



DANIEL M. O'CONNELL II

CPA/PFS, CVA

MANAGING PARTNER

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☎ 410-546-5600

Originally from Hagerstown, MD, Dan joined PKS in 1995 and became a Partner in 2005. He is extremely active in the community, lending his expertise to several organizations throughout the area. A highly organized individual, Dan enjoys helping his clients reach their financial goals.

Dan lives in Bishopville with his wife Stacy and their two children, Cassidy and Grady. Outside of work Dan enjoys spending time with his family, boating, fishing and anything to do with vintage automobiles.

AREAS OF PRACTICE

- › Closely-held business valuations for estate, gift, purchase, sale, merger & acquisition, and other purposes
- › Litigation support and consulting for attorneys in matters of shareholder disputes, buy-sell agreements, divorce and other matters
- › Qualified expert witness
- › Economic, Financial, Operational, and Management consulting to small and medium sized businesses
- › Medical Practice Consulting
- › Income Tax, Retirement & Financial Planning for owners of small to medium sized businesses, high net worth individuals and Health Care Providers

PAST & PRESENT COMMUNITY SERVICE

- › The Community Foundation of the Eastern Shore – Board Member
- › Salisbury Wicomico Arts Council – Board Member, Treasurer
- › Salisbury Area Chamber of Commerce – Member, Board Member
- › Lewes Chamber of Commerce – Member
- › Salisbury Rotary Club – Treasurer
- › Lecturer on small business formation for Salisbury University and Wor-Wic Community College
- › Shore Bank Advisory Board – Member
- › Oak Ridge Baptist Church – Advisor
- › The Child and Family Foundation, Inc. – Board Member, Treasurer
- › Ocean City Chamber of Commerce – Member
- › Junior Achievement – Volunteer

EDUCATION

- › B.S. in Accounting
- › Salisbury University, Salisbury, MD

CERTIFICATIONS

- › Certified Public Accountant
- › Personal Financial Specialist
- › Certified Valuation Analyst
- › Registered Investment Advisor

PROFESSIONAL AFFILIATIONS

- › Salisbury Health Group LLC – Executive Director
- › American Institute of Certified Public Accountants
- › Maryland Association of Certified Public Accountants
- › Delaware Society of Certified Public Accountants
- › National Association of Certified Valuation Analysts
- › Institute of Business Appraisers
- › Financial Planning Association
- › Medical Group Managers Association
- › Allinial North American Network – Healthcare Committee Co-Chair