

MANAGEMENT CONSULTING

ABOUT THE FIRM

Whitley Penn is one of the largest Texas-based, public accounting firms with 95 partners, nine offices, more than 850 employees, and a worldwide network affiliation with HLB International. Whitley Penn is the 35th largest firm in the nation based on 2024 rankings in *Accounting Today*, 35th in the nation based on 2024 rankings in *INSIDE Public Accounting's* "Top 100 Firms", 20th in the nation based on 2024 - 2025 rankings from VAULT ACCOUNTING 25. We have an extensive team of experienced audit, tax, consulting, and valuation professionals that we will be able to draw upon as needed.

The primary mission of Whitley Penn is to be a partner with our clients by providing an unmatched level of high quality service. Focusing on this mission ensures consistent improvement as we diversify and grow our client-base, service offerings, and people. We live out our mission as we learn, innovate, and succeed by sharing knowledge, embracing diversity, and working together.



THE WHITLEY PENN DIFFERENCE



PERSONALIZED APPROACH

Tailored solutions for your unique needs.



EXPERIENCED NETWORK

Diverse team across industries and capabilities.



STRATEGIC INSIGHTS

Actionable recommendations for growth.



TIMELY DEPLOYMENT

Our meticulous approach allows us to be ready to deploy resources on your timing.

MANAGEMENT CONSULTING DEFINED

We specialize in solving complex business challenges through a personalized, collaborative approach, focused on delivering key results for your business. Our capabilities include strategy development, planning, organizational alignment, process optimization, and technology implementation.



STRATEGIC PLANNING

- » Development of Strategic Plan
- » Executive Guidance
- » Process Improvement
- » Change Management



DATA PRODUCTS & STRATEGY

- » Financial Reporting Analysis
- » KPI's & Value Driver Identification
- » Executive Reporting
- » Multi-Dimensional Reporting



CFO SERVICES

- » Budget & Projections
- » Profit Improvement Initiatives
- » Supply Chain Optimization
- » Capital Structure Analysis



TECHNOLOGY

- » Tools & Platform Assessment
- » Total Cost of Ownership
- » Automation Opportunities
- » Vendor Selections

MEET THE TEAM



FRANK IANNELLI

Strategic Consulting Managing Director

Frank Iannelli has more than 35 years of diversified business experience providing strategic, operational and financial consulting to executive management teams and leading initiatives to achieve strategic business goals. He leads the Strategic Consulting Services group, a division focused on assisting companies, investors, boards and management teams to improve operating and financial performance. The services this group offers include, Strategic Financial Services, and Interim CFO support.



JAKE BAINE

Data Analytics, Products & Strategy Senior Manager

Jake Baine, an accomplished technology consultant with a decade of experience, now leads our CIO Advisory service offering. With a focus on transforming clients' existing data and analytics into valuable insights, Jake's experience empowers organizations to make informed decisions, optimize processes, and drive strategic growth. Whether it's data governance, technology roadmaps, or digital transformation, our CIO Advisory team, under Jake's guidance, ensures valuable impact through a data driven approach.



JAKE MORRIS, CPA

Client Accounting & Advisory Services Partner

Jake Morris has more than 14 years of experience in the accounting industry, including 10 in public accounting and 4 as a controller. Jake's experience includes CFO and Controller support, full scale outsourced accounting engagements, and special projects. He excels at personnel/department management and leadership, month-end procedures and reconciliations, financial statement presentation and analysis, and budgeting/forecasting.