



**Danielle McDonagh** CPA, MST  
***Principal***

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#### MEET DANIELLE

As a principal on our healthcare team, Danielle assists physicians and medical practice administrators. They regard her as a go-to person for accounting and tax questions. Danielle is passionate about cultivating strong relationships, which is evident in the way she works with each client personally. With her years of experience, Danielle has been able to hone in on her skills of:

- Analyzing financial and billing reports,
- Tax planning for entities and individuals,
- Assisting practice managers with various compliance/HR, and
- Getting to know the physician group personalities in order to become a reliable resource for their practice.

#### BACKGROUND

Danielle began her professional career with current Edelstein principal, Bob O'Connor, and partner, Tim O'Connor at their CPA practice, Baker O'Connor, LLC. The firm then merged with Edelstein & Company in 2012. As Danielle learned more about Edelstein's healthcare niche, she found the ever changing industry appealing. The skills she developed at Baker O'Connor, LLC transitioned well in assisting the healthcare department with their various needs.

As an involved member of our firm, Danielle is co-chair of both the Community Service Committee and the Women's Initiative Committee.

#### HOW DANIELLE CAN HELP

- Prepare and analyze financial statements
- Assist with Sage and Quickbooks
- Benchmarking expenses and staffing
- Prepare budgets and compensation models
- Review and analyze billing reports
- Prepare buy-in/buy-out calculations
- Year-end tax planning, preparation of tax returns, and other required filings

#### RESULTS

160 Federal Street, 9th Floor  
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- Assisted clients with implementation of cloud based platform to ease the sharing of accounting software and data
- Analyzed financials and billing reports and identified potential areas of opportunity for savings and revenue generating ideas.
- Main point of contact for implementation of retirement plan within an organization shifting from pooled account to individual accounts. This change to a more user friendly platform for participants also resulted in cost savings for the practice.
- Prepared a presentation of potential compensation models to assist partner group with determining the fairest plan.

#### OUTSIDE THE OFFICE

I enjoy spending time with family and friends and staying active through running and various sports.

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#### EDUCATION

Bachelor of Science in Accountancy, Bentley University (Minor in Computer Information Systems)

Master of Science in Taxation, Bentley University, McCallum Graduate School of Business

#### PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants (AICPA)

Massachusetts Society of Certified Public Accountants (MSCPA)

MSCPA Women in Accounting Committee

Medical Group Management Association (MGMA)