

Banking & Finance

New York accounting giant opens first Michigan office with acquisition of metro Detroit firm

By Anna Fifelski



Credit: CoStar.

Croskey Lanni's satellite office in Novi.

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May 07, 2024 04:11 PM | 19 HOURS AGO

A large New York-based accounting and advisory firm is establishing its first office in Michigan by acquiring a metro Detroit firm.

Marcum LLP has acquired Croskey Lanni, PC, which has locations in Rochester, Novi and Boca Raton, Fla. Barclay Planning Group, owned by Croskey Lanni and located in Rochester, will also join Marcum.

Troy-based Kelly Services plans its biggest acquisition ever

Novi wealth management firm aims to be a 'one-stop-shop' for clients

The merger became effective May 1 and will add over 50 employees and six partners to Marcum's team, according to a news release. Michele Weber and Steve Scheel will join Marcum as the new office managing partner for Rochester and office managing partner for Novi, and Boca Raton, Fla., respectively.

Marcum is ranked 13th largest CPA firm by Inside Public Accounting, a public accounting management and data publication headquartered in Missouri, with net revenue of \$1.22 billion. The current largest, locally-based firm, is Plante Moran, headquartered in Southfield, ranked 15th with net revenue of \$1.01 billion.

"Both Marcum and Croskey Lanni offer complementary business services with a shared passion and commitment to our teammates and clients," David Croskey, founder and managing partner of Croskey Lanni, said in the release. "We both hold similar cultural values that encourage teamwork, innovation, and professional growth. This move creates exciting new opportunities for our team members while setting the stage to deliver unprecedented solutions for our clients. Teaming up with Marcum will allow us to continue our vision with the resources they provide. Based upon our research and within our industry, we believe Marcum is the best CPA firm in America, and we are proud to become a part of their platform."

With the acquisition of Croskey Lanni, Marcum introduces advanced assurance, tax, and advisory services alongside a full array of specialized business and financial solutions relating to R&D tax credits, international tax, transaction advisory, and advanced cyber and information security services to its portfolio of services.

"Our shared values and commitment to excellence drove the acquisition of Croskey Lanni," Jeffrey Weiner, chairman and CEO of Marcum, said in the release. "Both firms focus on providing customized solutions for complex business challenges. Croskey Lanni's impressive track record of working closely with clients to enhance value

LLC served as merger advisors for Croskey Lanni.

In January, Marcum announced it acquired Connecticut-based Federman, Lally and Remis, a firm specializing in automotive, as well as food and beverage sectors.



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Anna Fifelski is a reporter covering startups and technology companies in Southeast Michigan as well as banking and finance. She joined Crain's in September 2023. Fifelski is a graduate of the University of Michigan.

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