

JAMES R. HANNA, CPA*, CVA

SENIOR ADVISOR ► FAMILY WEALTH SERVICES



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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)

PRACTICE FOCUS

- 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

INDUSTRY FOCUS

- Financial Services
- Higher Education
- Private Equity
- Professional Services
- Real Estate

EDUCATION

- Bachelor of Accounting
Georgetown University

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ACCOUNTANTS ▲ ADVISORS

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