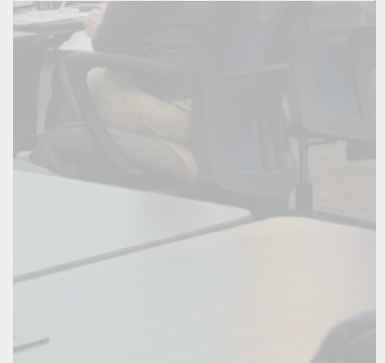
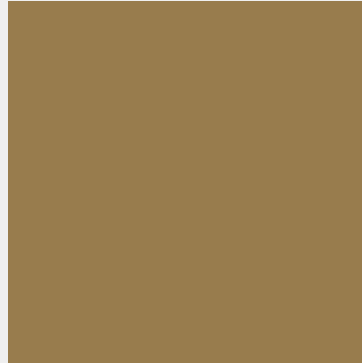
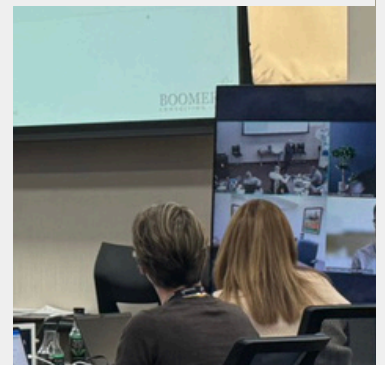
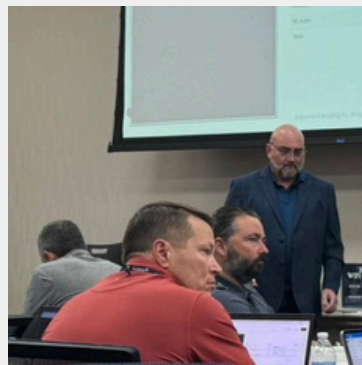
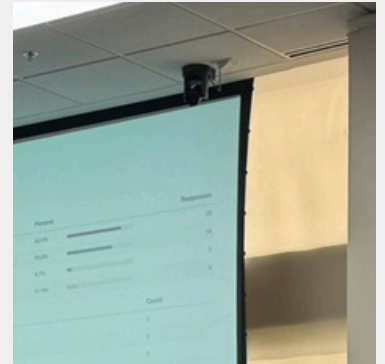


2026

Highlights from the

Boomer Managing Partner Circle

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Highlights from the Managing Partner Circle™ — 2026 Spring Meeting

The Boomer Managing Partner Circle is a community of Managing Partners from across the country who gather twice a year to share knowledge and best practices, and to propel each other to higher levels of success. Learn more at www.boomer.com/mpc.

In May of 2026, our members met in Kansas City, Missouri, for lively and insightful sharing of their perspectives on the challenges and opportunities facing their firm and the profession. The discussions centered on the following topics:

- **Trends for 2026**

- The accounting profession is changing, and trend awareness has shifted from strategic planning into a near-real-time leadership discipline.
- During this session, our consultants shared macro trends managing partners need to be aware of now, including AI-first cultures and redesigning operating models for scale. The session also included time for discussion and Q&A.

- **Metrics Discussion and Review**

- Traditional metrics like utilization, realization, and leverage ratios are increasingly difficult to rely on in the context of AI-driven capacity shifts.
- This session included a live walkthrough of the Power BI benchmarking dashboard, which allows members to slice data by firm size and revenue. The discussion brought up growing interest in gross revenue per FTE and gross revenue per partner as meaningful comparison points.

- **Sponsor Highlights**

- Sponsor sessions from LCvista and Aiwyn focused on two critical priorities for most firms: developing and retaining talent while optimizing the client and operational experience.
- LCvista shared insights around learning, compliance, and workforce development strategies, while Aiwyn highlighted innovations in client engagement, billing, communication, and collection workflows. Member discussions following the sessions centered on how firms can better align people, processes, and technology to support growth and scalability.

- **Managing Partner Circle Exchange**

- Peer presentations on real firm initiatives are where abstract trends become concrete, and where members sometimes discover what their firm is doing is more innovative than they realized.
- A few of our Circle members shared projects or tools they're using in their firms today. Topics included how one firm structured its operations around AI and capacity-

planning tools and how it has improved budgeting, forecasting and reassignment workflows.

- **Retaining Managers Who Aren't on a Partner Track**

- As firms shed the "up or out" model, the question of how to retain high-performing managers who have no interest in partnership is a pressing talent design challenge for growing firms.
- During this Ask Your Peers discussion, the group explored a range of approaches, including director-level positions that formalize a non-equity career path, customized bonus structures tied to individual contributions rather than firm-wide metrics and flexibility as a retention lever alongside compensation. Several members noted that simply communicating that partnership is not the only valued path (and meaning it) does more retention work than most formal programs.

- **IRS Electronic Payment Requirements**

- New IRS mandates around electronic tax payments create client education and workflow challenges, with no universal industry standard yet in place for how firms should handle the payment-making responsibility.
- During this Ask Your Peers conversation, members shared a range of approaches they're taking. Some firms are educating clients to make payments themselves via EFTPS and similar platforms. Others handle payments on behalf of clients and build them into fee schedules. Several noted they pre-load client banking information into tax software to schedule payments directly, and charge for the service when clients can't or won't self-serve.

- **Modern Client Experience**

- Clients no longer need CPAs to access information. They can Google it, benchmark it, or get an AI-generated answer in minutes. The technical edge is gone. What's left is the relational one, and most firms aren't deliberately building it.
- Our consultants led a facilitated discussion using the book *Unreasonable Hospitality* by Will Guidara as a foundation, exploring how firms can move from delivering compliance work that clients tolerate to creating experiences clients remember. The discussion covered how AI can help personalize client interactions at scale and the tension between billing pressure and experience-building behaviors.

- **Resources Update**

- Staying current in a profession that is evolving at the speed of AI requires intentional curation. Random consumption isn't sufficient.
- In this conversation, members shared the resources they're actively using to keep up with the pace of change. We also discussed Notebook LM as an essential tool for filtering what's actually worth reading. Users can drop in a podcast or article, ask how it applies to CPA firm leadership, and decide, based on the summary, whether to go deeper.

As always, it's impossible to cover everything discussed at the last Boomer Managing Partner Circle meeting in a short summary. However, the trends and issues described in this report should give you some great insight into the challenges and solutions that managing partners are thinking about today.

An Invitation to Participate in The Boomer Managing Partner Circle™

To learn more about The Boomer Managing Partner Circle™ community, please visit <http://www.boomer.com/mpc>.

About Boomer Consulting, Inc.

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