



Daniel D. Morris, CPA

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Mission: “To elevate business services to the ‘WOW’”

Daniel D. Morris started his accounting career in 1984 Ernst & Young in San Jose, California. Today, he is the senior partner of Morris + D'Angelo, a Silicon Valley and Portland, Oregon based CPA firm specializing in integrating entrepreneurial advisory services and international taxation strategies. Dan also holds the position of Director of International Tax for Exemplar Consulting, LLC a Boston and New York based law firm and consultancy serving the middle market. Dan co-founded Strategic Global Advisors, a Nassau anchored consultancy serving entrepreneurially lead start-ups and high net worth families, navigate the complexities of cross-border transactions, expansion, asset protection, and wealth preservation.

As a frequent speaker at conferences, leadership development events, and seminars, and a consultant to professional service firms on implementing International Business Structuring, Global Business Strategies, Total Quality Service and Value Pricing, his work takes him around the world. He has been an instructor with the California CPA Education Foundation since 1998 and has authored, developed, and presented over two dozen courses and conferences for them on topics including ranging from international tax strategies, ethics, pricing, customer selection, and human capital development.

Dan received his Bachelor of Science from the University of Oregon and started his career at Ernst & Young in San Jose. Dan is active with the California Society of CPAs and the AICPA. Dan is a founder of the VeraSage Institute, a think tank dedicated to eradicating hourly billing practices, value pricing, and total quality service. Dan has helped establish a number of Silicon Valley start-ups including Signio that was acquired by Verisign for \$1.2 billion in 2000.

Dan is responsible for his firm's marketing efforts and specializes in global business structures and tax optimization strategies, tax litigation/audit issues, AMT tax planning for high net-worth individuals, foreign sales tax planning, and strategic management consulting for closely held businesses.

Addendum to Bio for Daniel D Morris

Dan is regularly sought out by entrepreneurs, investors, lawyers, bankers, , and the media to discuss and evaluate opportunities from low tech to high tech. Several companies have invited Dan to be part of their formal and/or advisory board.

Specific recent examples include:

- Silicon Valley Anchored Start-Ups:
 - LED lighting importer
 - Energy conservation tool manufacturer
 - Innovative software company relating to decision making processes
 - Multinational display company
 - Internet based health care offerings
 - SEO Services
- National/International Start-Ups
 - Internet based auction house
 - Patent litigation services company
 - Pharmaceutical importer
 - Global experiential travel group
 - Green energy/bio-char multi-national enterprise
 - Global airline leasing start-up
- Other Industries
 - Catering
 - Medical
 - IP Creation

- Asset protection
- Biotech
- EDA

Media Interviews

- Mercury News
- SF Chronicle
- WSJ
- Journal of Accountancy
- CalCPA Journal
- CNN/Money
- Consumer Reports
- NPR
- Various accounting/tax publications
- KGO Radio
- KGO TV
- KPIX TV (Multiple)
- CalCPA Institute (multiple podcasts)
- Dozens of reprints of interviews via related party newswire services