

# Daniel J. Roach

## ASSURANCE SERVICES

Daniel J. Roach is an Assurance 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

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



**Daniel J. Roach, CPA**  
Partner

### SUBJECT MATTER 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

### PRACTICE 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  
Family and Closely Held Businesses

### EDUCATION

Master of Business Administration  
Northeastern University

Bachelor of Arts, Economics  
University of Rochester



MARCUMGROUP  
MEMBER

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ACCOUNTANTS ▲ ADVISORS