



New York 2025

# Annual Global Conference

## FRIDAY 15<sup>TH</sup> NOVEMBER – MORNING

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- 09:30**      **BOKS Update**
- 10:00      Break
- 10:10**      **Round Table Networking**
- 11:10      Break
- 11:20**      **Round Table Networking**
- 12:20      Lunch By Region

## FRIDAY 14<sup>TH</sup> NOVEMBER – AFTERNOON

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<b>13:20</b>	<b>Future Events</b>
<b>13:45</b>	<b>Panel: The New York Playbook</b>
14:45	Break
<b>14:55</b>	<b>Break Out Sessions</b>
15:40	Break
<b>15:50</b>	<b>Closing Statements</b>
<b>16:00</b>	<b>Thinking Outside the BOKS</b>
15:40	Close

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# Alliance Update

Kenny Burke



**Kenny Burke**

Operations Director  
BOKS International

# Recap on Goals

- Fees between \$1-2bn (top 5 are \$3bn+)
- Circa 400 members worldwide
- Global Ranking - #7 is the sweet spot

**Just an illustration of what it will look like  
when we achieve our core goals**

# Client Focus

**A client should never need to go outside the alliance**

- Total global coverage
- One-stop-shop
- Rapid connectivity

# Member Focus

**We want you to get the most possible value from BOKS**

- Building Relationships
- Sharing Ideas
- Supporting Talent
- Facilitating Growth

# How are we doing?

# New Members in 2025



**13**

NEW MEMBERS



**20**

NEW OFFICES



**7**

NEW COUNTRIES



**477**

NEW EMPLOYEES



**\$37m**

COMBINED REVENUE

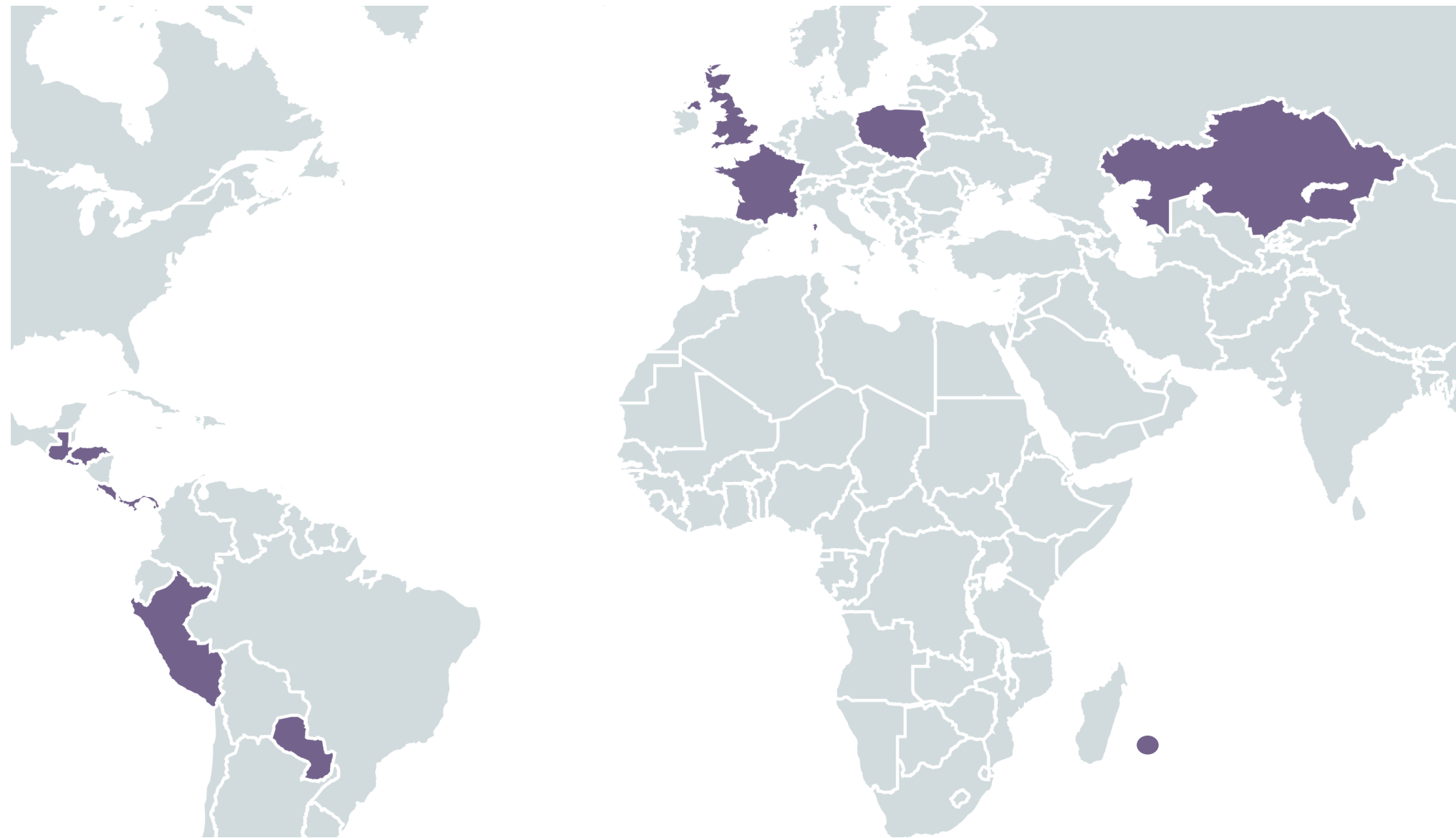


**18**

NEW PARTNERS

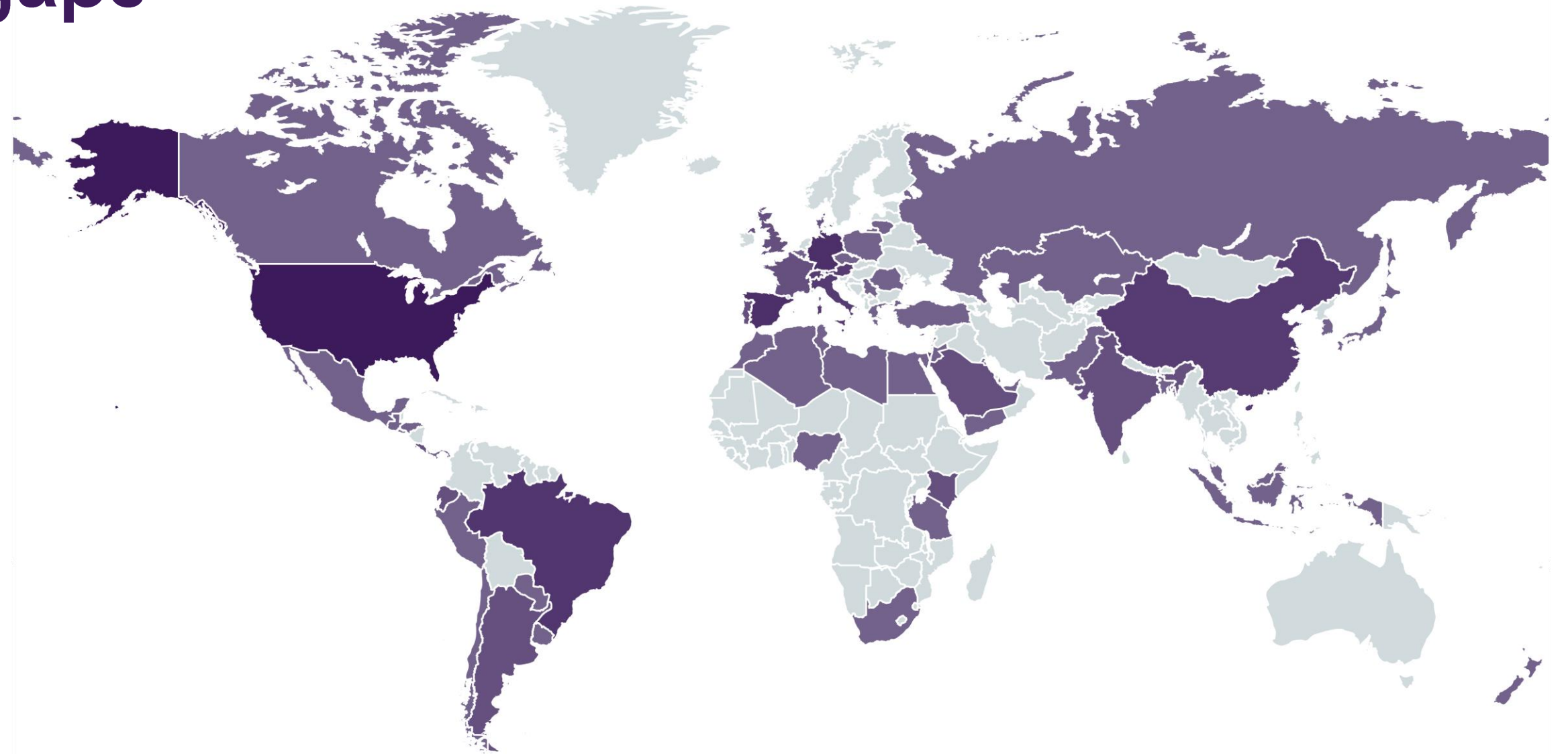
**That's about 50% on last year but,  
we've turned away more firms than ever.**

## New members are filling gaps

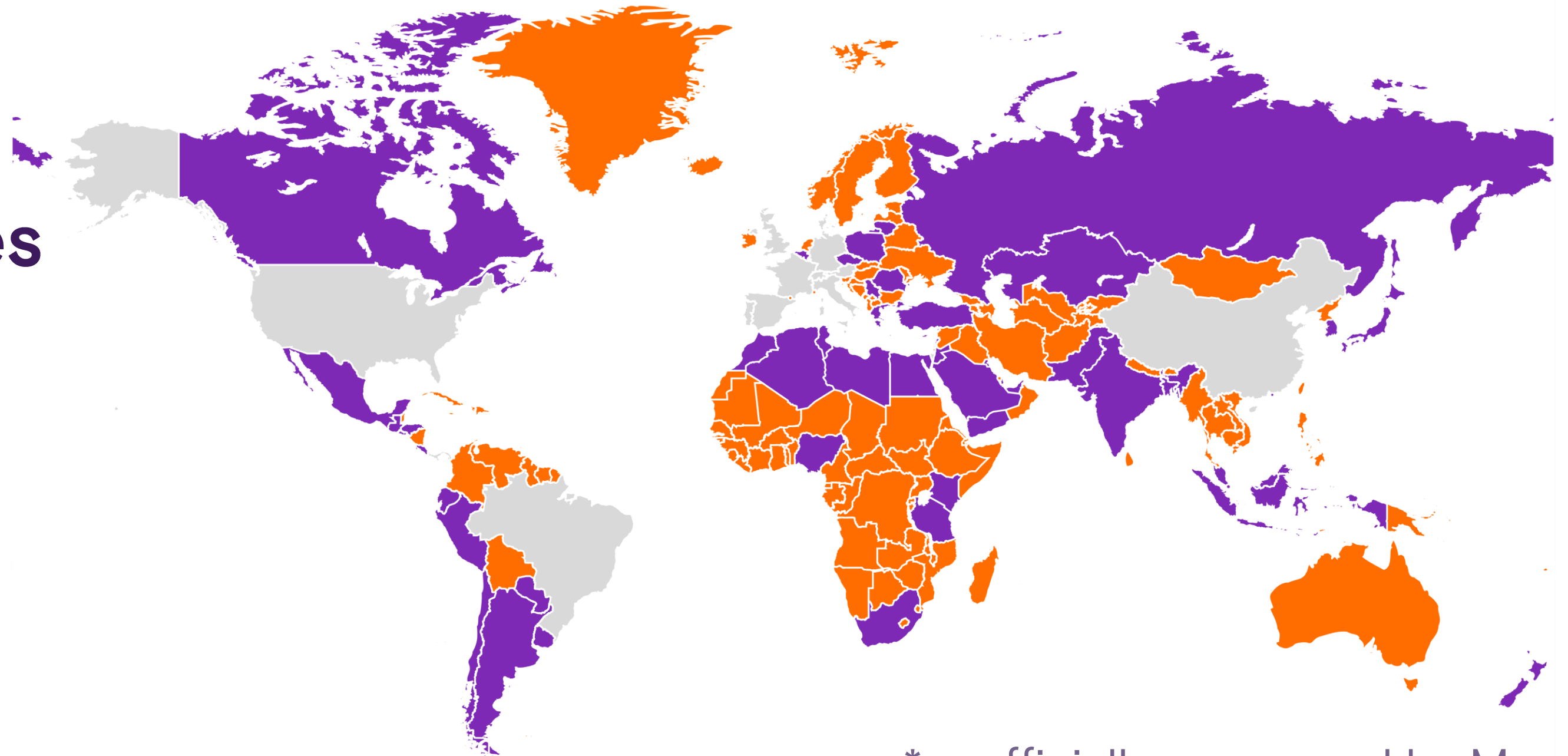


Country	Gap
Costa Rica	Location
El Salvador	Location
France	Services
Guatemala	Resource
Honduras	Location
Kazakhstan	Location
Mauritius	Resource
Panama	Resource
Paraguay	Location
Peru	Location
Poland	Location
UAE	Services
United Kingdom	Services

**We have members in most countries (72)  
but there are still gaps**



# Gaps Vacancies Opportunities



- No Members ■
- 1 sector covered ■
- All sectors covered ■

\*unofficially sponsored by MapChart

# Current Ranking: #12



**121**

MEMBERS  
WORLDWIDE



**303**

OFFICES  
WORLDWIDE



**72**

COUNTRIES  
REPRESENTED



**6.4k**

EMPLOYEES  
WORLDWIDE



**\$611m**

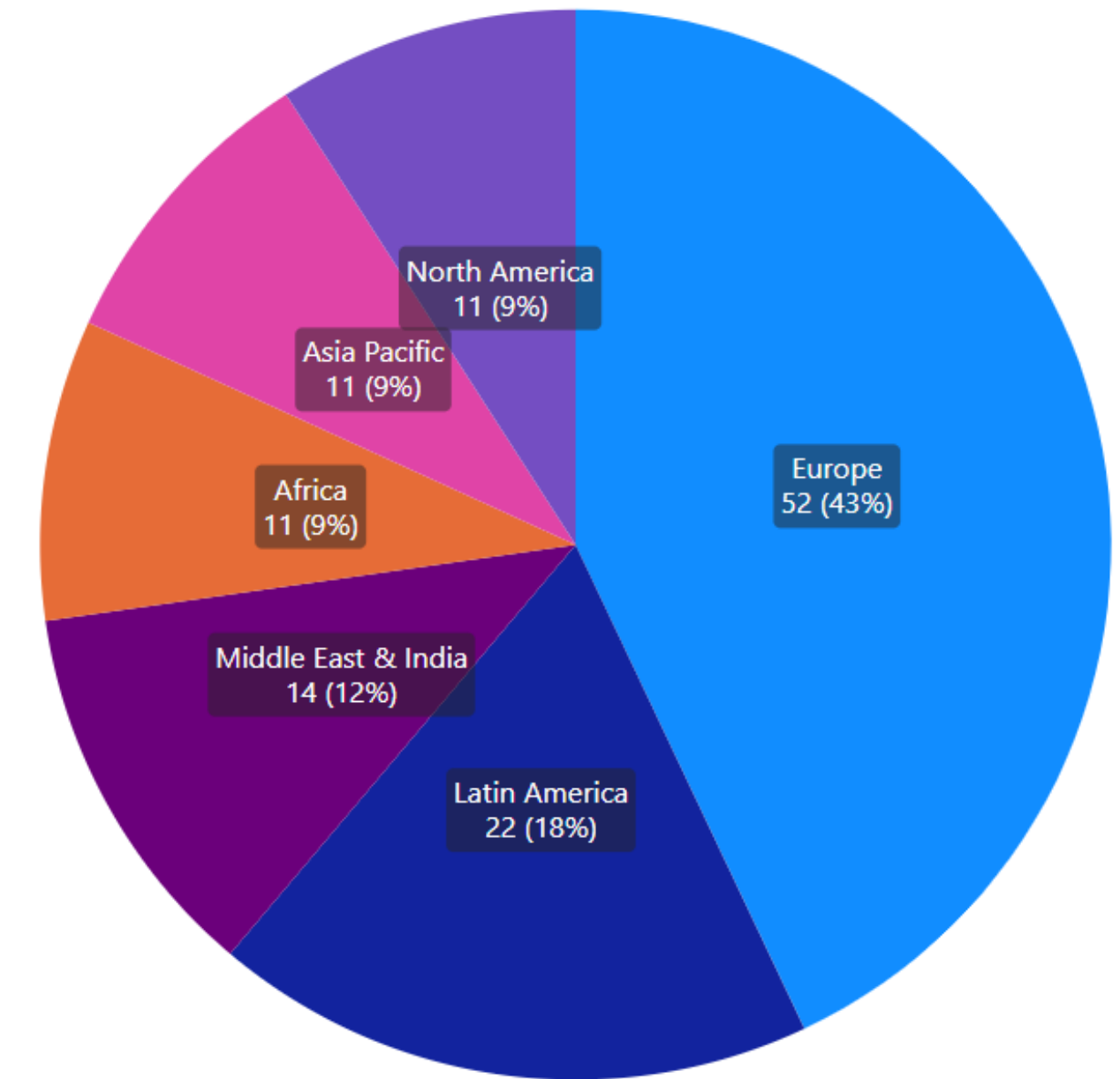
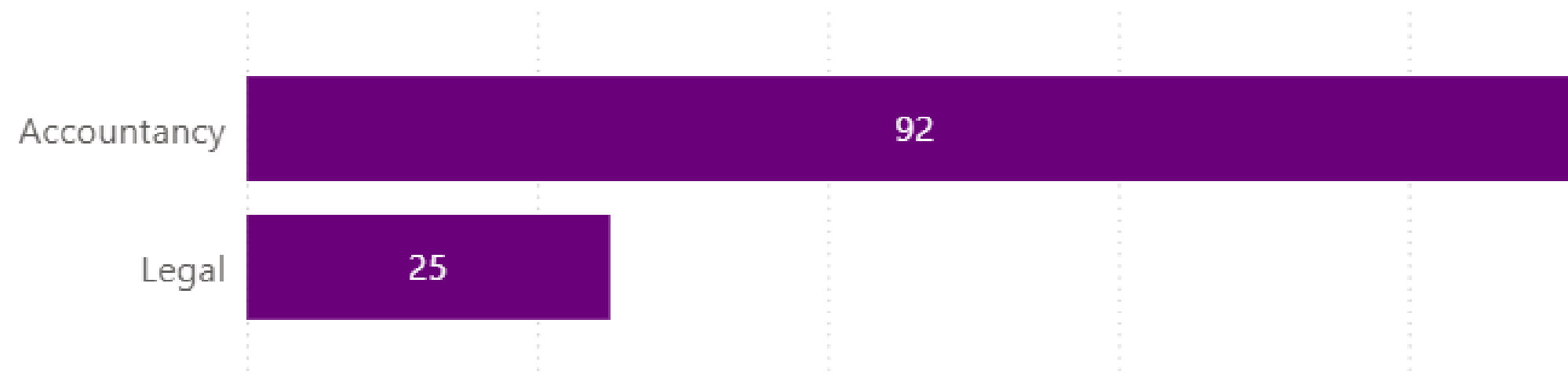
ANNUAL FEE  
INCOME



**847**

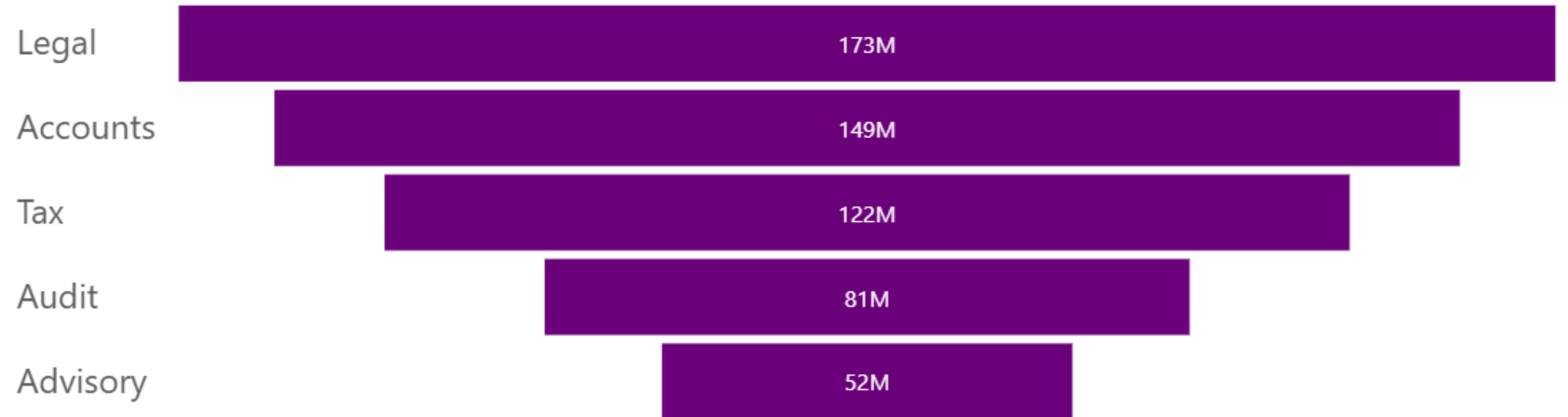
PARTNERS  
WORLDWIDE

# Drill Down



# Spotlight on LATAM

- Fastest growing region this year
- 7 new members in 2025
- Ibero-America Regional Meeting
- Regional Marketing Advisor
- Great model for other regions



## Fee Split

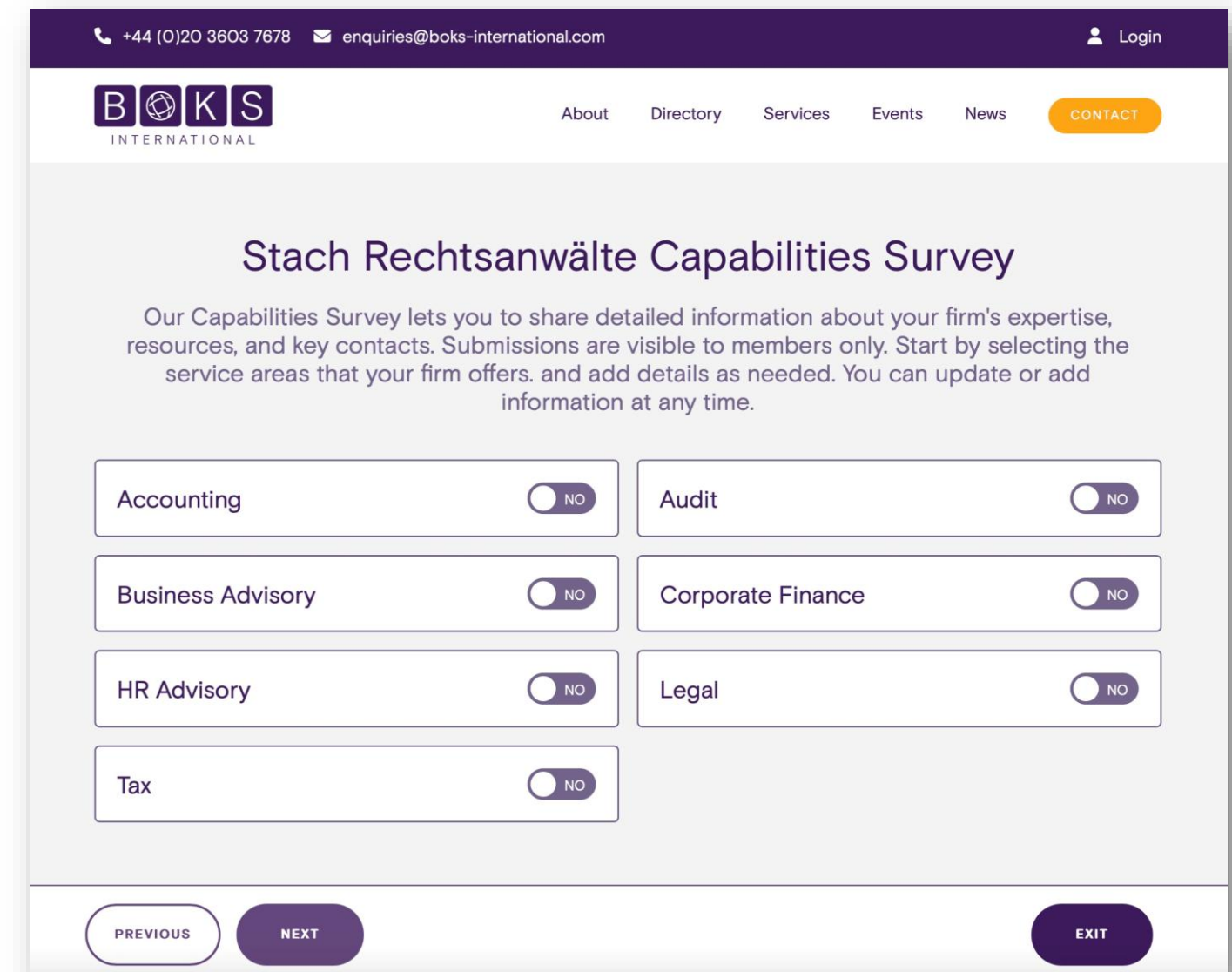
Gives us a steer on key areas  
But we need more data

# Capabilities Survey

Our new capability tracking system is now live:

- Helps us place work
- Helps you place work
- Helps us identify gaps
- Helps specialist connect

Requires your action – only as good as the data you input.



The screenshot shows a web form titled "Stach Rechtsanwälte Capabilities Survey". The form includes a header with contact information and a navigation menu. The main content area contains a description of the survey and a grid of service areas with toggle switches. The service areas are: Accounting, Audit, Business Advisory, Corporate Finance, HR Advisory, Legal, and Tax. All toggle switches are currently set to "NO". At the bottom of the form, there are buttons for "PREVIOUS", "NEXT", and "EXIT".

# Scope / Core Functionality

- Collect data regarding member service areas
- Allow members to self report and modify entries
- Output data on firm profiles for other members
- Allow users to search based on service and country



Business	<input type="checkbox"/> NO
Indirect	<input type="checkbox"/> NO
International	<input type="checkbox"/> NO
Personal	<input checked="" type="checkbox"/> YES
Number of Clients	
Number of International Clients	
<input type="text" value="No. of Clients?"/>	<input type="text" value="No. of International Clients?"/>
Please rate your range of capability (1 - 5) <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input checked="" type="radio"/> 5	
Do you have someone responsible for this area of expertise? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
Asset Protection	<input type="checkbox"/> NO
Cost Segregation	<input type="checkbox"/> NO
Domestic & Residence Advice	<input type="checkbox"/> NO

## Services

We offer a comprehensive range of professional services in a convenient one-stop shop. With specialist experts around the world, you can be confident that you will receive the highest standard of advice.

### Accounting

### Audit



**MARK LOMME**  
Director  
✉ m.lomme@boladviseurs.nl

**TOTAL CLIENTS** 150    **INTL. CLIENTS** 10

### ASSURANCE

### AUDIT ADVISORY SERVICES

### FINANCIAL STATEMENT AUDIT

**TOTAL CLIENTS** -    **INTL. CLIENTS** -

GROUP AUDIT

PRIVATE COMPANY AUDITS

## Services

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### Accounting

**TOTAL CLIENTS** -    **INTL. CLIENTS** -

### Business Advisory



**GREGORIO MORENO**  
Managing Director Glezco Capital Partners  
✉ gmoreno@glezco.com

**TOTAL CLIENTS** 100    **INTL. CLIENTS** 20

### CORPORATE SERVICES



**GREGORIO MORENO**  
Managing Director Glezco Capital Partners  
✉ gmoreno@glezco.com

**TOTAL CLIENTS** 100    **INTL. CLIENTS** 10

### Services

We offer a comprehensive range of professional services in a convenient one-stop shop. With specialist experts around the world, you can be confident that you will receive the highest standard of advice.

Accounting

 **JOHN LIU**  
Founding Partner  
✉ johnliu@atl-chn.net

**TOTAL CLIENTS 100**   **INTL. CLIENTS 100**

Audit

 **JOHN LIU**  
Founding Partner  
✉ johnliu@atl-chn.net

**TOTAL CLIENTS 40**   **INTL. CLIENTS 40**

Business Advisory

 **JOHN LIU**  
Founding Partner  
✉ johnliu@atl-chn.net

**TOTAL CLIENTS 10**   **INTL. CLIENTS 10**

### Services

We offer a comprehensive range of professional services in a convenient one-stop shop. With specialist experts around the world, you can be confident that you will receive the highest standard of advice.

Accounting

Business Advisory

Corporate Finance

**TOTAL CLIENTS 5**   **INTL. CLIENTS 2**


HR Advisory

Tax

**TOTAL CLIENTS 230**   **INTL. CLIENTS 50**

BUSINESS

INDIRECT

+44 (0)20 3603 7678    enquiries@boks-international.com     Login

**BOKS**  
INTERNATIONAL    About    Directory    Services    Events    News    **CONTACT**

Select Service    Select Category    Select Capability    **APPLY FILTER**    **RESET FILTER**

## Welcome to the Capabilities Directory

This directory is a powerful search tool designed to help members quickly find firms offering professional services. To get started, use the dropdown filters above to view results that match your specific criteria.

Alternatively, reach out for personalised support or explore our comprehensive country directory.

**CONTACT US**    **COUNTRY DIRECTORY**

Tax Select Category Select Capability **APPLY FILTER** **RESET FILTER**

### Viewing Results for Tax


Filter by Country

#### ATL China Alliance

China

TOTAL CLIENTS	INTL. CLIENTS	EXPERT AVAILIABLE
30	30	<input checked="" type="checkbox"/>

Showing Stats for Tax

 **JOHN LIU**  
Founding Partner  
johnliu@atl-chn.net

#### Glezco Asesores y Consultores

Spain

TOTAL CLIENTS	INTL. CLIENTS	EXPERT AVAILIABLE
100	20	-

Showing Stats for Tax

Tax Indirect Select Capability APPLY FILTER RESET FILTER

### Viewing Results for Indirect


Filter by Country

#### Stach Rechtsanwälte

Switzerland

TOTAL CLIENTS	INTL. CLIENTS	EXPERT AVAILIABLE
20	10	✓

Showing Stats for Indirect

 **MICHAEL KUMMER**  
Tax Partner  
kummer@stach.ch

#### Dufour Treuhand

Switzerland

TOTAL CLIENTS	INTL. CLIENTS	EXPERT AVAILIABLE
80	20	✗

Showing Stats for Indirect


Tax Indirect Consumption Tax Advisory **APPLY FILTER** **RESET FILTER**

## Viewing Results for Consumption Tax Advisory



Filter by Country

### Dufour Treuhand

Switzerland

TOTAL CLIENTS	INTL. CLIENTS	EXPERT AVAILIABLE
80	20	

Showing Stats for Consumption Tax Advisory

[VIEW FIRM PROFILE](#)  

# Expect an email with a link

# M&A Opportunities

- Fire protection and security systems buyer in Europe and the US.
- Renewable energy sector buyer in Latin America
- Universities buyer in Latin America
- US backed acquirer looking to buy hotels in Europe.  
Contact Irena Kolárová – Eppinger & Kolárová
  - Missed opportunity



## M&A Opportunities

[View Group](#)

# M&A Opportunities

## Freedom - Germany

### Energy Sector

A Company that is providing charging infrastructure for mid-sized and large parking lots And underground car parks. Includes an intelligent charging software For Load management and planned charging of EV's



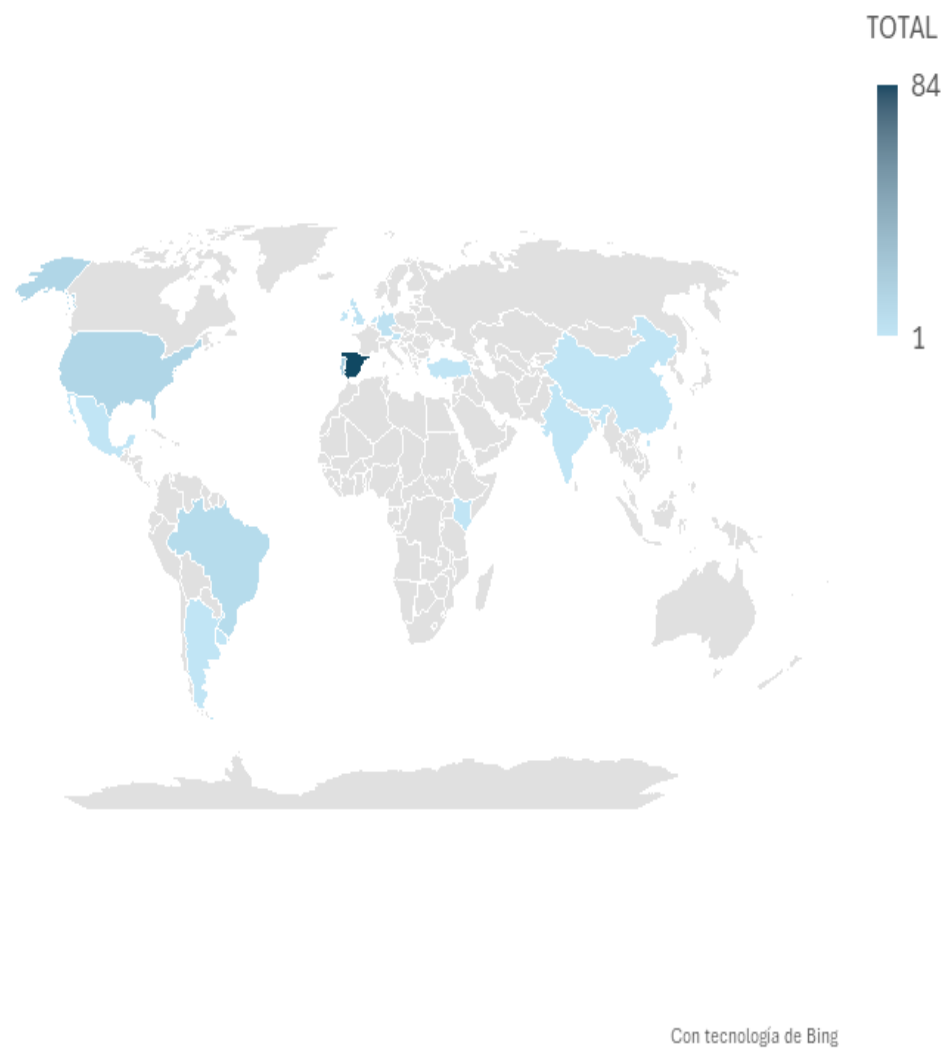
## M&A Opportunities

[View Group](#)

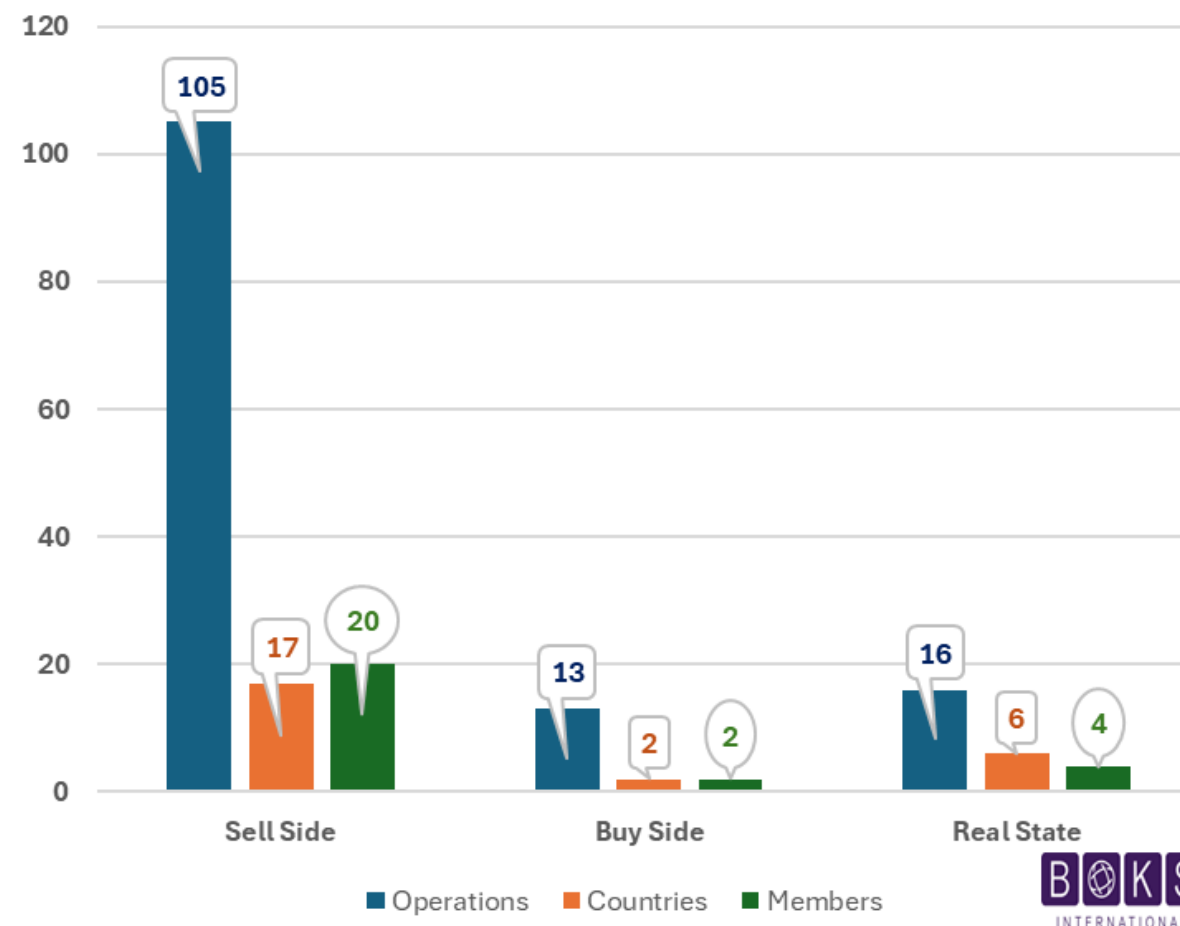
# M&A Opportunities

	Operations	Countries	Members
Sell Side	105	17	20
Buy Side	13	2	2
Real State	16	6	4

Total Opportunities by country



Operations summary



	TOTAL	Sell Side	Real State	Buy Side
1 España	84	71	1	12
2 Portugal	13	2	11	
3 USA	9	7	1	1
4 Brasil	6	6		
5 Israel	5	5		
6 Alemania	3	2	1	
7 UK	2	2		
8 Austria	2	1	1	
9 Uruguay	1	1		
10 Turquía	1		1	
11 Rep Checa	1	1		
12 Nederland	1	1		
13 Mexico	1	1		
14 Kenia	1	1		
15 Irlanda	1	1		
16 India	1	1		
17 China	1	1		
18 Argentina	1	1		
<b>TOTAL</b>	<b>134</b>	<b>105</b>	<b>16</b>	<b>13</b>

# Iberian IP & Brokerage



**GLEZCO<sup>®</sup>**  
**IBERIANIP**  
Intellectual property

**PROPIEDAD INDUSTRIAL  
E INTELLECTUAL**

Protegemos tus ideas,  
aseguramos tu futuro

 918 26 63 44    942 22 68 68    [info@glezco.com](mailto:info@glezco.com)

# Opportunities for Talent

# Staff Mobility

- 2 Internships
  - Spain to Ireland
  - Ecuador to Spain
- 4 online meetings
- 7 Offers
- 1 Online Hub



Remote Working

Bucharest, Romania  
Meet your host: A4 Services Limited



Secondments

Auckland, New Zealand  
Meet your host: Gilligan Sheppard



Remote Working

St. Gallen, Switzerland  
Meet your host: Stach Rechtsanwälte



Remote Working

Madrid, Spain  
Meet your host: VIA Consultores



Remote Working

Barcelona, Spain  
Meet your host: XTERNA Accounting, Tax and Payroll



Ready to Become a Host?  
Create a Global Connection



Remote Working

Paris, France  
Meet your host: FIDAG SARL



Remote Working

Basel, Switzerland  
Meet your host: Dufour Treuhand

**Cultural Exchange 2025**

# This Could Be You!

**Host:** Glezco  
**Location:** Santander, Spain  
**Date:** 8<sup>th</sup> September  
**Duration:** 2 Weeks  
**Attendance:** 7 People



# Who will be our next host?

New York 2025

# Member Recognition



INTERNATIONAL

# Despacho Manuel Durán Silva Samano, S.C.

Mexico

José Luis Sámano

05/10/2017

 [boks-international.com](http://boks-international.com)



# Tambunan & Nasafi (Certified Public Accountants)

Indonesia

Rizal Tambunan

04/08/2020

 [boks-international.com](https://boks-international.com)



INTERNATIONAL

# BC&MC Law and International Business Consulting Ltda

Chile

Francisco Escandon

16/09/2020

 [boks-international.com](https://boks-international.com)



# Business Alliance Ltd

Mauritius

Neellen Karuppanan

01/11/2019

 [boks-international.com](https://www.boks-international.com)



# Consultora Suizo-Uruguay

Uruguay

José Sedes

01/05/2019

# New York 2025

# Break

New York 2025

# Round Table Networking

# New York 2025

# Break

New York 2025

# Round Table Networking

# New York 2025

# Lunch by Region

# New York 2025

# Future Events

In this session, we will look at the itinerary for in-person events during 2026 and decide the location for the Annual Global Conference in 2027.



Munich 2026

# EMEA Regional Meeting

We extend a warm invitation for you to join us at our 2025 EMEA Regional Meeting in Munich, scheduled to take place at Hotel Vier Jahreszeiten Kempinski on **9-10 April 2026**.



Rio de Janeiro 2026

# Ibero-America Regional Meeting

We extend a warm invitation for you to join us at our 2025 Ibero-America Regional Meeting in Rio de Janeiro, scheduled to take place on **4-7 March 2026**.

Tokyo 2026

# Annual Global Conference

We extend a warm invitation for you to join us at our next Annual Global Conference in Tokyo, intended to take place **12-15 November 2026**.





## 2027 Shortlist

# Annual Global Conference

We would like to invite you to participate in our live poll. Open your app and navigate to the BOKS Update session. Here you will have an option to vote for the next location



## 2027 Shortlist

# Annual Global Conference

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# 2027 Shortlist Indonesia



**VOTE JAKARTA  
FOR**



**2027 Annual Conference**

**Jakarta 2027 -  
Where Energy, Opportunity, and Hospitality  
Meet the World**



# Welcome to Beating Heart of of Southeast Asia – where energy, opportunity, and hospitality meet



Welcome to Jakarta



## Three Reasons You'll Fall in Love with Jakarta:

- 1. Energy & Connectivity** - Global hub, direct flights, vibrant business energy;
- 2. Hospitality & Culture** – “Tamuh adalah raja” – guests are kings; genuine warmth everywhere.
- 3. Value & Experience** – World-class comfort at great value; extend your stay for Bali, Yogyakarta or even Lombok!



More than a destination – it's a feeling.  
See You in Jakarta 2027!



**TAMBUNAN & NASAFI**  
Certified Public Accountant

thank you

tusind tak  
謝謝 dakujem vám  
ngiyabongga  
dziękuję  
merc  
baie dankie  
धन्यवाद molte grazie

suksema  
danke  
gracias  
obrigada  
obrigado  
teşekkür ederim  
tack så mycket

takk  
gràcies  
tānan  
dank u  
mahalo



# 2027 Shortlist

# Mexico



**BOKS**  
INTERNATIONAL

**MEXICO**  
**fi0fi7**





**CANCUN**

is the perfect destination to host an international congress due to its various qualities and advantages.

These are some reasons why Cancun is an excellent option:



## HOTEL AND EVENT INFRASTRUCTURE

It has more than 200 hotels and a wide variety of event venues.

## SAFETY

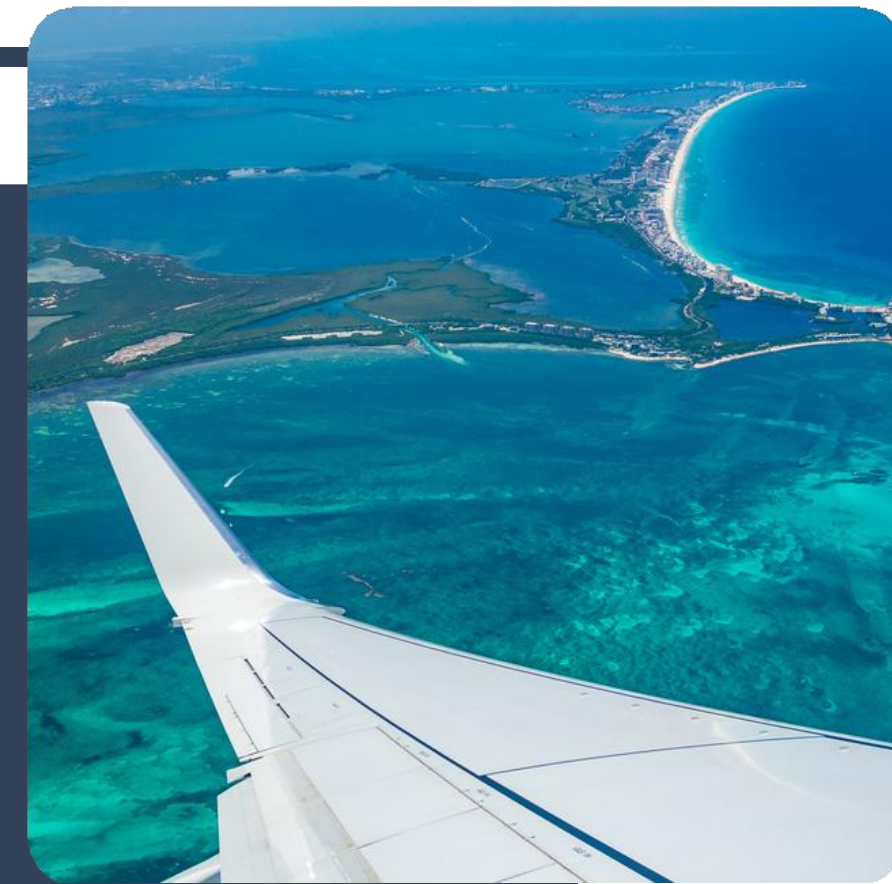
It is considered a safe destination, which is essential to ensure the peace of mind and well-being of visitors.

## AIR CONNECTIVITY

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Cancun International Airport receives direct flights from all over the world, making it easy to reach from any destination.

The city benefits from well-connected highways, providing convenient access to nearby locations.



## NO LANGUAGE BARRIERS

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English is widely spoken by most tourism professionals, ensuring smooth communication with international visitors.

## UNIQUE ENTERTAINMENT EXPERIENCES

---

Cancún offers a wide range of entertainment options catering to diverse interests, including:



### XCARET

Swim in underground rivers, enjoy nature in the aquarium and aviary, explore the Mayan culture, and watch shows like “México espectacular”.



### XEL-HÁ

Features a variety of water and adventure experiences such as snorkeling, swimming in its inlet and river, zip lines, and a giant slide at the lighthouse viewpoint.

Additionally, the park provides opportunities for hiking, cycling, and relaxing in hammocks.



### CIRQUE SU SOLEIL

A journey through Heritage and traditions.



## LUXURY SHOPPING CENTER

---

La Isla is an ideal destination for shopping and entertainment, with luxury boutiques, international cuisine, outdoor areas with water canals, and attractions for the whole family.





# 2027 Shortlist

# Morocco

# Welcome to Morocco – Where Tradition Meets Innovation





# 2027 Shortlist

# Turkey



# 2027 Shortlist

# Turkey

# B O O K S

I N T E R N A T I O N A L





# 2027 Shortlist

# Vote Now

# New York 2025

# Panel Session

The New York Playbook: Avoiding Pitfalls, Closing Deals,  
and Navigating New Risk

*Speak to the team for more details.*

# New York 2025

# Break

## New York 2025

# Breakout Sessions

CLE Centre  
*Transforming Firm Profitability  
with  
Workforce Analytics*

Lindsay Gall,  
*Makosi*

Stimson Room  
*Future Leaders*

Gary Vickrey,  
*Vickrey Leadership  
Solutions*

## New York 2025

# Evening Outline

15:45 Thinking Outside the BOKS

17:15 Close

19:00 Offsite Dinner at Michaels

*Speak to the team for more details.*

New York 2025

# Closing Comments



2027 Shortlist

And the winner is...

New York 2025

# Thinking Outside the BOKS



See you at dinner!

Michael's: 19:00

Don't be late!

 [boks-international.com](https://boks-international.com)