ANNOUNCEMENTS | 05.05.2026

Choate Represents NexPhase Capital in Sale of Surgent Accounting & Financial Education to UWorld

Choate represented NexPhase Capital Partners in the sale of Surgent Accounting & Financial Education, a division of Knowfully Learning Group, to UWorld, a global leader in comprehensive academic and professional education. The deal bolsters UWorld Accounting and UWorld Finance's current Certified Public Accountant (CPA), Certified Management Accountant (CMA®), and Chartered Financial Analyst (CFA®) exam review courses with the addition of Surgent's extensive library of continuing professional education (CPE) courses, exam reviews and learning platforms for the Enrolled Agent (EA), Certified Internal Auditor (CIA) and Certified Information Systems Auditor (CISA) certifications and Income Tax School with IRS-approved courses for tax specialists of all levels.

UWorld will continue to operate Surgent's products and services as usual, and approximately 60 employees will join UWorld's roster of more than 800 across the United States and India.

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