

DANIEL J. ROACH, CPA*

PARTNER ► ASSURANCE SERVICES



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Daniel J. Roach is an Assurance Services partner in the Firm's Portland, Maine office. He has more than 25 years of experience in public accounting, operations, investment banking and venture capital. He provides auditing and assurance services to clients in the financial services, software, biotechnology and manufacturing industries. In addition he works with the Marcum Transactions Support group on due diligence and quality of earnings reports and outsourced technical accounting and tax services.

Working closely with both publicly traded and privately held companies, Mr. Roach assists clients with initial public offerings, mergers and acquisitions, drafting financial statements and SEC filings, revenue recognition and complex debt and equity issues.

A recognized industry expert, Mr. Roach has been quoted in the *Wall Street Journal*, the *Boston Globe* and the *Boston Business Journal* on technology company issues and is a frequent speaker at technology industry events. In addition to his experience as a CPA, Mr. Roach worked in venture capital and investment banking. He spent several years at technology companies where he assisted in establishing their finance functions, build out manufacturing facilities and raising capital.

Professional & Civic Affiliations

Maine Society of CPAs

Member of the Smaller Business Association of New England

Association for Corporate Growth

North Shore Technology Council

MIT Enterprise Forum of Cambridge, Former Board Member, Former
Entrepreneurship Competition Judge

EXPERTISE

- Family and Closely Held Businesses
- Raising Capital and Debt
- Preparation for a Transaction
- Public Company Reporting
- Accounting for M&A Transactions
- Complex Revenue Recognition
- Stock Based Compensation and Complex Equity

INDUSTRY FOCUS

- Manufacturing and Distribution
- SaaS and Software Licensing
- Biotechnology
- Medical Devices
- Advanced Materials
- Financial Services
- Cannabis Industry
- Initial Public Offerings
- Mergers & Acquisitions
- Financial Statements
- SEC Filings
- Budgeting & Forecasting
- Not-for-profit

EDUCATION

- Master of Business Administration
Northeastern University
- BA, University of Rochester

MARCUM
ACCOUNTANTS ▲ ADVISORS

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* Licensed in the States of Maine and Commonwealth of Massachusetts