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What inspired you to pursue a career in Transaction Advisory Services (TAS)?

My path to TAS wasn't a straight line. I started in an industry accounting role before joining GBQ's assurance practice, which gave me a strong foundation and exposure to a wide range of clients. What ultimately drew me to TAS was the opportunity to go deeper on the analytical side of the work, the kind of detailed trend and monthly performance analysis that really tells the story behind a business. That depth of analysis, combined with the pace and variety of deal work, made TAS the right fit for me.

What do you enjoy most about working with clients?

Two things really stand out. The first is getting to work directly with founders and owners of small businesses. There's a level of passion they bring to what they've built that makes the work genuinely meaningful. The second is getting a true look under the hood of a business and understanding, on a deep level, how it really operates and what drives its performance. That combination, the people and the thorough analysis is what makes this work so rewarding.



How do you stay current with applicable laws and regulations?

A mix of sources. Our group has relied heavily on Corporate Finance Institute, Wall Street Prep, and PE Primer for ongoing CPE and technical development. I supplement that with industry publications and firm-led trainings. Staying current is a continuous effort, and having multiple inputs helps ensure I'm not missing anything that could impact a client.



What's one thing your clients (or co-workers) might be surprised to learn about you?

Outside of work, I'm a distance runner — I've completed multiple marathons and ultramarathons. Endurance running has taught me to stay composed when the miles get long and the conditions get tough, which translates well to the deal environment. Transactions rarely go exactly to plan, and a level head over the long haul makes all the difference in getting to the finish line.



What's the best piece of advice you like to share with your clients?

Know your business inside and out before going to market, keep your financial books clean, and surround yourself with the right advisors. A clean set of books is vital to making the go-to-market process seamless and efficient — buyers will ask hard questions, and the best prepared clients, with clean financials, a clear story, and a strong advisory team, consistently achieve the best outcomes.



What's a recent client success story you're especially proud of?

One engagement I'm especially proud of was one that had a tight timeline and a client who needed to move quickly to stay competitive in a process. We mobilized fast, worked closely with their team and other advisors, and delivered a thorough analysis without sacrificing quality. The deal closed on schedule, and the client specifically called out the responsiveness and collaboration as a difference-maker, which to me is just as meaningful as the result itself.

