

Please CC Rebecca Fairless on all emails

- Rebecca Fairless:
- Set up schedules
 - Invoicing
 - Project workflow
 - Client communication

- Laura Clifford, CPA:
- Firm Management
 - Return reviewer
 - Client consultants

- Johanna Turner, CPA, RLP:
- Financial planning
 - Return reviewer
 - Client consultants

- Ashley Walsh, CPA, MBA:
- Income Tax Returns
 - Tax projections
 - QB & bank rec reviewer
 - Return reviewer
 - Client consultants
 - Payroll set-up

- Caitlin Hare, EA:
- Income Tax Returns
 - Tax projections
 - QB & bank rec reviewer
 - Return reviewer
 - Client consultants

- Raleigh Parker, MBA, CPA candidate:
- Income Tax Returns
 - Tax projections
 - Tax correspondence
 - QB & bank rec reviewer
 - Processes monthly payroll

- Leila Farmer, CPA:
- Income Tax Returns
 - Tax projections
 - QB reviews

- Lucy Assad, EA:
- Income Tax Returns
 - Tax projections
 - QB reviews

- Ben Arnold, CPA
- Income Tax Returns
 - Tax projections
 - Tax correspondence

- Steve Goldberg, EA:
- Income Tax Returns
 - Tax projections
 - QB reviews

- Megan Vinson:
- Income Tax Returns
 - Processes monthly payroll
 - Qtr payroll returns
 - Bank reconciliations
 - Prepares 1099s
 - Create forms & templates

- Cynthia Mateo:
- Administrative assistance
 - Qtr payroll returns
 - Bank reconciliations
 - Prepares 1099s

- Jesse Ward:
- Qtr payroll returns
 - Bank reconciliations
 - Prepares 1099s
 - Accounts receivable
 - Accounts payable
 - Tax correspondence
 - Processes monthly payroll

- Melissa Johnson:
- Assist clients in office
 - Answers phones
 - Processes returns
 - Bank reconciliations
 - Organizes documents

- Ludonna Craig:
- Manages Liscio
 - Saves uploads to client files
 - Uploads files to clients
 - Starts all jobs

