner for advisors, planners, and attorneys who manage the financial picture and want a trusted partner for the human one.

“Participants leave this program with concrete deliverables, not vague direction,” said Philip J. Whitman, CEO and President. “They have a 12-month roadmap anchored by specific commitments and a written Personal Intention Statement that defines who they are in the next chapter.”

Firm leaders, firms designing better succession processes, and advisors seeking a trusted human-side partner can learn more at <https://whitmanadvisory.com/services/partner-leadership-transition-coaching-program/>.

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About Whitman Advisory LLC

Whitman Advisory LLP is an innovative professional services advisory firm providing clients with tailored strategies for M&A, succession planning, operational support, and talent solutions. Our multidisciplinary team serves CPA firms, private equity firms, and privately held businesses with a people-first, client-centric approach focused on helping them achieve their goals and create lasting impact. To learn more, visit our website at www.whitmanadvisory.com.

Jennifer Palmer Farrington

Whitman Advisory LLC

+1 203-894-6473

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