

# David Roy, Managing Director



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## Function and specialization

Valuation of Businesses, Business Interests, Intangible Assets, and Complex Equity Securities for financial reporting and tax regulatory purposes

## Education, licenses and certifications

- B.S. in Finance, Boston College, Carroll School of Management
- CFA Charterholder, CFA Institute

## Background

David is a Managing Director in KPMG LLP's Economic & Valuation Services practice and is based in Boston, Massachusetts. David has over 13 years of valuation experience and specializes in the valuation of businesses, intangible assets and various financial instruments for financial reporting, tax regulatory, and strategic business planning purposes.

## Professional and industry experience

David has been involved in a wide range of engagements including the valuation of business & business interests, intangible assets as well as stock options and other complex financial instruments. David's experience covers a wide range of industries for various purposes including valuations for mergers and acquisitions, corporate restructuring and financial and tax reporting. For example:

- Perform valuations across various industries including software, industrial products, healthcare, aerospace and defense, green technology, consumer products, and life sciences.
- Extensive experience in purchase accounting including the valuation of various intangible assets including technology, customer relationships, trademarks, patents, and non-competition agreements as well as deferred revenue and earn-out liabilities.
- Perform valuations for goodwill impairment, cross-border tax restructuring projects, fairness opinions, pricing analyses,, stock compensation, and general business planning purposes.

## Representative clients

Aavid Thermalloy, Adecco S.A, Ameresco Inc., athenahealth, Inc., Barnes Group, Inc., Boyd Corporation, Cabot Corporation, Cynosure, Inc., Desktop Metal, Digital Lumens, Inc., Dell/EMC, Excelitas Technologies Corp., Fidelity Investments, Global Partners LP, Legrand SA, LogMeIn, Mount Sinai Hospital, Northwell Health; Novanta, Inc., Nuance Communications, Inc., Ruffalo Noel Levitz LLC, SS&C Technologies, Inc., Taco, Inc., TRC Companies, Inc., United Technologies Corporation, Yamaha Corporation