

About

Daniel Rohr is the accomplished Sole-Shareholder of Rohr & Associates, having assumed leadership of the firm in 2012 from his father, David Rohr. With a wealth of experience in assisting small to medium-size businesses and their owners, Daniel specializes in designing tailored tax mitigation and retirement planning strategies to help clients achieve their financial aspirations.

As a trusted advisor, Daniel prioritizes comprehending his clients' complete financial landscape. He excels at simplifying intricate tax concepts, collaborating with clients' other advisors to form a cohesive team dedicated to optimizing their financial affairs for the most favorable tax outcomes.

Native to the Central Coast, Daniel grew up in the Five Cities community. During his time at Arroyo Grande High School, he showcased his exceptional skills as an All-State Football player and emerged as the Shot-Put State Champion. Choosing to stay close to home, he pursued a Football Scholarship at Cal Poly San Luis Obispo, where he earned a Bachelor of Science in Business and Accounting. Committed to continuous growth, he subsequently attained a Master of Science in Taxation from Golden Gate University, renowned as the leading program for Taxation studies in the country.

When not immersed in the intricacies of finance, Daniel relishes quality time with his wife and two young children. He finds fulfillment in engaging in physical exercise and delving into books on American History.

Daniel J. Rohr,
CPA/PFS, EA, MS Tax

CERTIFICATIONS

- Certified Public Accountant
- Personal Financial Specialist
- Enrolled Agent

EDUCATION

- California Polytechnic State University
 - Bachelor of Science in Business Administration with a Concentration in Accounting
- Golden Gate University
 - Masters of Science in Taxation

AREAS OF FOCUS

- Advanced Tax Planning
- Business Planning and Consulting
- Personal Financial Planning
- Business Valuation
- Projections and Forecasts
- Strategic Planning



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