

James R. Hanna

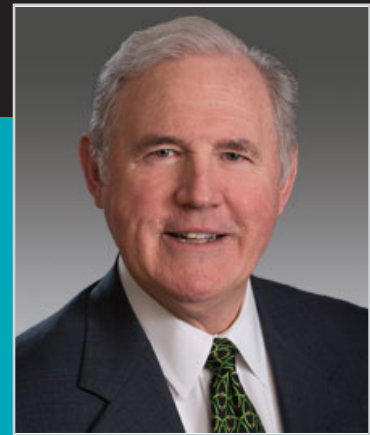
FAMILY WEALTH SERVICES

James Hanna is a senior advisor in Marcum's Philadelphia office and an active member in the Marcum Family Office, High Net Worth Individuals, and Trust and Estates Practice groups. He came to Marcum in 2015 via the Firm's merger with Smart Devine, a leading full-service accounting firm in Philadelphia.

Mr. Hanna provides tax guidance and long-term strategic planning solutions for high net worth individuals, their families, and their closely held businesses, and provides direction in the realm of trust and estate planning. He has more than 40 years of experience providing a wide range of individual and corporate tax planning services extending to related wealth management services, estate planning considerations, succession planning exigencies, and long-term multi-generational wealth transfer strategies. His business experience spans a vast range of engagements to include business valuations and forensic investigations. As an advisor, Mr. Hanna provides acumen at every stage of a client's wealth base.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Dad Vail Regatta – president, Organizing Committee
National Association of Certified Valuation Analysts (NACVA)
Pennsylvania Institute of Certified Public Accountants (PICPA)



James R. Hanna, CPA*, CVA
Senior Advisor

AREAS OF EXPERTISE

Deal Flow
Debt Servicing/Management
Financial/Managerial Reporting
Financial Accounting
Financial/Operational Reporting
Fixed Assets
General Ledger
Investment Waterfalls
Multicurrency
Planning/Budgeting/Forecasting
Portfolio Analysis
Process Reengineering
Procurement/AP
Real Estate Leasing
Recoveries/Service Charges
Revenue/Billing
Valuation/Cash flow Analysis

KEY CLIENTS

Financial Services
Higher Education
Private Equity
Professional Services
Real Estate

EDUCATION

Georgetown University – BS, Accounting



MARCUMGROUP
MEMBER

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