

Daniel P. McLeod, CFA

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PROFESSIONAL EXPERIENCE

Daniel McLeod is a vice president 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.

As a member of Mercer Capital's Family Business Advisory Services Group, Daniel provides financial education, valuation, and other strategic financial consulting to multi-generation family businesses. The Family Business Advisory Services Group helps family shareholders, boards, and management teams align their perspectives on the financial realities, needs, and opportunities of the business. He is a regular contributor to the group's quarterly publication, *Value Matters*®.

Daniel is also a member of the Medical Device and Medical Technology industry team and contributes to the quarterly newsletter *Value Focus: Medtech & Device Industry*.

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

“Medical Device Industry Outlook – Five Long-Term Trends to Watch,” Co-author, *Value Focus: MedTech & Device Industry Newsletter*, Mercer Capital, First Quarter, 2025

“Trends in MedTech Valuation Step-Up Multiples,” *Value Focus: MedTech & Device Industry Newsletter*, Mercer Capital, Fourth Quarter, 2024

“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,” co-author, *Mercer Capital’s Value Focus: MedTech & Device Industry Newsletter*, October 2019

“Industry Considerations for Step Zero: Qualitative Assessments,” co-author, *Mercer Capital Whitepaper*, October 2018

EMPLOYMENT

Mercer Capital Management, Inc.

Vice President, 2024 to present

Senior Financial Analyst, 2019 to 2024

Financial Analyst, 2016 to 2019

EDUCATION

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

