



Daniel F. O'Brien, CPA, CFP, JD, CExP, O'Brien, Riley, & Ryan, P.C.

Daniel O'Brien (Dan) is a partner and president of O'Brien, Riley, & Ryan, P.C. He has over thirty- five years of experience in all aspects of tax and financial planning for individuals, business owners, and families.

Working closely with business owners and high-net-worth individuals, Dan plays an active role in developing a comprehensive plan for his clients to meet their financial goals and objectives by assisting with the accumulation, protection, and transfer of their wealth.

Acting as an advisor with closely held businesses, Dan is experienced in planning for the transfer and continuation of businesses to their next owner, and helps individuals retain more money after taxes and secure their retirement.

When it comes to exit/succession planning, he understands the requirements and planning it takes to make this type of transition successful. Through thoughtful tax-smart planning and practical methodology, he is able to extract the business value, which for many clients may be the most important asset they own. He then counsels and directs clients on the planning, tax, and cash flow steps to consider.

He received a Bachelor of Arts in Economics from the College of the Holy Cross and a law degree from Suffolk University. Dan earned the designation of Certified Financial Planner® and is a Certified Exit Planner (CExP™).