



DANIEL M. O'CONNELL

CPA/PFS, CVA

MANAGING PARTNER, INVESTMENT ADVISOR

✉ doconnell@pkscpa.com

☎ 410-546-5600

In addition to being a Certified Public Accountant, a Personal Financial Specialist, and a Certified Valuation Analyst – Dan is the firm's Managing Partner and Chief Compliance Officer. He has more than 25 years of experience in accounting, taxation and financial planning. A highly organized individual, Dan enjoys helping his clients reach their financial goals.

Dan is extremely active in the community, lending his expertise to several organizations throughout the area. He lives in Bishopville with his wife Stacy and they have 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

- Accounting
- Business Succession Planning
- Cash Flow Projections
- Comprehensive Financial Planning
- Customized Investment Planning Strategies
- Divorce Planning
- Executive Benefits/Compensation
- Higher Education Planning
- Inheritance & Estate Planning
- Mergers & Acquisitions
- Retirement Income Planning
- Small Business Planning
- Social Security Planning
- Tax Planning
- Wealth & Risk Management for Institutions and High Net Worth Individuals

PAST & PRESENT COMMUNITY SERVICE

- Community Foundation of the Eastern Shore – Board Member
- The Child and Family Foundation, Inc. – Board Member, Treasurer
- 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 Salisbury University and Wor-Wic Community College
- Shore Bank Advisory Board – Member
- Oak Ridge Baptist Church – Advisor
- Ocean City Chamber of Commerce – Member
- Junior Achievement – Volunteer

EDUCATION

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

CERTIFICATIONS

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

PROFESSIONAL AFFILIATIONS

- 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