

# Client Types — And How to Educate Them

A huge challenge for business managers is establishing a trusting connection  
and managing expectations • By Todd Longwell • Illustration by Alisa Gao



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oney is a complicated thing,

both practically and psychologically. It can be a ticket to freedom or a dark presence leading people on a path to destruction, and it's always a fussy child that needs to be watched carefully and nurtured.

It is an especially thorny topic in the world of entertainment, where money can arrive suddenly and leave just as quickly if not handled properly. That's why so many actors, musicians, directors and others employ business managers.

To their clients, business managers can be seen as magicians, trusted consiglieres or scolding parental figures. For their part, business managers have to deal with an array of personalities with varying career scenarios that can be tricky to navigate. Nonetheless, there are ways to foster financial health of clients across the board.

Athletes are an especially tricky group to advise. Ask almost any business manager who the most challenging clients are and they'll tell you that it's professional athletes. By the time they go pro athletes are long accustomed to being treated like celebrities in their community, but typically have no experience in dealing with money. The problem is exacerbated by the fact that their careers tend to be short and can be ended at any moment by a catastrophic injury.

Athlete clients often "grew up poor and didn't go through the normal stages like an actor or writer does, waiting tables," says New York-based business manager Evan Bell, managing partner of Bell and Co. "They went from the training table in high school to training table in college to the NBA or an NFL career."

Bell says they often suffer from what he calls "big shot-ism." Once an athlete signs a big pro contract and the money starts pouring in, they not only buy themselves a big house, fancy car and jewelry, they fund luxurious lifestyles for friends and family and, worse yet, listen to their investment advice.

"The problem is when somebody gets in their ear who doesn't have the experience and isn't looking out for the client's best interest but that emotional connection to them," says Bell.

Another difficult category is the profligate spender. Clients can bleed out financially with multiple small to medium-sized streams of financial indulgences, or they can wipe out large chunks of their fortunes in one fell swoop by purchasing a big-ticket item like a yacht or a private jet, which have both high price tags and astronomical maintenance costs.

"If you're someone like Johnny Depp or whatever, and you can have a \$50 million Gulfstream and still have hundreds of millions of dollars, I guess it doesn't matter, but for most people, it's not worth it," says business manager Layth Carlson, a partner and Callas & Carlson. "Just to keep the plane parked at Van Nuys airport can cost a million a year, whether you run it or not. You've got FAA checks, you've got insurance. It's unbelievable."

In some circles, private islands have overtaken private jets as the ultimate status symbol.

The island that Phil Sarna's client wanted to buy had no electricity or running water, which meant it would require generators to provide electricity, fuel to power the generators and a place to store the fuel, along with a water desalination system, a boat to ferry people and supplies, and a full-time staff to service everything.

"It was a beautiful island, but it would have been a disaster because just to get infrastructure it would have made this \$10 million island a \$20 million purchase," says Sarna, founder of PS Business Management. "And that's assuming you would have been able to build a house on it that was sustainable and worth visiting more than a few times a year."

And then there are the gamblers. The classic bad celebrity investment is a restaurant, which appeals to the ego as a physical manifestation of success, where the owner can commandeer the best table in the house and entertain friends and family while press and public are kept at bay by staff and security on the other side of the velvet ropes. But according to the National Restaurant Assn., 60% fail in their first year of opening, 80% fail within five years.

"It's not for the faint of heart," says Matthew Burke, managing partner of Singer Burke. "It generally takes three times as long as one might think to build a business, it costs three times as much and you make a third of what you think you're going to make, at least starting out. It's hard to implement the checks and balances and internal controls in a business or where there's a lot of cash or a lot of personnel turnover."

And then there's crypto. In fact, cryptocurrency had overtaken restaurants as the risky investment of choice in recent years, but a crash in the market last year, spurred by the collapse of TerraUSD and the bankruptcy of FTX, which had been promoted with celebrity endorsements from everyone from quarterback Tom Brady to "Curb Your Enthusiasm" star Larry David, has given business managers more leverage to steer clients away.

"Some people got in and out at the right time, but it didn't make a tremendous amount of sense to me and I'm glad it's no longer really part of the discussion," says Mark Cattalini of Level Four Business Management.

On the flip side of the coin stand those clients determined to steer clear of any and all financial pitfalls. Call them the risk-averse. "Those are called good clients," says Sarna. "I've never had a client that's too conservative."

Fiscally conservative clients span the generations, from boomers to Gen Zers. "As you get older, you take on less risk because you need to be able to plan your

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**As you get older,  
you take on less risk.”**  
— David Garelick

monthly spending and what you are bringing in with each month with a high degree of probability, so that is understandable,” says David Garelick, president of Global Business Management. “But some of the younger clients were around in 2008 and 2009 when we had the Great Recession, and they can be skeptical of the markets.”

But fear of risk can become a negative for clients overly cautious during their peak earning years. “That scenario is when your career is ahead of you and you’re earning enough to maintain your lifestyle, but your asset base needs to be growing for you to support your retirement,” says Bell. “We have clients who grew up poor who sometimes don’t even want to invest in the stock market. It’s all bonds. They’re just afraid to lose it all.”

Another category can be called builders. These are the types who are likely to exhibit good fiscal habits, such as producers.

“Producers that are running their own production companies tend to be very focused and savvy when it comes to return on investment in terms of every dollar they put into their company or their project slate,” says Burke. “And those are very interesting and

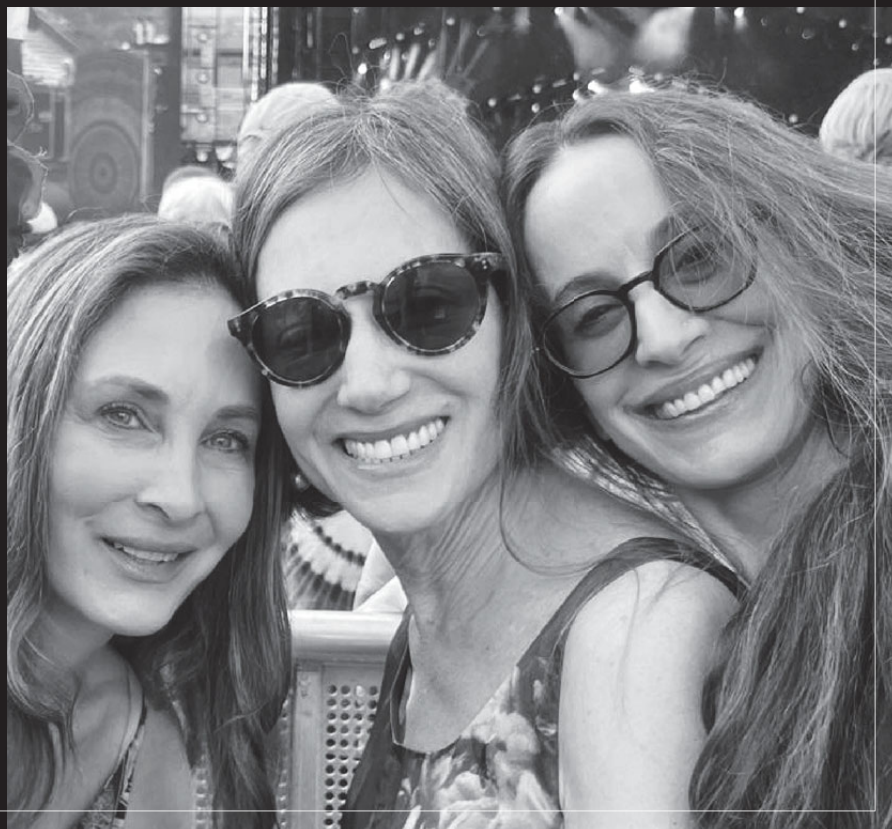
exciting clients to work with because they understand the whole gamut. They’ve got staff, they’ve got employees, they’ve got HR and other issues to deal with in terms of financial planning and budgeting, not just for their show or their project, but for their company.”

For all these categories, the business manager is an educator, often teaching fiscal literacy to clients who are new to wealth and, according to Elizabeth Campos, director of business management for Manhattan West, the process starts with establishing a trust with her clients built upon honesty and transparency.

“My job is to discipline them and to educate them and to show them the consequences or maybe the rewards,” says Campos. “It’s really worked in my favor because when everyone is going to my clients with these amazing investments, they know to come to me first so we can do our due diligence and make sure it checks all the boxes, instead of impulsively entering into the investment based just on positive buzz.”

The key lesson clients need to learn is what constitutes an acceptable risk proportional to their wealth. For instance, if a client is worth \$100 million, buying a \$5 million house is fine, but they should think twice if they’re only worth \$10 million. Also, putting money in crypto or another bleeding edge investment might not be such a bad idea, provided it’s a small portion of their overall portfolio.

“Clients are always ahead of the game when it comes to new technology and seeing the future way more than the rest of us mortals,” says Sarna. “But there has to be a balance in terms of risk and timeline and liquidity.”



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# The Money Therapist

True to her roots, *Variety* Business Managers Elite honoree Carrie Malcolm

is a rock star in her profession • By Todd Longwell



Carrie Malcolm will be honored Nov. 9 at *Variety*'s Business Managers Elite event.

**Very few people plan to become a business manager,** and it's safe to say that hardly anyone ever planned to do so less than Carrie Malcolm.

Malcolm stumbled onto her career path when she found an uncashed \$30,000 check made out to her then-boyfriend, a cinematographer named Danny, between the cushions of his couch, which led to the revelation that he didn't have a checking account and hadn't done his taxes in six years. So she got his financial affairs in order and hooked him up with an accountant named Martin J. Geller.

Impressed with her efforts, Geller told her about a group of models who were always getting their electricity and their phones shut off when they were traveling, and suggested she do for them what she had done for her boyfriend — paying bills and doing their taxes — but on a professional basis. Malcolm accepted the challenge and quit her job as an assistant at a production company and went to work for Geller.

"The models would bring me shopping bags with receipts, and the receipts were in lira and pounds and francs," recalls Malcolm. "Marty said to me, just think of yourself as a magician making order out of chaos."

What started as a private financial rescue operation for a boyfriend resulted in a decades-long professional career, which she'll be honored for, along with her philanthropic efforts, on Nov. 9 at *Variety*'s Business Managers Elite Breakfast.

Today, Malcolm, who is based in New York, works her magic for a roster of clients that include Ethan Hawke, Sofia Coppola, Benedict Cumberbatch, Jennifer Connelly, Heather Graham, Ariana DeBose, Sophie Turner and Anderson Cooper through her firm CRM Management, which, since 2020, has been a division of business management giant NKSFB.

"Every client of Carrie's loves her and treats her like she's part of the family, and you don't get that in this business very often," says Harley Neuman, whose Encino-based company Neuman + Associates is also a division NKSFB. "She's also knows her stuff and is very good at explaining complicated things to people."

Malcolm is equally complimentary about her clients, whom she describes as being generally well-educated, conservative with their money and interested in what she has to say.

"One of my clients called me a 'money therapist,'" says Malcolm. "I figure out how much people want to engage with their money and then insist that they look at it, but in a way that they can handle. I don't talk down to people, but in the reports I give them, I use a good font and bullet points, so it's easier to understand."

Although she and her cinematographer boyfriend Danny have long since parted ways, his younger brother, actor David Duchovny, is one of her oldest clients. She first met him when he was a Thomas Pynchon-obsessed English lit grad student at Yale who would drop by to borrow money from his brother (who spells his last name Ducovny). After





the future star of “The X-Files” moved to California to pursue an acting career and landed a role in the movie “Kailifornia” (1993), starring Brad Pitt and Juliette Lewis, he enlisted Malcolm to handle his finances.

“For me, it was most important that I had somebody that I trusted as a person and was happy talk to on the phone and have an email relationship with,” says Duchovny. “There have been people in my life on the representation side whose calls I dread getting because they’re not full people a lot of the time. And Carrie is always a full person.”

A New York native, Malcolm came west after high school to enroll as an English major at her father’s alma mater, UC Berkeley, which she chose in part because it was located near the home base of her favorite band, the Grateful Dead. It wasn’t an idle obsession: Malcom wound up hanging out in the band’s studio in nearby San Rafael and eventually took a break from her studies to go on tour with them.

After earning her degree, Malcolm immersed herself in the Bay Area punk scene, writing and editing articles for the underground zine *Damage* and serving drinks at the legendary San Francisco punk rock club the Mabuhay Gardens, before moving on to the nearby Rock Theatre, where she ran sound for bands such as the Dead Kennedys, Black Flag and the Circle Jerks.

The Circle Jerks said that “they would stop kicking the monitors off the stage if I would get them beer,” recalls Malcolm. “But the more beer I got them, the more they kicked the monitors.”

Through it all, she maintained a passion for the Dead that she wasn’t shy about sharing with others on the scene, including members of local art punk legends the Mutants, whom she took to see the ’60s counterculture icons in concert.

Eventually, Malcolm returned to New York City and made her sideways leap into the financial services industry. With Geller’s encouragement, she took some classes in accounting and entertainment law at NYU, then completed a two-year course to become a certified financial planner.

“I thought I had created a new career,” says Malcolm. “I didn’t know there was a name for what I did.”



In 2007, Carrie Malcolm, far right, attended the Esquire magazine Oxfam event with Advanced Global Capital founder Janet McKinley, far left, with then-Esquire publisher Kevin O’Malley, second from left, and client Heather Graham, second from right.

Eventually, Malcolm moved to Peyser & Alexander, where one of the company’s clients was Steven Haft, who produced the movie “Dead’s Poet Society” (1989). He referred one of its stars, Ethan Hawke, to the firm and Malcolm and the young actor wound up hitting it off. In 1991, she helped Hawke establish a new theater company, Malaparte, co-founded with two of his co-stars from the movie, Josh Hamilton and Robert Sean Leonard, along with fellow actors Steven Zahn and Frank Whaley, playwright Jonathan Marc Sherman and several others. The following year, they were joined by Jason Blum — now CEO of horror film factory Blumhouse Prods. — who in his job as co-producing director would hand out flyers in Times Square to promote their shows.

“It was so fun,” says Malcolm. “I basically did it all on my own time at night, doing the bookkeeping and going to Playwrights Horizons. That’s when I knew that this is what I love.”

Hawke brought about another change in her career trajectory when he introduced her to his neighbor Lisa Loeb, a singer-songwriter who had just scored a No. 1 hit with the song “Stay (I Missed You),” featured in his movie “Reality Bites” (1994). Malcolm wanted to take Loeb on as a client, but her bosses at Peyser & Alexander told her that the company didn’t handle musicians and if she wanted to work with Loeb, she’d had have to do it on her own time. Initially, she agreed to the arrangement, but before long she left to start a film and TV department at Provident Financial Management.

Then, at Provident, Malcolm blossomed under the leadership of her new bosses John Meneilly and Richard Feldstein (now a partner at NKSFB), who encouraged her to come to meetings with them, as well as meet agents and managers on her own and seek out potential clients.

“In the beginning, you don’t have the confidence, but over time you realize you know what you’re talking about,” says Malcolm. “I still have lists from every trip to I made to L.A. with the names of who I wanted to meet and who I wanted to get to know.”

Malcolm’s career took another dramatic turn in the wake of the Sept. 11 attacks in 2001. She was at the Toronto Film Festival when the planes hit the World Trade Center, bringing down the twin towers and setting fire to and destroying WTC Building 7, which housed the New York offices of Provident. Returning to Manhattan by car, she was tasked with reconstructing the office’s files, which included



**For me, it was most important that I had somebody that I trusted as a person and was happy to talk to on the phone.” — David Duchovny**

everything from contracts to wills and insurance policies, as well as relocating the 45-person staff to a new building.

"It was right before all taxes were supposed to be mailed out and we had giant piles with hundreds of pages of each person's tax returns sitting on desks waiting to go to the post office," recalls Malcolm.

At the time, Malcolm was finalizing the adoption of her daughter from Cambodia, and the arduous rebuilding process left her no time for maternity leave. Her stress was compounded by her distaste for working under corporate giant American Express, which acquired Provident in 1997 (and sold it in 2004). When she was informed that she wouldn't be getting a raise in 2002, she decided it was time to be her own boss, and in May of that year, she launched CRM Management.

Over the years, Neuman had discussed joining forces with Malcolm, but before it could happen his firm was acquired by NKSFB, one of the largest business management firms in the country, in a deal that allowed him to retain his personal shingle. The following year, he helped convince Malcolm to take the same type of deal, keeping her professional identity while adding to NKSFB's deep well of resources, including a dedicated tax department.

"We're boutiques within a larger framework, so it's the best of both worlds, because a lot of folks still want to feel like they've got white-glove, hands-on service and are not just part of a huge company," says Neuman.

While CRM Managements now has upwards of 25 employees, Malcolm says her 100-plus clients are still getting hands-on service directly from her.

"I approve every check and every tax return, and I know how much money my clients have right now and where most of it is invested," says Malcolm. "My goal is to be slightly less hands-on, but, at the same time, if I didn't love the clients and get excited about what they do, I wouldn't want to do this." 📌



← Family fun: husband Michael Malcolm, left, Carrie Malcolm, daughter Alessandra, front left, and son Ian.



← Malcolm and early client Ethan Hawke

## CARRIE MALCOLM HAS DISCOVERED THE NATURE OF GIVING

**A big part of Carrie Malcolm's job** as a business manager is educating her clients about how to handle their finances, but when it came to the true meaning of charitable giving, it was client Ethan Hawke who schooled her.

"Over the years, we've had so many conversations about giving, [asking questions] like 'Do you give till it hurts or does it hurt because your ego is involved?'" says Malcolm.

Malcolm serves alongside the actor-writer-director's wife Ryan Hawke on the board of the Alex Fund, a nonprofit dedicated to providing early education to underprivileged children in Romania founded by his mother, Leslie Hawke.

Malcolm also sits on the board of the New York Women's Foundation and the Atlantic Foundation and is a founding board member of the Eyebeam Center for Art & Technology, but her greatest philanthropic passion is Cambodia, the country from which she adopted daughter Alessandra (known as Aly) at the age of six months in October 2001.

Malcolm has traveled to Cambodia seven times to date, and she's planning to go again next March. The first time Malcolm visited the country, she was accompanied by client Heather Graham.

"There's no safety net there and people were just living on the streets," recalls Malcolm, who also has a second child, Aly's older brother, Ian.

Graham introduced Malcolm to Scott Neeson, a former president of 20th Century Fox Intl., who left behind a 26-year-career in the film industry to launch the Cambodian Children's Fund, which became one of her pet charities. Originally established to help children living in a garbage dump in Phnom Penh, it has grown to become a wider educational initiative to for the country's impoverished youth. Malcolm is also a board member of Living Arts International, which promotes cultural development in the Mekong Region and countries of the Global South.

When it comes to her clients' charitable giving, Malcolm tries to make it as easy as possible, encouraging them to put chunks of money aside in a donor-advised fund that can be distributed to nonprofits over time.

"When people ask you for money throughout the year, you can just go there and it doesn't hurt as much," explains Malcolm. "The other good thing is that you can make your children advisors on the fund, so it helps them be more responsible with money and learn to give." 📌

— Todd Longwell



# Business Managers Elite

These experts help their clients deal with waning residuals, high interests rates and other challenges •

By Peter Caranicas, Todd Longwell, Robert Marich and Bob Verini



**Reggie Gooden, Josh Martin**  
Co-founders-managing partners  
**Kymberli Hall**  
Partner

360 Business Management

In 2022, Gooden and Martin launched what they envisioned as a one-stop shop for “Hollywood’s new elite,” led by a passion for serving clients of all backgrounds from underserved communities. One year later, the firm has quadrupled in size, hiring across its executive team and opening two L.A.-based offices. Clients include Cedric the Entertainer, actress-singer-writer Bella Thorne, Diana Nyad and Saweetie.

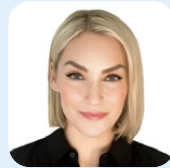
**Prep for an uncertain future:** In the current socioeconomic environment, asserts Gooden, “clients’ primary source of income can be impacted significantly and quickly. As a firm, it has been important for us to think outside the box more than ever. We are constantly encouraging clients to have multiple revenue streams so that we can hedge against events taking place on the local and global stage. ... I believe that we will still be in this state of uncertainty at least for the next few months, so my advice is to be patient, be disciplined and stay focused!”



**Belva Anakwenze**  
Principal, business manager  
Abacus Financial Business Management

The entrepreneurial Anakwenze has positioned herself as a financial educator for creators and dispenses advice and tips via her financial show on You-

Tube, which she produces and hosts for Patreon. Clients include Jay Ellis (“Top Gun: Maverick”) and Kevin Frazier (“Entertainment Tonight”), in addition to other actors, a prominent TV correspondent, a comedian and a politician. **Think positive:** Anakwenze believes turbulent times will ultimately yield a more stable and robust business climate. “The American entertainment industry is in a healthy reset that will change the trajectory of how content is produced and consumed for years to come,” she says.

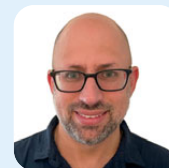


**Howard Krant**  
CEO, founding partner  
**David Levin**  
Managing director, business management  
**Lewis Stark**  
Partner, royalty audit & compliance  
**Richard Goldstein**  
Partner, business management  
**Allison Krant, Jennifer Coyne**  
Directors, sports & entertainment, business management  
**Ashley Greene**  
Manager, business management and tax  
Adeptus Partners

Adeptus permeates many sectors of the entertainment biz. Its clients include guitarist-songwriter Joe Bonamassa; the Black Crowes; Edie Falco; Wyclef Jean; Journey; Cyndi Lauper; John Legend and wife Chrissy Teigen; Indigo Girls; Jodeci; Raphael Saadiq; Tracy Letts and Carrie Coon;

fashion designer Nicole Miller; Joe Minoso and wife Caitlin Murphy Minoso; Saleka; and Justine Skye. Howard Krant handles topside business for certain clients; forensic audits and taxes; and individual clients. Levin oversees the business management practice and individual clients, working the launch of Hailey Bieber’s Rhode skincare brand. Stark engages media, sports, entertainment and corporate brand clients, and leads the firm’s royalty audit and contract compliance group. Goldstein handles entertainers, musicians, writers, directors and producers. Allison Krant, daughter of Howard, works for musicians, athletes, creatives and entertainers. Coyne handles accounting, tax, venture capital deals and sports-related businesses. Tax specialist Greene works the younger generation of actors.

**Hand holding:** Howard Krant observes that it’s an emotional decision for music clients to sell their treasured personal music catalog rights “to get money to live the rest of their lives. So, there’s a lot of therapy involved.”



**David Altman, Anthony Buonsignore**  
Managing partners  
Altman, Greenfield & Selvaggi

With Buonsignore helming the New York office and Altman running L.A., the bicoastal 37-year-old firm offers tailored service to a range of clients, including “Barbie” director Greta Gerwig, her co-writer/partner Noah Baumbach, Sterling K. Brown and Dakota Johnson. Working with prominent visual artists such as George Condo, Buonsignore has found the art scene to be “a very different world” from entertainment.

**Bullish on tech:** The bots may be making inroads, but Buonsignore remains excited by tech’s potential. “Software really streamlines what we do. When you reduce the human element, you reduce errors — though a work product will never go to the client without a senior-level person signing off on it. The client will see speed, efficiency and accuracy. You spend a lot of money to learn and train, but there’s a big return.”



### Craig Manzino

Partner

Armanino

New York-based Manzino joined Armanino in 2021 from Prager Metis, bringing with him an impressive but confidential client list that includes actors, showrunners, athletes and digital influencers. He encourages the artists on his roster to expand their monetizable endeavors: "The deeper your bench is in terms revenue streams, the better you'll be able to weather whatever the next storm is going to be."

**Upside of COVID-strike hit:** "It's easier for us to say you need to set money aside in a rainy-day fund," he says.



### Jason Zayon

Partner-in-charge, business management & family office group

**Robert Abramowitz, Catherine Catherine, Sam Levin, Marc Rosen**  
Partners

**Babette Campbell, Steve McMillan, Corey Pelton**  
Directors

Armanino

With 2,500-plus employees and 21 of-



fices, Armanino gives this entertainment-focused octet (six of whom are based in the L.A. area) a warehouse of tools to service its clients. For instance, "we're able to walk down the hall or make a quick call and get answers on how our clients are going to be taxed internationally and how it affects them in the U.S.," says Zayon. Thirty-year industry vet Levin handles writers,

directors, producers, production companies, execs and other entertainment figures, plus high-net-worth families. Catherine, Abramowitz, Campbell and Zayon have a similar mix of entertainment and family office clients, with the latter two also specializing in venture capitalists and app developers. New York-based Rosen's roster ranges from hot young actors to fashion designers and other high-income individuals from the arts and the corporate world. On the music side, Pelton handles artists, producers, independent labels and songwriters and is expert in navigating international tax challenges, while Nashville-based McMillan specializes in copyright and royalty tracking, auditing and valuation.

**AI as a tool:** "We're already using it for lower-level work like bookkeeping and paying invoices," says Zayon. "It's going to better allow people to handle value-added tasks like consulting."

Congratulations **Carrie Malcolm** and all of this year's **Business Managers Elite** honorees

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Bell & Co. advises clients such as director Steven Soderbergh, here on the "Magic Mike's Last Dance" set with star Channing Tatum.



**Evan R. Bell**  
Managing partner  
**Liza de Leon**  
Business management partner  
**Yifan Yang**  
Tax partner  
**Bell & Co.**

The firm's clients include writer-directors Robert Eggers, Cary Fukunaga, Dee Rees, Steven Soderbergh and Nzingha Stewart; writer Dan Hageman; actors Camrus Johnson and Zoe Terakes; standup comic-actor-podcaster Andrew Santino; casting director Carmen Cuba; podcaster Leon Neyfakh; and influencers Hannah Bronfman and Chris Conover. The trio is based in New York, where Bell manages the company and directly handles some clients. De Leon oversees all business management activities. Yang works projections and feasibility analyses.

**Personal touch:** Bell sees business management drifting away from direct interactions with clients in an age of automation and consolidation. "We're seeing the business lose its personal touch," he says. "I don't

know if it's COVID or technology. Clients want to see us in person." He's noticed that some new clients arrive after their prior firms randomly assigned them a new business manager, an abrupt process that rubbed them the wrong way.



**Steve Bills, Julie Krimstein, Alec Stoll, Peter Stoll**  
Partners  
**Bills & Stoll**

Peter Stoll replies with an emphatic "Are we ever!" when asked whether they continue to invest in technology. During the pandemic, he observes, one was lucky to simply keep connected with clients and staff. Now, as "the world is getting smaller and there's so much more information out there," he and the partners are determined to stay ahead of the curve in terms of using the best available tech to clients' advantage. The hybrid work model to which the firm shifted in 2022 is working "remarkably well," he reports. Still, "we are focused on trying to build

community within our firm and finding ways to get the staff together."

**Adapting to troubled times:** "Given the strikes that have occurred this year, and general uncertainty about the economy, clients are mindful about their spending and doing things a little more conservatively," he says. "They're more mindful about their financial lives."



**John Shaheen**  
Managing partner  
**Business Wealth & Tax Management**

"This year has been about saving clients money by reducing expenses and long-term planning," Shaheen reports. He has worked to maximize client revenues through income opportunities both earned and unearned, and to support community and charity causes. Client list includes Gibson Hazard, rapper Noname, the Revels Group and Burna Boy, who opened at Coachella in '19 and headlined it in '23.

**Lightning round:** Long-term impact of the strikes? "Unions will remain strong and dominant." Expected impact of AI? "It makes everything smarter, more productive and more efficient." Clients' greatest worries about the future? "Regulation and integrity." Best advice on investment choices? "Continue to invest in self, as well as in great investment advisors."



**Rit Venerus, Butch Gage, Dan Goscombe**  
Partners  
**Sarah Dellimore, Amy Self**  
Directors  
**Cal Financial Group**

The Dave Matthews Band, John Mayer, Dead & Co., Jack White, Odesza, Boygenius, Groupo Frontera, Phoebe Bridgers and a gallery of music and sports stars have put their affairs in the hands of this firm based in Charlottesville, Va., with offices on both coasts and in Nashville. Its national focus makes the company, and their clients, acutely aware of (and concerned about) the political and social divides tearing America apart, though Gage is sure that "artists who remain authentic to who they are, and connect with their fans, will always win out."

**The crisis you didn't know was affecting the biz:** Venerus observes: "We're seeing climate change impact our clients' lives more and more. The evolving weather impacts touring and productions' ability to operate, as well as their ability to obtain insurance. Clients are having trouble getting insured even if they live in places like California and Texas. Unfortunately, we are just beginning to see how climate change is going to impact our lives."



**We're seeing climate change impact our clients' lives more and more.**  
—Rit Venerus


**Layth Carlson, Steve Callas**

Partners

Callas &amp; Carlson

The Los Angeles-based duo handles directors Liz Friedlander, Antoine Fuqua and Marc Webb; screenwriter Derek Kolstad; and touring musician Colin Hay. Carlson observes that the industry handled the Hollywood labor strikes better than COVID, because the

pandemic was such an unknown. “People knew the strikes were going to end because it’s something that they have been through before,” he says, “but with COVID, nobody knew when or if.” On an upbeat note, Carlson is heartened by climbing box office numbers, despite stiff competition from streaming. “You put something out there people want to see, they’ll go see it.” As for out-of-home entertainment, he feels all demographic groups have returned to live music and concerts are firing on all cylinders.

**Jaw-dropping times:** “I can’t believe that we’ve had two shutdowns in three years! That’s brutal,” Carlson concludes.


**Lauren Cooper, Arnie Herrmann, Wayne Kamemoto, Jean Lee**

Partners

Citrin Cooperman

Citrin Cooperman boasts directors Martin Scorsese and Sam Mendes; actors Liam Neeson and Jeremy Allen White; and musical stars the Strokes and Gypsy Kings on their client list. The firm continues to expand its business management practice with the joining of Kaufman Berstein Lee & Robert in November 2022 and Chapman Bird & Tessler in January 2023. Both focused primarily on business management services to the entertainment industry and high-net-worth individuals.

Lee declares, “Our mission has always been to provide unparalleled service and support to our clients, allowing them to maintain the high level of trust they have in us for all matters, business and personal.”

**On the road again:** “Music touring has been booming for best-selling artists,” Kamemoto reports. “For them, but especially for artists where the margins aren’t so amazing, it’s imperative to budget and build tours for greater profitably in this tough economy. Other facets, such as music royalties, catalog valuations and taxes, require equal attention.”

“

**I can’t believe that we’ve had two shutdowns in three years! That’s brutal.” —Layth Carlson**

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**Sean Granat**

Partner

CohnReznick

Granat and his team service an undisclosed roster of entertainment clients, many of them high-net-worth individuals, leveraging incentives and planning opportunities that help reduce tax obligations in compliance with today's tax code. This past year, for example, the firm's tax-planning recommendations helped several clients lower their taxes when relocating from overseas to the U.S. Moreover, as touring steadily becomes a bigger part of the business side of music, Granat has helped a variety of

well-known acts maintain compliance with changing IRS regulations.

**Taxes less taxing:** "With the one-two punch of high inflation and high interest rates impacting the revenue and buying power of our clients, having a strategy and advisor that looks for ways to minimize tax obligations has never been more important," says Granat.


**Amir Malek, Pam Malek**

Managing directors

The Colony Group

Amir Malek handles music producers, TV and film actors, writers, directors, social media influencers, comedians,

DJs, executives, tech entrepreneurs and divisions of talent agencies. For European clients, he works multinational issues. Pam Malek is immersed in the post-pandemic resumption of concert touring requiring global budgeting, concert merch commerce and tax planning. She also advises financial transactions for clients' music publishing catalogs, master recording catalogs and royalty-revenue streams. The husband-and-wife team are based in Calabasas and Los Angeles. The parent company is a Boston-based investment advisor.

**Skyrocketing concert expenses:** "It has become financially difficult to tour foreign territories due to increased travel costs," says Pam. "Solutions include local promoters shouldering more expenses and lower-cost staging, such as using gigantic inflatables that are impressive visuals yet easy to transport."


**Shane Glass**

President, business management

**Paul Glass**

Vice chairman

The Colony Group

"Cash is fun again!" exclaims Shane Glass, as higher interest rates bring fatter returns on client portfolios. He handles actors, athletes, directors, entertainment estates, executives, music producers, touring artists and talent agencies. Paul Glass, Shane's father, has a roster of touring acts, singer-songwriters, actors, directors, entertainment estates, execs and producers, many of whom have been clients for 30 years.

JOHN RIGNEY

MATT LICHTENBERG

MARK FRIEDMAN

CHARLES CLANCY

MATT CATTALINI

PAUL TA

In appreciation of our loyal clients and our invaluable team,  
thank you for contributing towards our success.

**LEVEL FOUR**  
BUSINESS MANAGEMENT LLC

**Beware:** “Clients are forwarding me TikTok videos, YouTubes and social media feeds from so-called financial experts,” says Shane. “They ask me, ‘Is this legit?’ Now I’m the one breaking down complex topics into simple terms and I have to highlight the inaccuracies and embellishments or remind the clients that we have already been enacting the appropriate, valid strategies.”



**Brandy Davis**  
President

Davis Financial Group

Davis’ firm continues to grow. Clients

include a high-profile actor whose career has taken off in a big way, an NBA basketball player and a slew of writer, directors, producers and high-net-worth individuals. Davis started her independent firm in 2021 following a career that includes two partnerships in larger high-end accounting and business management firms. She finds that running a boutique gives her more time to focus directly on her clients’ needs. Recently she’s helped several of them handle business transactions in real estate and technology.

**Clever savings:** “Most of our clients were able to find creative ways to save money,” she says. “Some found expenses they no longer found value in on credit cards; others found alternatives for entertainment. Creative people always find creative solutions.”

Brandy Davis and others on the *Variety* list handle pro athletes, including NBA players.



Joseph P. Callaghan  
Mark Carter  
Thomas F. Smith  
Simon Winters

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**Pat Dunn, Mark Pariser,  
Tony Peyrot**

Partners

Dunn, Pariser & Peyrot

The partners pride themselves on having resisted the wave of mergers that absorbed many of their peers, preserving an artist-friendly environment for clients. Peyrot's roster includes actor Giancarlo Esposito ("Better Call Saul"),

DJ and record producer Joshua Paul Davis (aka DJ Shadow), and actress Taylour Paige ("The Toxic Avenger") and her husband, fashion designer Gary "Rivington Starchild" Angulo. Dunn handles actor-director Randall Park ("WandaVision," "Shortcomings") and his production company, Imminent Collision, and producer David Permut ("Rustin," "Hacksaw Ridge"), among others. Pariser's clients include producer Matt Tolmach ("Spider-Man: No Way Home") and singer Justin Furstenfeld and his band Blue October, and he's a board member and the CFO of Songwriters of North America.

**Real people:** Peyrot says that while AI can be useful for things like processing payments, "especially during a time like a strike or pandemic, clients need a heart-beating flesh-around-a-skeleton person that has that tactile experience of going through things to help guide them."



**Sally Velasquez**

Founder

Empower Business Management

Velasquez and her team of seven manage the portfolios of a diverse slate of artists including 21 Savage, Iann Dior, Jxdn, Tinashe, Dinah Jane and Amber Rose. In the past year, she has played a critical role in navigating major recording deals and renegotiated

contracts. She sits on several boards, including that of We Are R.I.S.E, dedicated to empowering preteen girls of color by reinforcing their social, emotional and developmental skills.

**AI pros and cons:** AI helps business managers sort data, automate administrative tasks and personalize marketing, "but there are risks associated with integrating AI into the way we operate," says Velasquez. "We're talking about potential job shifts, privacy dramas and the real risk of losing our human touch when creating music .... We need to harmonize AI's high-tech prowess without replacing creativity and intuition."



**We need to harmonize AI's high-tech prowess without replacing creativity and intuition." — Sally Velasquez**



**Paul Barnabee**

Director, West Coast operations

**Julie Boos**

Owner, vice chairman, VP

**David Boyer, Jamie Cheek**

Owners, VPs

**Duane Clark**

President, chairman, owner

**Carmen Romano**

Owner, VP

FBMM

Country music is in the DNA of FBMM. News reports have indicated that the firm's clients include Eric Church, Kelly Clarkson, Luke Combs, Kesha, Kings of Leon, Blake Shelton and Keith Urban. Los Angeles-based Barnabee handles music clients and has a 30-year background in music, including working at labels. Boos reps music clients, mentors junior FBMM executives and is co-chairwoman of the finance committee at Nurturing Outstanding Women. Boyer, a former recording artist, helps artist clients navigate music catalog sales, tours, charitable activities and estate planning. Cheek reps music clients, works FBMM oversight and is vice chair of finance at the Country Music Assn. Clark advises recording artists, received the Academy of Country Music Service Award last year and implements FBMM's strategic plan. New York-based Romano handles music industry clients. Boos, Boyer, Cheek and Clark are in Nashville.

**Ticket reform:** Looking in his crystal ball, Cheek predicts rapid-fire innovations in concert ticketing, such as non-transferrable tickets curbing excesses in the resale market. "I believe there will be competition and



Kelly Clarkson trusts her finances with FBMM, which handles a lot of music industry stars.

more choices for ticketing," he says. He adds that artists genuinely want affordable tickets to accommodate their price-sensitive fans who are a bedrock of the music ecosystem as buyers of recorded music.

**Christopher Curry**

Founding principal

Forward Business Management

Curry has diverse experience, both educationally (B.A. in psychology, masters in business taxation) and professionally (he was an in-house attorney for Universal Music Group). He also has a diverse roster, two-thirds of which are musicians such as Latin artists Carla Morrison and Justin Quiles, and hip-hop duo the Audibles, with the balance being film and TV talent, including actor Holt McCallany and voice actor Rino Romano, and a smattering of family offices. He likes them to make diverse investments, heavy

on real estate and stocks. He also does royalty audits for artists, law firms, record labels and catalog buyers.

**Knowing when to hold 'em:** Curry says the question is, "Will I earn more money selling my catalog now and invest it, or is it better to just let it ride and collect my royalties?"

**Andrew Meyer, Steven Rodriguez**

Founding partners

**Naomi Poblano, Tawny Nevarez, Leo Lopez**

Partners

Freemark Financial

Freemark clients include Yahya Abdul-Mateen II, Accenture Song CEO David Droga, Latin music duo Jesse & Joy, Anna Kendrick, Alexander Skarsgård and Jon M. Chu. The firm also handles ad agency Mojo Supermarket and production company Smuggler. Meyer and Lopez specialize in film and TV talent and family offices. Meyer handles Ellen Pompeo, who was presenter for an industry award Meyer received two years ago. Meanwhile, Rodriguez and Nevarez work for clients in music, TV, film and advertising. Poblano oversees tax matters across the firm. All five managers are in Beverly Hills.

**Clients at a crossroads:** "Now, unfortunately, with interest rates higher, there are challenges from the debt taken on in the past," Meyer says. And "clients have been buffeted by the pandemic and labor strikes, so individuals are also at a crossroads." Because clients need to navigate turbulent times, collaboration with business managers "is being well received and appreciated."





**Matthew Gilbert-Aranoff,**  
**Elizabeth Ricin**  
Partners

**Fulton Management**

Gilbert-Aranoff and Ricin are the rising stars at a company that prides itself on its ability to cultivate the careers of up-and-comers. That's not to say that the Encino-based firm doesn't have big-name clients, who include top film and TV talent (Chris Hemsworth, Channing Tatum, Taika Waititi, Mayim Bialik), high-profile digital influencers (Emily Ratajkowski) and world-class athletes (MMA fighter Conor McGregor). Ricin

started as a bookkeeper and was made partner in 2015. Gilbert-Aranoff, who made partner in 2020, specializes in social media stars.

**Tick-tock for TikTok-ers:** "It's not obvious that all of these creators that have younger audiences are going to keep them as they get older themselves," says Gilbert-Aranoff. "So it's a really effective tool for a lot of creators to take some chips off the table and bank the success that they've had by selling or licensing part of their YouTube catalog to a platform like Spotter."

Fulton clients Taika Waititi, left, and Chris Hemsworth on the set of "Thor: Ragnarok"



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**Howard Krant**



**David Levin**



**Richard Goldstein**



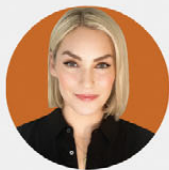
**Lewis Stark**



**Allison Krant**



**Jennifer Coyne**



**Ashley Greene**





**Tyson Beem, Grady Brown, Andrew Crow, Mark Goodman, Adriane Hibbert, David Lloyd, Melissa Morton, Enza Cohn**

Managing directors

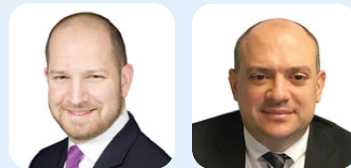
Gelfand, Rennert & Feldman/Next Gen

The team came together when wealth management giant Focus Financial partners merged GRF, which employed Beem, Brown, Goodman, Grady, Hib-

bert and Morton, with fellow business management firm WG&S in 2019, bringing Crow (sample clients: Jordan Peele and the songwriting-producing team of Mikkel Eriksen and Tor Hermansen, collectively known as Star-gate) and Lloyd into the fold. As part of a multinational company with approximately 675 employees around the globe, the L.A.-based octet can call

on a vast array of resources — including a robust royalty valuation department — to service a broad client base spanning directors, producers, actors, writers, composers, recording artists-performers, singer-songwriters, digital influencers, athletes, entrepreneurs, execs and other high-net-worth individuals. The team is forever on the lookout for cutting-edge ways for clients to expand their business models, such as branding deals, equity deals and licensing opportunities, both in the U.S. and abroad.

**The benefits of back-to-office:** “Being in close proximity to each other is hard to replicate,” says Beem. “The accidental conversations that happen in the hallways and the osmosis that happens just by being around your colleagues are really important to the mentorship of employees, so we encourage people to be around each other as much as possible.”



**Christopher Fazzolari, Jon Menneci**  
Managing directors

Gelfand, Rennert & Feldman/Royalties-Audits

Fazzolari and Menneci lead a bicoastal team that advocates for copyright owners, making sure that they get every micro-penny they’re due from their contracts, which can be hundreds of pages long, with no language addressing the complex tangle of modern distribution platforms, from streamers to exercise equipment. They also do valuations of royalty streams for potential catalog sales for GRF clients and outsiders alike, as well as the estates of recently deceased artists, particularly for tax purposes.

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**STEVEN SHAPIRO**

ON ANOTHER YEAR OF BEING NAMED AS

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**Microscopic math:** “There’s only a finite amount of money that, say, a DSP collects, yet there are trillions of streams,” says Menneci. “And you’re dealing in micropayments per stream and how the money is divided up.”



Mike Skeet, Simon Hopkins,  
Jeff Kaye

**Managing directors**

Gelfand, Rennert & Feldman/U.K.

Gelfand, Rennert & Feldman’s acquisition of London-based firm Skeet Kaye Hopkins in 2019 gave the firm a major presence in the music touring world, with a roster of clients that ranges from breaking artists to veteran stadium-fillers. These days, Skeet spends most of his time in Los Angeles, while Hopkins and Kaye man the U.K. office.

**Fighting inflation with inflation:** The price of everything is up for touring artists, from the trucks, buses and fuel that it takes to transport them to the food they eat and the hotels they stay in. To make up for it, acts are raising ticket prices and offering platinum packages with backstage meet-and-greets. Skeet says European fans are less willing to spend big than their U.S. counterparts. “I see it in sporting events and in concert tickets,” he says. “A courtside seat at a Lakers game is

in the three- or four-thousand-dollar range, and that’s not even for playoffs. If I’m going to see Arsenal play soccer in London, the most expensive seat I can buy is maybe £150.”



**Todd Kamelhar, Anton Pamer**

Managing directors

Gelfand, Rennert & Feldman/N.Y.

Kamelhar and Pamer’s roster is a diverse cross-section of film, TV, music and fashion industry pros. However, their practice does have a touch of glamor via Kamelhar’s long association with client Billy Joel, for whom he has exec produced a string of concert

films, including 2019’s “Hot Spotlight: Billy Joel and the Greatest Arena Run of All Time,” about the piano man’s historic Madison Square Garden residency that will end in July 2024.

**High-interest bummer:** “It was a tough pill to swallow for clients who were trying to buy their first home or had been in an extremely competitive market like Los Angeles, waiting on the sidelines watching the interest rates increase, because the size of those mortgage payments for those looking to finance properties went up substantially,” observes Pamer.

“

**It was a tough pill to swallow for clients who were trying to buy their first home.” — Anton Pamer**

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YOUR TEAM AT FULTON MANAGEMENT

**FULTON**  
M A N A G E M E N T



**David S. Garelick**  
President-CEO

**Luis Gomez**  
Account manager  
Global Business Management

Garelick has been at Global Business Management for 36 of the firm's 63-year history. Today, he has a client stable that includes Anthony Hopkins, Ernest Thompson and Robert Nagle, director Bethany Rooney ("The Blacklist"), celebrity stylist Cristina Ehrlich, numerous NFL players (including Juju Smith-Schuster of the New England Patriots), Randy and Kristy Pitchford, the CEOs of Gearbox and Nerdvana, respectively, and DJs including DJ Vice, as well as Sujit Kundu, president and CEO of SKAM Artist Management. Gomez started as an assistant at the firm 13 years ago and worked his way up to account manager overseeing 20 clients, including actor-musician Ronny Cox.

**Disaster-proofing:** "I like to try to have all our clients have at least three to six months of reserves, depending on their cash flow needs and their other investments, for strikes or other unforeseen events," says Garelick

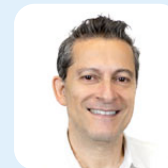


**Laura Gordon**  
Founder & CEO

Gordon & Associates

The 31-year-old firm catering to athletes, entertainers and high-net-worth individuals is now something of a family affair, with Gordon's son Isaac, a CPA and international MBA, becoming the firm's managing partner. "He's much more of a technology person than I am, and he's helping us to stay on the leading edge of our industry, servicing our clients on a higher and more efficient level," says Gordon. Still, she says that doing right by clients and their families is integral to the mix. "The relationships part is old school, and the new technology is new school."

**Giving back:** Gordon took advantage of COVID down time to earn her doctorate at the Jakes Divinity School. Her dissertation led to "Back to Eden" projects in Uganda, Zambia, Ghana and Nigeria, working with local experts and pastors to identify "ecologically based entrepreneurial problems and solutions. We are training and coaching people," she says. "If they don't get their hustle on, they're not going to get a job."



**Andrea Bacon, Mark Borda, David Coronel, Tom Fouladi, Peter Mainstain, Rachel Martinez, Craig McCormick, Gary Satin, Vera Singartiyska, Jeremy Stahl, Bill Tanner**

Managing directors

Ground Control Business Management

Now a hefty player in the business, Ground Control boasts a wealth of business management experience. Bacon works a particularly diverse client roster of actors, directors, producers, screenwriters, studio executives, musicians, composers, photographers and publishers. Borda's clients are

attorneys, directors, entertainment executives, producers and writers. Coronel handles entertainment industry pros as well as high-net-worth individuals in other industries such as real estate. Fouladi covers the entertainment and pro sports industries, as well as entrepreneurs. The practice of Martinez is broad across entertainment industry from traditional to digital, including influencers. McCormick handles actors, comedians, studio execs, TV showrunners, talent reps, and their business entities domestically and overseas. A second-generation business manager, Satin launched his practice with music clients, and then added actors, writers, directors, producers and entertainment executives. Singartiyska handles an array of entertainment pros and also clients outside entertainment, and is a go-to resource for international tax planning. Stahl's clients include musicians, actors, directors, producers, studio executives, writers and estates, including outside of Hollywood. With nearly a half-century experience, Tanner handles entertainment clients and others. Mainstain handles Wayne Brady, keynote speaker at this year's *Variety* Business Managers Elite breakfast.

**Building trust:** Satin thinks that business managers need to retain the personal touch even as digital tools make it easy to automate the client relationship. "It is not just about sitting in front of your computer sending emails," Satin says. "It's about fostering that trust and conversation."

David S. Garelick's client, former Kansas City Chiefs standout Juju Smith-Schuster, left, had four catches in Super Bowl LVII vs. the Philadelphia Eagles.





**John McIlwee**

Founding partner

**Alex Grissom**

Senior business manager

**Jason Kassin**

Tax director

J. McIlwee &amp; Associates

The boutique grew 20% in 2023 after experiencing 40% growth during the pandemic, in part due to the increasing number of digital influencers rep-

resented, such as TikTok stars Chris Olsen and Dylan Mulvaney, as well as the career diversification of other clients into brand deals, commercials and stage work. The roster also includes Matt Reeves and his production company 6th and Idaho; actors Maura Tierney, Selma Blair, Caleb Landry Jones, Valorie Curry, Christian Serratos and actor-host Jane Lynch.

**The price of strike gains:** "Either the studios are going to pay for it or it's going to be paid for in the result of less jobs," says McIlwee.



**You don't really know how much you're spending until the revenue's not coming in."**

**—Jason Schneider**

**Gary Schneider**

Managing partner

**Jason Schneider**

Partner

Kessler, Schneider &amp; Scheltinga

For the past nine years, father and son duo Gary and Jason Schneider

have been working side-by-side at the boutique firm founded 37 years ago, which prides itself on the intimate, friendly service it provides to a clientele that is approximately 95% entertainment. Gary's roster includes actors Alyson Hannigan and Ed Helms and showrunner Carol Mendelsohn ("CSI"), along with execs, talent agencies and management companies, while Jason handles Steve Yockey (creator of "The Flight Attendant"), Andrew Goldberg (co-creator of "Big Mouth"), writer Stacy Osei-Kuffour ("The Morning Show") and actor Jimmy Tatro ("Home Economics").

**Generational shock:** "Most of my clients weren't in the business for the last strike in 2007," says Jason. "You don't really know how much you're spending until the revenue's not coming in. We were watching cash flow as we were applying for WGA loans. It's been a really difficult time."

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**John Rigney, Mark Friedman,  
Matt Lichtenberg, Charles Clancy**  
Partners

**Mark Cattalini, Paul Ta**  
Executives

**Level Four Business Management**

Level Four roots can be traced back to 1987, when Rigney broke from Jess Morgan & Co. to start his own firm with a handful of clients that included a little-heralded actor-comedian named Jim Carrey. In the decades since, the West Los Angeles boutique firm has added partners and grown its large array of top-tier talent. In addition to Carrey, Rigney's clients include actors Samuel L. Jackson, Danny McBride and Jenny McCarthy; directors Kenny Ortega, Luc Besson and James Widdoes; and television writer-producers Salim and Mara Brock Akil and John Mankiewicz, and director Aaron Lipstadt. Friedman has Quentin Tarantino. Lichtenberg's clients include Will Ferrell, writer-director-producer Adam McKay and the top podcaster Joe Rogan. Clancy handles filmmaking duo Phil Lord and Chris Miller and Cattalini has showrunners Patrick Somerville and David Weil, while Ta handles Cheech Marin and Limp Bizkit leader Fred Durst. Rigney was *Variety's* Business Managers Elite honoree in 2022.

**Conditioned for disaster:** "After dealing with COVID lockdowns and everything that happened, it's almost like we were used to total disruption," says Cattalini. "And up until the [WGA] strike, everyone had been working, so people were in a better position to weather a storm."

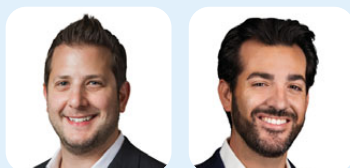


**Marius Bercovici, Justin Kobay,  
Bruce Seckendorf, Venecia Metsey**  
Partners

**LL Business Management**

The firm, founded in 1994, has offices in New York and Los Angeles and specializes in personal and corporate financial management, including tax and estate planning. Areas of expertise include tax compliance, multistate filing, tax preparation and audit representation. Clients come from the worlds of entertainment, music, fashion and sports. Among them: Boots Riley, Kylie Cantrall, Lil Nas X, the estate of Juice Wrld, Timbaland and Ice Spice.

**Simple approach to success:** Bercovici expresses succinctly the firm's initiatives and accomplishments over the past year: "Having clients ready for the writers strike, keeping afloat, touring, branding."



**Steve Gelon, Van Lee,  
Alex Smith, Justin Sroka**  
Partners

**Mann Gelon Glodney Gumerove Yee**

In recent years, Mann Gelon has hired new employees with niche specialties, from royalties and touring to insurance, and that diversity is reflected in the partners. A 38-year vet of the firm who's been managing partner



Lil Nas X takes financial advice from LL Business Management.



**Michael Kaplan**  
Managing partner

**Justine Ruffalo**  
Partner

**Miller Kaplan**

Based in North Hollywood, the firm has offices in San Francisco, Seattle, Denver and Hailey, Idaho. Kaplan specializes in clients from movies and TV, global influencers, and individuals of high net worth. Ruffalo's beat is the music industry, working with both performers and execs.

**New opportunities in the music biz:** "The number of alternative investment funds holding artists' IP rights has grown over the past decade, giving artists more options to monetize their IP," reports Ruffalo. "Some of my clients, such as Iconoclast, have been able to take advantage of this unique moment in time to acquire legendary catalogs and other assets. On the flip side, we have also been able to leverage this robust market and our expertise as a way to help musicians on our roster who want to sell their catalog and find investors who align with their own creativity and innovation."

since 1990, Gelon has a client list that includes big TV stars, a gaggle of top series creators-showrunners, acclaimed feature writers and directors, and a boutique entertainment law firm with its own legend-packed roster. Smith, who joined in 2015, reps an array of film and TV writers and directors, producer-songwriters, musical acts and household-name digital influencers. Lee came aboard in 2018 and specializes in handling the estates of iconic show biz figures on both sides of the camera. The newcomer of the group is Sroka, who joined in 2020, bringing with him a several members of the Rock & Roll Hall of Fame, along with film and TV legends and up-and-comers.

**Surviving the strikes:** "If you're working with investment advisors, it's figuring out whether you potentially have to sell positions that have unrealized capital gains or whether there's the opportunity to tap equity in a home, because that's liquidity that you can get without a taxable event," says Smith.



“

**[Clients pay closer attention to] their investment portfolios and related performance. This occurrence has happened as stock market performance has been volatile and interest rates have increased multiple times.” – Mickey Segal**



**Mark Landesman, Paul Zukowsky, Scott Landesman**  
Partners

**Jessica Mooney**  
COO  
ML Management Partners

The New York-based team covers entertainment broadly, with a deep client base in the comedy field, dating to firm's founding in 1988. Mark Landesman reps many comedy talents, and he also handles actors, directors, producers and writers. He shares some major clients with Zukowsky, whose own clientele includes actors, directors, music and models, with a growing roster of teenage models. Zukowsky also handles Steve Jordan, now drummer for the Rolling Stones. Scott Landesman, son of Mark, works with comedy figures, especially touring comedians, and podcasters.

**Shifting client needs:** Zukowsky says that client portfolios these days tilt more heavily to T-bills and bank accounts to tap growing yields as interest rates soared. Plus, clients seek more analysis amid economic hardships after the pandemic lockdown and Hollywood strikes. Instead of simply saying that they want to buy a house, Zukowsky says that clients “call for things that they never asked about in the past such as where should they live, should they move and should they own or rent.”



**Mickey Segal**  
Managing partner, NKSFB

**David Bolno**  
Name partner, NKSFB

**Michael Karlin**  
Founding partner, NKSFB

**Thomas Kingsley, Matt Segal, Larry Tyler, Dian Vaughn**  
Partners, NKSFB

**Bernie Gudvi**  
Founding partner, NKSFBGO, a division of NKSFB

**Carrie Malcolm**  
founding partner, CRM Management, a division of NKSFB

**David Weise**  
Founding partner, David Weise & Associates, a division of NKSFB

**Harley Neuman**  
Founding partner, Neuman + Associates, a division of NKSFB

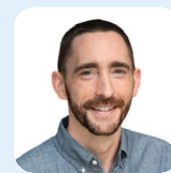
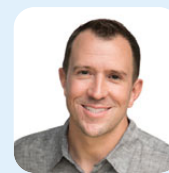
**Ryan Conlon**  
Partner, Neuman + Assoc., a division of NKSFB  
NKSFB

The influence of NKSFB's large staff and roster of clients is felt across the entire entertainment and music ecosystem. Mickey Segal leads what is Hollywood's largest business management firm, employing 670 persons including 52 partners. Bolno handles

music talent including helping clients with acquisitions. Karlin works for music clients including advising on music catalog sales. Vaughn handles actors, authors, composers, directors, execs, musicians, producers and screenwriters. Tyler reps music talent. Matt Segal, who is the son of Mickey, handles a diverse clientele including their charitable initiatives. Gudvi reps music talent and high-net-worth persons. Kingsley handles Hollywood, sports, music and entrepreneurs, lately busy with real estate syndication investments. Malcolm reps indie film-TV talent, international talent and production companies. Weise handles music clients who resumed touring and also advises on music catalog sales. Neuman advises clients on their Hollywood housekeeping deals, concert touring and Broadway work. Conlon handles talent in film, TV, music and social media, including their entrepreneurial side ventures. All are in the Los Angeles area, except New York-based Malcolm. The firm is a unit of Focus Financial Partners and

NKSFB filed a legal action in June for a court to interpret the enforceable terms of the current noncompete. Reports indicate clients include Drake, Adam Levine, Bruno Mars and Katie Perry. In the past 16 Super Bowls, the firm's music clients performed for 14 half-time shows.

**Navigating stormy waters:** Amid financial and global instability, Mickey Segal notes that clients pay closer attention to “their investment portfolios and related performance. This occurrence has happened as stock market performance has been volatile and interest rates have increased multiple times.”



**Mike Merriman**  
President

**Bryan Gott**  
Director of business management  
Parr3

Parr3 clients, provided off-the-record, read like a who's who of top recording artists and producers. Merriman helped clients successfully execute some of the largest tours of 2022-2023. He also protected songwriter clients in collecting their royalties and making wise decisions regarding catalog sales and publishing deals. On the creative side, he advised clients on new ways to build sustainable lifestyles and create long-term wealth. Gott guided the firm's account managers and helped clients navigate the rising interest rate environment and a changing real estate market. He also continued development of royalty-hunting protocols throughout the team and launched a semi-annual royalty review program where clients and their teams receive birds' eye views of their royalty landscape. He also supported the LVRN label in its recent transaction with Matt Pincus' holding company, Music.

**Leading the way:** Parr3 prides itself on its internal training program to elevate the firm's emerging leaders, and on its embrace of a fully remote-optional work environment.

**Joseph P. Callaghan**

Partner, New York

**Mark Carter, Simon Winters**

Partners, London

**Thomas F. Smith**

Partner &amp; entertainment industry leader

Prager Metis

The four have large client bases in music, and their rosters also extend into TV and film. Callaghan works with entertainers and high-net-worth individuals and specializes in family office and business management services. Carter works with musicians, film and TV actors, directors and athletes; Carter also helps his clients manage their international tax obligations and capture

available tax credits. Smith works with entertainment clients in music and TV, production companies, and corporate CEOs. Winters has clients in entertainment, music and sports, as well as high-net-worth individuals.

**Cost control:** With live concerts enjoying a strong comeback post-COVID, Smith says that the touring industry faces cost pressures across the board. On stage, he says, artists will have “a certain vision of what the fan experience should be, and you take that into account, but it’s also important to remember that it’s a business and costs need to be kept top of mind.”



Crowds are back at concerts but Thomas F. Smith notes that costs have increased for tours, including venues, transportation, staging and vendor deals.

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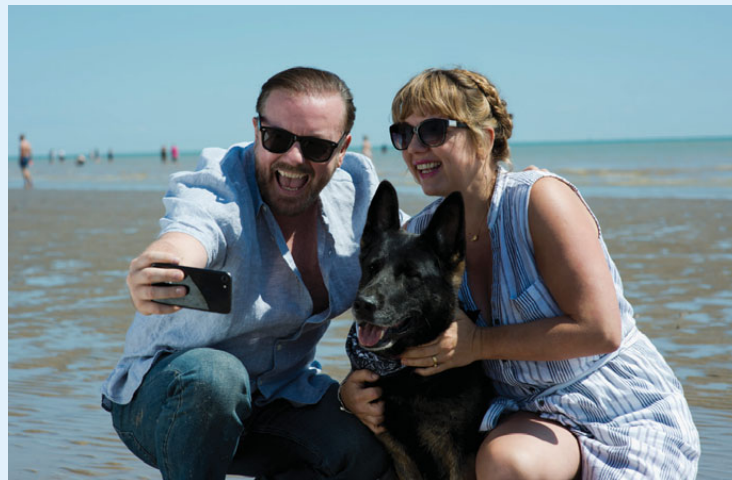
**Larry Einbund, Lisa Ferguson,  
Dawn Nepp, Joni Soekotjo**

Managing directors

Provident Financial Management

The merger of Provident Financial Management with Ferguson's Woodland Hills-based Premier Talent in 2017 yielded two major benefits. It added an outpost in L.A.'s San Fernando Valley, alleviating the commutes of employees who previously had to travel the congested 405 freeway to get to Provident's Santa Monica headquarters. It also brought into the fold Ferguson's stable of talent that includes actors, directors, producers and costume designers, as well as rock band Queen.

Santa Monica-based Einbund, who has spent the entirety of his 39-year career at Provident, works primarily with music acts ranging from the Goo Goo Dolls, a client of nearly three decades, to Mongolian heavy metal band the Hu. Nepp heads the Nashville office, created when Provident acquired her firm in 2016, serving a clientele that encompasses the music, television, film and live events. Soekotjo, who leads the San Francisco office, has a client roster that includes Ricky Gervais, film and TV composer Jeff Russo, music acts (Genesis, Billy Bragg), record producers and independent labels.



Joni Soekotjo client Ricky Gervais stars in "After Life" with Kerry Godliman.

**Future of commercial real estate:** With the rise of remote work and the closing of retail stores, "we're going to start seeing a lot more mixed-use properties and in the next five to 10 years," says Einbund.

*"Great things in business are never done by one person.  
They're done by a team of people".*

— STEVE JOBS

**PS Business Management would like to thank  
*Variety* for the recognition, and our entire team  
for their tireless work on behalf of our clients.**

**Congratulations to all of this year's honorees.**

**PSBM**

PS BUSINESS MANAGEMENT LLC

NYC LA NSH NOLA



PS Business Management client Billie Eilish performing in London in August.

#### Phil Sarna

founder, senior managing director

**Patrick Templeman, Tara Moore, Abner Monegro, Amy Gittleman-Blom, Andrew Britton**

Partners

#### PS Business Management

With offices in New York, Los Angeles, Nashville and New Orleans — and a support staff of over 80 pros with experience in tax accounting and finance — this team of six handles a practice heavy on talent in film, TV, music, sports and fashion. It has been reported that their clients include Billie Eilish, Lizzo, Halsey, Benny Blanco, Sara Bareilles, Andrew Watt, Preservation Hall Jazz Band, Camila Cabello, the National and Arcade Fire.

**Where creativity meets business:** Sarna believes that his clients' entrepreneurial spirits and business acumen fuse well with their creative spirits to bring out the best in their careers.



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**Anna DerParseghian**

Managing partner

**John Power**

senior partner

**Jason Brown, Leo Jenkins, Darren Calbay**

Partners

PTD Business Management

The five have wide perspectives on the world these days. The firm moved into a penthouse suite atop the Sherman Oaks Galleria that sports views of the San Fernando Valley and doubles space for growing staff. "Now we have a little bit of room to breathe," quips Brown. DerParseghian is partner in charge and handles multihyphenate producers, touring comedians and persons in music. Power works big negotiations involving business M&A and has a roster of his own clients. Brown is focused on Hollywood talent, multihyphenates, touring clients, and is resident expert on analytics for digital businesses and merchandising businesses of clients. Jenkins handles live touring, comedians and entertainers, and continues to grow his podcast and digital media practice. Calbay is the tax authority who advises and sorts out complex matters across the firm for clients.

**Business lessons:** The entertainment industry is a creative business, and Brown notes that clients who are world-class in the arts may be less hip to the business side. "I like to explain the hows and whys in a simplified format," he says. "That sparks a good conversation."

Reback Lee & Co. rep all the top awards shows, including the Tonys, right.


**Alan Reback, Derrick Lee**

Founding partners

Reback Lee &amp; Co.

Reback and Lee's L.A. firm scored its third EGOT in a row in 2023, not by winning awards, but by providing production accounting services for the shows where they were handed out: the Emmys, the Grammys, the Oscars and the Tonys. The duo began working together in 1995, when Reback did production accounting work for one of Lee's business management clients, and they formed their firm in 2004. Today, they service a mix of actors, producers, writers, directors, executives, fine artists, as well as other high-net-worth individuals, along with production companies, particularly those that do TV specials and live events, with Lee handling business management and tax, while Reback handles business management and production accounting.

**Staying put:** During the lockdown, the firm saw clients leave California

and move to places like Tennessee for more open spaces and lower tax rates, but "with the higher interest rates on the mortgages, they're not buying and selling like they used to," says Reback


**Andrew B. Blackman, Wesley W. Childs, Robert Grubman, Ron Myers, Marc Zand**

Partners

Schulman Lobel

An impressive diversity of clients characterizes this firm. They include Don Buchwald of talent agency Buchwald; actor Brian Cox; rapper French Montana; DJs the Martinez Brothers; graffiti artist Futura; and touring jam bands the Disco Biscuits and Joe Russo's Almost Dead. Other clients are Hollywood PR agency the Lede Co.; and the estates of William Goldman, Gwen Verdon and Bob Fosse. Childs is based in Miami, Myers in Los Angeles and Blackman, Grubman and Zand are in New York. Collectively, the five head the entertainment practice at Schulman Lobel, a full-service, mid-sized accounting firm. Childs, who became partner in February, handles clients and is building Florida as a third geographic hub, either through organic growth or acquiring an existing practice.

**The taxman cometh:** Childs advises clients who are on the move to look before they leap because of the "much more aggressive stances taken by states in terms in challenging residency and sourcing of revenues. So proper planning and strategizing before any physical move or contracting of work is necessary to reduce financial exposure and reduce state scrutiny."



**Scott F. Guber**

President

SFG Business Management

Guber's clientele encompasses actors, film and television producers, directors, newscasters, talent managers, writers, high-net-worth individuals and a growing number of influencers earning income from their posts. Those clients include comedy actor-writer Damien Fahey ("Family Guy"), director-producer Anthony Hemingway ("Red Tails," "Genius: Aretha"), director-producer Vince Marcello ("The Kissing Booth") and director-producer Greg Mottola ("Superbad," "Confess, Fletch").

**Peaks and valleys:** Guber is a big believer in rainy day funds. Those clients with non-guaranteed income "have to save for those lean times," he says. When encountering resistance from a client whose career is riding high, Guber points to news reports of industry figures whose careers conspicuously cooled. Then, he shows them how it's possible to remain financially stable.

**Rick Shephard**

Founding partner

**Mark Tinglof**

Partner

Shephard Tinglof + Associates

Clients of Los Angeles-based Shephard Tinglof + Associates reportedly include Courteney Cox (since pre-"Friends"), Jon Favreau (since 1996's "Swingers") and Ben Stiller (since 1998's "There's Something About Mary"). The firm is also said to handle Kurt Russell and son Wyatt Russell, Meredith Hagner, Jeff Kleeman, Alan Poul, David Schiff and Narrative Media.

**Restaurants and boats:** In the past, Shephard has advised clients against two types of investments: restaurants, which he considers not worth the risk, and yachts, which can bring momentary delight until their owners decide to get rid of them.

Singer Burke's clients include individuals employed by Netflix hit "Queen Charlotte: A Bridgerton Story."



# PARR3 LLC

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**Matthew Burke**

Managing partner

**Elaina Kogan**

Tax partner

**Richard Singer, Stephanie Arkof,**

Wealth management partners

**Marianna Krasnoshtein**

Accounting manager

**Kurt Vogel**

Business management operations manager

**Singer Burke**

Singer Burke's work has won clients from throughout the business, including some employed on TV series "Bridgerton" and spinoff "Queen Charlotte: A Bridgerton Story," "The Family Guy" and "The Walking Dead." Clients include actors, composers, directors, producers, showrunners, writers and management-production companies. All seven

business managers are based in Encino. The firm also operates a separate registered investment adviser arm, SB Capital Management, that has \$1 billion under management. Burke handles clients and company management. Kogan works tax liability and strategic direction for the tax practice. Singer serves clients, including sizing up private investment opportunities. Arkof helps his client roster pursue their financial objectives. Harichandran works on compliance issues. Krasnoshtein focuses on helping clients attain their objectives. In addition to his own roster, Vogel works company-wide.

**People vs. AI:** As office automation engulfs business management, Burke says that an industry challenge is not to lose the human touch. Otherwise, clients will wonder, "How do you trust a chatbot or ChatGPT? You can't really. They don't have the core values or humanity of a real person."

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**JOSH KLEIN**

CEO AND MANAGING PARTNER

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**Rick Schenkel**  
Managing shareholder



**Steve Levitt**  
Shareholder



**Marta Botten**  
Principal

*Sobul, Primes & Schenkel*

Schenkel launched the firm's business management practice back in the '80s, when the new tech disrupting the entertainment industry was VHS and

Betamax. Today, his personal clients include an Emmy-winning director-writer-actor, showrunners, execs, entertainment companies and some of the most high-profile talent agents in the biz. Levitt, who joined the firm in 1996, has a client roster highlighted by a pair of Oscar-winners (an actor and a writer), a bestselling author, numerous business execs and accounting outsourcing services for a film production and financing group. A 30-year industry vet, Botten came aboard in 2019. She specializes in music tour budgeting and accounting and royalty accounting. Additionally, she manages the firm's day-to-day business management practice.

**AI is our friend:** As the overseer of the firm's operations, Botten has a vested interest in the potential of AI and other cutting-edge tech. "All of that reduces time that staff spends on tasks," she says. "Our relationship with our

clients is based on personal trust and our ability to understand their needs, and I'm eagerly waiting for AI to be able to detect fraud, which is one of our biggest industry nightmares."



**Steven L. Shapiro**  
Owner-founder

*Summit Business Management*

This Woodland Hills-based boutique boasts Taylor Sheridan ("Yellowstone," "1883," "1923"), as well as Emmy-winners Zendaya ("Challengers") and Aaron Paul ("Westworld"); actor-producer-host Vanessa Hudgens; the legendary song parodist "Weird Al" Yankovic;

and a large contingent of writing clients who Shapiro expects, in wake of their Guild's strike, "will now alter their lifestyles to accommodate an inconsistency of income and a consistency of expenses."

**Wither business managers?** "AI is the hot topic and is going to be more than a paradigm shift," says Shapiro. "It will be an integral part of our lives, especially within the entertainment industry. Even business managers will eventually be replaced by AI — and of what I can see, some already have!"



**Even business managers will eventually be replaced by AI." — Steven L. Shapiro**

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**Steve Gelon, Alex Smith,  
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**Josh Klein**

CEO &amp; managing partner

TKG

The Chainsmokers, Charlie Puth, Modest Mouse, Big Sean, Kelly Rowland, Anitta and others from sports and music are Klein clients. He prides himself on going the extra mile in protecting assets: During COVID, for instance, clients were given guidance in building contingency plans for savings. He's convinced that for all the efficiencies AI will bring, "you can't replace a personal relationship one has with their money and the person they seek advice from."

**Coming to our senses in 2024:** "I see

people heading back to safe, stable and tangible investments such as stocks, bonds, money markets, real estate. The high-risk stuff — venture, crypto — has cooled off in the recent years with volatility and high valuations. The good news is the people that are left standing will have a lot of opportunity," Klein says.

**Joe McGill**

Owner-founder

Topline Business Management

Topline is one of the few solely Black-owned Hollywood business management firms. McGill left one of the Big



Steven Shapiro reps Zendaya, flanked by "Challengers" co-stars Mike Faist, left, and Josh O'Connor.

Four to give entertainment clients a more personal and tailored experience. He is particularly proud to have on his list Karamo Brown, the first Black gay host of a daytime talk show; "Karamo" premiered nationwide on Sept. 19. His recommendation for investment today is "T-bills, where interest rates are paying out between 4-5%.

It may not be sexy, but it is safe."

**Silver lining:** "In a bit of a twist, the shutdown taught clients how to preserve their money and be mindful of it," says McGill. "Since we all knew that at the very least the writers were going to strike, there was enough planning to look ahead and come up with a game plan."

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**Dwight Wiles**  
President

**Robert Taylor**  
VP

**Kevin Dalton, Steve Eggart**  
Business managers  
*Wiles + Taylor*

Based out of Nashville, the firm weathered the pandemic through a combination of what Eggart calls “budgeting and taking advantage of nontraditional opportunities in the touring world” to tap into such revenue sources as livestreams and private shows. Clients, who are not publicized, include some major artists and execs, particularly in music. The firm enjoys



a partnership with Do Write Music for music publishing administration and clearance services. Do Write Music is headed by veteran administrator Marghie Evans.

**Concerns for the future:** “From a touring perspective,” Eggart reports, “increased costs are at the forefront of our regular conversations. While ticket sales are doing incredibly well post-pandemic, the costs associated with being on the road have increased substantially, and there’s a scarcity of buses, trucks, equipment and personnel, causing prices to rise with increased demand.”



**Adam Yorkshire**  
Partner-founder

*Yorkshire Management Group*

In addition to actors and athletes, this boutique firm handles several musicians and has expanded its touring department to meet their growing needs. Yorkshire notes that even on the same tour, each night is unique. What tours provide fans, he says, is memories — the ability to remember

what it was like and say, “I was there, then.” He sees this experience as irreplaceable among concertgoers. The concerts themselves, he believes, are often defining moments in people’s lives and he remains confident that the concert industry will continue to flourish.

**All together now:** “Even in light of waning confidence in the economy, 2023 has shown beyond any shadow of a doubt that people still love the shared experience of going out and listening to live music, seeing their heroes on stage, feeling the feelings of the first, or 750th, time they’ve heard their favorite song during a unique live rendition,” says Yorkshire.



**People still love the shared experience of going out and listening to live music.” — Adam Yorkshire**



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Many cheers to all our fellow honorees.