

Daniel J. DiMario, JD, MST, EA

Vice President, Tax



Dan DiMario has built a significant level of trust with clients as a result of his client-centered approach. Given his keen ability to communicate with clients and listen to their priorities beyond the tax issues at hand, Dan offers both individuals and businesses a big-picture perspective. This helps facilitate client discussions that provide him with a greater understanding of the issues and their impact on the client's business, allowing him to also provide general business advice as it relates to his tax services.

His work covers the preparation and review of business, fiduciary and individual tax returns, including returns for family offices and high-net-worth individuals. He regularly communicates with clients on changes in federal, state and local income tax laws and compliance issues, and details how these changes will impact clients' income tax liability. He represents clients before the Internal Revenue Service and successfully argued before the Illinois State Board of Elections in a penalty abatement case on behalf of one of his clients, a local politician.

Dan serves as the firm's ambassador to the Illinois CPA Society. He obtained his enrolled agent license from the U.S. Department of the Treasury in 2012. Dan earned his bachelor's degree in accountancy from Rockford College, and his master's of taxation and his law degree from Northern Illinois University.

While at Rockford College, he volunteered each tax season in the IRS-sponsored VITA program which offers free tax help to low- and moderate-income taxpayers, persons with disabilities, and the elderly who do not have the means to prepare their own tax returns. During his law studies at Northern Illinois University, Dan was elected treasurer of both the Delta Theta Phi Law Fraternity and the Justinian Society of Lawyers (student organizations). Also, during law school and shortly thereafter, he worked as the head law clerk for the Winnebago County State's Attorney's Office, where he was responsible for researching, staffing and case management.

When he is not working, Dan enjoys reading, watching sports and spending time with his wife and two young sons, including coaching both T-ball and basketball.

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