

Daniel P. McLeod, CFA

mcleodd@mercercapital.com

PROFESSIONAL EXPERIENCE

Daniel McLeod is a senior financial analyst with Mercer Capital. He has valuation experience in engagements related to corporate planning and reorganizations, financial reporting, fairness opinions, litigation support, employee stock ownership plans, and estate and gift tax planning and compliance matters.

PROFESSIONAL DESIGNATIONS

Chartered Financial Analyst (The CFA Institute)

PROFESSIONAL MEMBERSHIPS

The CFA Institute

NEWSLETTERS

Value Matters™, Quarterly Publication, Mercer Capital

Value Focus: Medtech & Device Industry, Quarterly Publication, Mercer Capital

PUBLISHED ARTICLES

“Now Could Be a Great Time to Transfer Stock to Heirs,” *Mercer Capital’s Value Matters, Issue No. 1, 2024*

“The Importance of Quantitative Methods to Derive Marketability Discounts | *Nelson v. Commissioner*,” *Mercer Capital’s Value Matters, Issue No. 2, 2022*

“What Does the Step-Up in Basis Tax Proposal Mean for High Net Worth Individuals and Family Businesses?” *Mercer Capital’s Value Matters, Issue No. 2, 2021*

“Five Trends to Watch in the Medical Device Industry,” with Sujan Rajbhandary, *Mercer Capital’s Value Focus: MedTech & Device Industry Newsletter, October 2019*

“Industry Considerations for Step Zero: Qualitative Assessments,” with Travis W. Harms, *Mercer Capital Whitepaper, October 2018*

EMPLOYMENT

Mercer Capital Management, Inc.

Senior Financial Analyst, 2019 to present

Financial Analyst, 2016 to 2019

EDUCATION

Vanderbilt University, Nashville, Tennessee (B.A., Economics)

