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GeffenMesher



Daniel M. O'Leary, CPA
Shareholder

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PROFESSIONAL ORGANIZATIONS

American Institute of Certified Public Accountants
Oregon Society of Certified Public Accountants
Portland Tax Forum, Board Member
University of Portland Deans Board of Advisors, Member,
Robert Pamplin School of Business Administration
DFK International USA, Past Tax Committee Chair
Oregon Entrepreneurs Forum, Venture Oregon Steering
Committee, Past Member

EDUCATION

Bachelor of Business Administration, Accounting and
Marketing, University of Portland, 1988, cum laude
Certified Public Accountant, Oregon

COMMUNITY INVOLVEMENT

CODA, Inc., Board Treasurer
Oregon Community Foundation Professional Advisory
Council, Member
Sunset Apollo Softball Club, Board Treasurer
Young Entrepreneurs Business Week, Board Treasurer
American Lung Association of Oregon, Past Board
Treasurer

KEY TO SUCCESS

“Take the long-term perspective.”

INDUSTRY EXPERTISE

Manufacturing, Distribution & Technology
Professional Services
Real Estate

SPECIALIZATIONS

S and C corporation taxation
FASB ASC 740 (formerly FAS 109) and public company tax assistance
Multi-state and multi-national tax compliance
Income tax planning for high net worth individuals
Representing taxpayers under examination by tax authorities

BACKGROUND

In the spring of 2004, Dan found himself at a career crossroads. After 16 years with Big 4 firms, he knew he needed a change, yet the timing wasn't yet right. “A lot of my clients had been with me through everything that happened at Arthur Andersen, and I knew I needed to stick around for them rather than change locations.” From what he learned about Geffen Mesher, he knew it was exactly what he wanted his next firm to be: a place where major decisions happen in-house with group buy-in; a firm that works from their strengths, and doesn't try to sell clients on the “projects or products of the month”; where younger staff members are mentored and supported as they discover their niches; and where loyalty matters. In October of that year, he finally brought his experiences, warmth and sense of humor to the firm. To no one's surprise, a number of his clients came with him during the move.

“What you discover after working with clients for 20 years and more is that little things matter most. The simple act of returning phone calls, especially when business is busy, speaks volumes. People know you're listening, and that you have their best interests at heart.” A proud parent of two grown daughters, you might catch Dan tailgating outside of Reser Stadium during the fall. He'll be the guy smiling behind a Guinness.