



Daniel A. Fortman

MANAGING PARTNER | CPA

Dan is an assurance services partner who has more than 35 years of accounting and auditing experience. Dan has consulted on a broad range of business matters for clients in a number of industries, such as distribution, entertainment, manufacturing, printing, professional corporations, not-for-profit and real estate. He has managed audits of privately held corporations, partnerships, and not-for-profit entities and is responsible for clients ranging from \$5 million to \$75 million in revenues.

Dan's analytical approach to accounting and auditing has served him well in his quest to master the game of golf. He and his wife enjoy travelling together and spending time with their two grown children.

Skills/Practices

- ▶ Audits, reviews, and compilations of financial statements for closely held businesses
- ▶ Audit services for employee benefit plans, including 401k's and ESOP's
- ▶ Audit services for not for profit entities
- ▶ Planning and accounting for Employee Stock Ownership Plans (ESOP's)
- ▶ Business acquisition and sale transactions, including due diligence, tax planning, and deal structuring
- ▶ Business startups, purchases, sales, and mergers
- ▶ Corporate, partnership, and individual tax planning
- ▶ Private Foundation planning and compliance
- ▶ Estate, gift, and trust planning and compliance services
- ▶ Tax planning for high net worth individuals, including succession and wealth transfer
- ▶ Business consulting
- ▶ Controllorship services to clients seeking to outsource functions of their accounting department
- ▶ Experience working with foreign-owned businesses doing business in the United States
- ▶ Litigation support and forensic accounting services
- ▶ Family office services for high net worth multi-generational families
- ▶ Individual trustee

Contact Info

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Education

Bachelor of Science in Accounting,
University of Illinois Chicago

Memberships

Member of the American Institute of
Certified Public Accountants
Member of the Illinois CPA Society

Community Involvement

University of Illinois Chicago Accounting
Department Advisory Board