

# JEFFREY M. WEINER, CPA\*

CHAIRMAN & CHIEF EXECUTIVE OFFICER



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Jeffrey Weiner joined Marcum in 1981 and has led the Firm since 1990, when he was named Managing Partner. In June 2017, he was named the Firm's first Chairman & Chief Executive Officer. Under Mr. Weiner's leadership, Marcum has grown from a single-office firm of 20 employees to a firm ranked among the largest in the United States.

Mr. Weiner has steadily expanded the Firm's global footprint through organic growth, strategic mergers, acquisitions, and joint ventures in major business markets across the country and overseas. Today, Marcum LLP is one of the largest independent public accounting and advisory services firms in the nation, with offices throughout the U.S., as well as select international locations. Headquartered in New York City, Marcum provides a full spectrum of traditional tax, accounting and assurance services; advisory, valuation, and litigation support; managed accounting services; and an extensive range of specialty and niche industry practices. The Firm serves both privately held and publicly registered companies, as well as nonprofit and social sector entities, high net worth individuals, private equity funds and hedge funds, with a focus on middle-market companies and closely held family businesses.

Mr. Weiner has been single-minded in diversifying Marcum's services and capabilities to meet the evolving needs of the Firm's clients, a key factor in the Firm's continuing growth. In addition to the core tax and accounting business, Mr. Weiner has built a multiservice organization providing a comprehensive range of professional services, including accounting and advisory, technology solutions, wealth management, and executive and professional recruiting. The Marcum Group companies include Marcum LLP; Marcum Technology LLC; Marcum Search LLC; Marcum Staffing LLC; Marcum Financial Services LLC; Marcum Bernstein & Pinchuk LLP; Marcum Wealth Management, LLC; and Marcum RBK (Ireland) Limited.

A strong advocate of leveraging technology for business solutions, Mr. Weiner established Marcum as an early pioneer of technology strategies to modernize traditional accounting processes and drive efficiency, productivity and growth for the Firm and its clients. Technology is a fundamental platform of his vision for Marcum's future, rooted in his belief that wholesale change is coming to the accounting industry and the ways that firms will service in their clients in the future. His technology charter for Marcum is business innovation, digital transformation, digital customer experience, data analytics, and security/risk management. One result is Marcum's Robotic Process Automation (RPA) service, designed to automate repetitive manual processes and streamline data-driven functions to help clients reduce their operating costs and improve efficiency through the use of "bots." Another is Marcum Pulse, a unified enterprise platform that brings together multiple service lines in a single operating window to streamline client service and provide real-time performance metrics. Such initiatives have earned Marcum recognition nationally and regionally, for technology leadership by LEA Global: the Leading Edge Alliance in 2018 and as a Best Accounting Firm for Technology, by *Long Island Business News* in 2019.

In 2016, Mr. Weiner became the first U.S. accounting firm leader to be twice named an "MP Elite" by *Accounting Today*. In inducting Mr. Weiner into the exclusive ranks of elite accounting firm managing partners, the publication noted his achievement in continually

\* Licensed by the State of New York

## Thoughts of the Week

A Blog by Marcum's Chairman  
& Chief Executive Officer

[www.marcumllp.com/Jeffrey-Weiner](http://www.marcumllp.com/Jeffrey-Weiner)

## EDUCATION

- ▶ Bachelor of Business Administration, Accounting  
Hofstra University

**MARCUM**  
ACCOUNTANTS ▲ ADVISORS

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# JEFFREY M. WEINER, CPA\* (Continued)

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growing Marcum's revenue, reach and relevance. "[Mr.] Weiner was a member of our inaugural class of the MP Elite in 2012, and it's no accident that he returns this year - he's one of the most admired firm leaders in the country, and continues to lead Marcum to new heights, remaining just as aggressive in both M&A and organic growth. When he first made the list, we noted his national drive; now we can note his international drive, with a major presence in China. He keeps the firm innovative with new offerings in practice areas like LGBT services, cybersecurity, and alternative investments, and built a stable of affiliated companies in wealth management, technology, executive search and more...Weiner is truly one of the Elite," the editors wrote. The MP Elite are a group of accounting firm leaders "who point the way to the future, who set the best practices that others follow, and who lead the most successful, most admired firms."

Mr. Weiner has been recognized by *Accounting Today* as one of the industry's Top 100 Most Influential People and was voted one of its Top Five Most Admired Peers in a national poll by *Inside Public Accounting*. He was profiled as a New York City CEO in four consecutive annual issues of *Leaders* magazine, which highlighted the nine core values that are the foundation of Mr. Weiner's management ethic for Marcum. Mr. Weiner was named a New York Icon by *Long Island Business News*, which recognized his leadership in growing Marcum from a local Long Island accounting firm into a top-tier national service provider. In November 2018, he was inducted into the Long Island Business Hall of Fame.

In addition to his responsibilities as CEO, Mr. Weiner leads Marcum's entertainment practice and is a nationally recognized expert on personal business management for the entertainment industry. He is also credentialed as a film and television producer, most recently debuting *Treadstone*, a series for USA Network based on the spy agency created by Robert Ludlum in his Jason Bourne novels, in October 2019. He previously produced or executive produced several installments of Universal Pictures' *Bourne* film franchise, including *Jason Bourne* (2016), *The Bourne Ultimatum* (2007), and *The Bourne Supremacy* (2004), starring Matt Damon in the title role, and *The Bourne Legacy* (2012), starring Jeremy Renner. He was also executive producer of *The Hades Factor*, a mini-series that aired on CBS television in April 2006.

Mr. Weiner is a founding member of LEA Global, an international association of independent accounting firms operating in 110 countries, and is currently its vice chairman. LEA Global has honored Marcum with LEA Edge Awards for industry excellence in several categories, including Mr. Weiner's blog, *Thoughts of the Week*. In 2017, the association named Marcum Innovative Firm of the Year. LEA's then-president noted: "Whether it's IT, leadership development, community service, strategic planning, marketing, succession planning or client service, this firm seems to perpetually be on the leading edge. It has grown into a powerhouse with resources from coast to coast and beyond through creativity, effective planning, cultural innovation and empowering leadership."

Marcum was also the recipient of the LEA Innovative Firm Initiative of the Year Award in 2012; in 2016, the Marcum Foundation was honored with the Edge Award for Outstanding Community Service, capping its first full year as a national charitable organization. Mr. Weiner has also been distinguished with the LEA On the Edge Innovation Award, which recognizes an individual who has made an enduring and pioneering contribution to the public accounting profession.

### Professional & Civic Affiliations

LEA Global: the Leading Edge Alliance, Founding Member

Hofstra University, Zarb School of Business Dean's Advisory Board – member

Long Island Business Development Corporation, Advisory Board

The CPA Journal, Editorial Board

The Children's Medical Fund of New York, Vice President, Executive Board Member

Nassau County Society for the Prevention of Cruelty to Animals, Board Member

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