

MGI Worldwide members share their story

A successful London to New York referral helps an important consultancy client with operations in several markets all over the USA and the world.

MGI UK & Ireland member and London-based firm F.W. Smith, Riches & Co. represent a number of international groups, and when their client, a global treasury and risk management consultancy with offices in New York, London and Singapore, were looking for new advisors in the U.S., they knew they could rely on their MGI colleagues to help.

Jane Lowden and Martin Rooney, Partner and Senior Partner of F.W. Smith, Riches & Co. contacted MGI's New York City-based member firm, Hoberman & Lesser, CPAs, LLP.

Robert Hoberman, Managing Partner of Hoberman & Lesser, commented: "Since we are the MGI New York member firm, it was natural that our London-based MGI colleagues would collaborate with us for an important client that has a presence in New York City.

"The fact that Hoberman & Lesser is registered with the Public Company Accounting Oversight Board (PCAOB) and is a member of MGI gave the confidence they needed, particularly because their client provides treasury functions and is a very sophisticated financial entity."

Building trust across borders

Robert explained: "We needed to communicate with Jane and Martin to get an understanding of the past history of the client's dealings in the US, as well as a current understanding of their operations and plans for the future."

Jane initially asked questions about payroll practices, tax laws and general business practices in the US before she introduced us to her client.

"We had to establish a relationship with the client that would give them comfort that they would receive a high quality service."

With Managing Partner Robert Hoberman handling the client, this instilled a greater level of confidence in them, securing that trust and forming the basis of a successful working relationship.



Robert Hoberman, Managing Partner of MGI North America member firm Hoberman & Lesser CPAs, LLP, USA

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Jane Lowden, Partner of MGI UK & Ireland member firm F.W. Smith, Riches & Co., UK

"Our membership of MGI gave us the assurance that we could refer important client work to a member firm who would offer the same partner-led service that we pride ourselves on."

MGI Member Firms involved

F.W. Smith, Riches & Co.

Hoberman & Lesser, CPAs, LLP

MGI Alliance Singapore PAC

A successful UK-U.S. referral

The referral has been a success, with Robert stating that the client “gets the level of service that they had hoped for from their accounting and advisory service provider.”

Hoberman & Lesser has gained a new, satisfied client, and successfully made an international client comfortable with its knowledge and service level. The New York City firm has also formed a new professional relationship with F.W. Smith, Riches & Co., with Robert saying: “We plan to leverage our experience by providing services to additional clients of F.W. Smith, Riches & Co., and we also hope that our client that provides outsourced treasury functions will have the opportunity to refer some of their clients to us.”

From London to New York and Singapore

Jane Lowden Partner of F.W. Smith, Riches & Co. commented, “Our membership of MGI gave us the assurance that we could refer important client work to a member firm who would offer the same partner-led service that we pride ourselves on. We have also been able to refer work to MGI’s Singapore-based firm following their recent expansion there.”

Jane added, “It’s always really exciting to work with clients that are expanding, and we would be delighted to assist any member firm with clients that are looking to expand in the UK, in particular London.”

Advice to fellow members

Robert passed on some advice to fellow MGI Worldwide member firms, saying: “Take the time to respond to all inquiries, learn about the potential client, have patience with them and give them advice that will help them feel comfortable about retaining you as their service provider.”

MGI Worldwide is a top 20 ranked global accounting network with some 5,000 independent auditors, accountants and tax experts in over 260 locations around the world.

Thank you to MGI Worldwide members:



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MGI Alliance Singapore PAC is a trusted Practice built on strong relationships with its client and member of MGI Asia region, located in Singapore.



Hoberman & Lesser
CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS



Get in touch

Do you have a Member Success Story that you would like to share? Contact maxine.brock@mgiworld.com

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