

O. H. "Harry" Daniels, Jr., CPA, CFP, PFS, CVA

Partner, Duggan, Joiner and Company, CPAs

Background &  
Experience

Joined the firm in December, 1974 upon graduation from the University of Florida with a Bachelor of Science degree with a major in accounting. Passed the CPA exam and was licensed to practice accounting in the State of Florida in 1978. Admitted as a partner in 1983. Elected as President of Duggan, Joiner and Company, CPAs in June, 2011 and continues to serve as President. Clients include a diverse group of industries including agriculture, aviation, retail, real estate, professional service organizations, medical, and not for profit organizations. Provide accounting, business planning and management, and tax preparation services including representing clients before the Internal Revenue Service with the preparation of federal income tax returns, estate tax returns, and valuations of their related business interests.

Professional  
License

Certified Public Accountant since 1978 in Florida

Certified Financial Planner since 2000

Certified Valuation Analyst since 2008

Professional  
Affiliations

Member of the American Institute of Certified Public Accountants.

Member of the Florida Institute of Certified Public Accountants.

Member of the Certified Financial Planner Board of Professional Standards, Inc.

Member of National Association of Certified Valuators and Analysts.

Other  
Affiliations

Author of numerous income tax and business related aviation articles for various aviation industry publications.

Have held a private pilot airman's license since July, 1991 with approximately 125 total logged hours as pilot in command in three different types of aircraft.

Volunteer as an Ambassador to the University of Florida WUFT TV and radio broadcasting services through the Multi Media Division of the College of Journalism and Communications.

Volunteer to the University of Florida Advisor Network (UFAN) in my capacity as a Certified Public Accountant and a Certified Financial Planner.

Prepare and present presentations on topics such as current tax updates, Obamacare healthcare insurance, and planning for retirement withdrawals, distributions, and account transfer to surviving beneficiary.

Past member of the Florida Institute of Certified Public Accountants Common Interest Realty Association (CIRA) Committee.

Past member and Past President of the City of Ocala Airport Advisory Board.

Past member and Past President of the Ocala Lions Club.

Director Emeritus of the Southeastern Youth Fair in Ocala, FL.

Volunteer as a member of the advisory board of Build A Plane which is a non-profit IRC Section 501-C organization. Build A Plane is an organization dedicated to promoting aviation and aerospace by giving young people the opportunity to build real airplanes.

Seminar  
Presentations

January 21, 2014	2013 – 2014 Tax Update
August 5, 2014	IRA's, Tangible Property Regulations, Obamacare
December 10, 2014	2014 – 2015 Tax Update
December 17, 2014	2014 – 2015 Tax Update
January 20, 2015	2014 – 2015 Tax Update, IRA's, Tangible Property Regulations, Obamacare
July 16, 2015	IRA's, Tangible Property Regulations, Obamacare
July 30, 2015	IRA's, Tangible Property Regulations, Obamacare
January 11, 2017	2016 – 2017 Tax Update
January 25, 2017	Financial Planning for Seniors
November 13, 2017	WUFT Estate Planning Panel and Presentation
January 18, 2018	Ocala Rotary Club – 2018 Tax Law Update
January 29, 2018	2018 Tax Law Update
April 24, 2018	IRA Retirement Planning and the 2018 Tax Law
June 21, 2018	Estate Planning and the 2018 Tax Law
December 3, 2018	Introduction to the 2018 personal income tax return
February 20, 2019	How Well Are Our Current Estate Planning Practices Matching Up With The Tax Cut and Jobs Act?

January 28, 2020	2019 – 2020 Tax Update for Raymond James
February 2, 2020	2019 – 2020 Tax Update seminar
February 19, 2020	2020 IRA Beneficiary Designation Update