Daniel F. 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 planning for individuals, business owners, and families.

Some of the services offered to his clients include:

- Trust and Estate Tax Planning
- Tax Planning
- Estate Tax Analysis
- Cash Flow Projections
- Exit and succession planning

Professional Background

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 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.

Education & Associations

He received a Bachelor of Arts in Economics from the College of the Holy Cross and a law degree from Suffolk University.

Dan is a member of the:

- American Institute of Certified Public Accountants (AICPA),

- Massachusetts Society of Certified Public Accountants,
- Massachusetts Bar Association, and
- Institute of Certified Financial Planners.

Contact Information

Email Dan O’Brien
781-410-2300