ORBA®
Accounting | Tax | Advisory

# DAN NEWMAN, CPA, MST


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DIRECTOR

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Dan has been with ORBA since 2009. He is a member of the firm's tax group where his efforts are directed towards tax compliance and strategic planning to maximize beneficial outcomes for clients. Dan works on individuals, partnerships, closely-held corporations and trusts/estates. He is experienced working in several industries including manufacturing, real estate, law firms and other service businesses and wealth management.

## PROACTIVE

Dan finds ways to provide value to clients through education and training. By staying on top of industry standards and evolving tax law, Dan is able to provide an efficient, competent and thorough work product and provide comprehensive advice to his clients. He is always available to answer questions, review strategies and provide consultation to meet client needs.

## OUTSIDE OF THE OFFICE

Dan enjoys taking a systematic and investigative approach to most of his tasks. While this serves him well in the accountant role, it also applies to his two favorite hobbies, golf and horse racing. Dan tries to make time to get to the golf course and racetrack as often as possible to improve on his skills.

## SEMINARS & EVENTS

- *Young Professionals: How to Take Control of Your Financial Future,* Chicago, IL, June 23, 2016

## BLOGS

- *RMDs Are Back: Here Is How To Soften the Tax Blow*
- *Should You Convert Your Balance to a Roth IRA?*
- *For Good Financial Health, Take Your RMDs*
- *Paying for College: How to Avoid Costly Financial Aid Mistakes*
- *Are You at Risk for AMT Liability?*

## NEWSLETTERS

- *Wealth Management Group Newsletter – Summer 2020*
- *Wealth Management Group Newsletter – Fall 2019*
- *Wealth Management Group Newsletter – Spring 2018*
- *Wealth Management Group Newsletter – Summer 2016*

## CLIENT ALERTS

- *Refund of Educational Costs Originally Paid from a 529 Plan is a Taxable Distribution*
- *Obama Administration Launches myRA Retirement Savings Program*

### SERVICES

Tax Services
Wealth Management Services
Consulting for Businesses
Consulting for Individuals

### MEMBERSHIPS AND AFFILIATIONS

- American Institute of Certified Public Accountants
- Illinois CPA Society
- University of Maryland Alumni Association

### CERTIFICATIONS AND LICENSES

- Certified Public Accountant

### EDUCATION

- B.S., Criminology, University of Maryland
- M.S., Accountancy, DePaul University
- M.S., Taxation, DePaul University