Please CC Rebecca Fairless on all emails

Rebecca Fairless:

- Set up schedules
- Invoicing
- · Project workflow
- · Client communication

Ludonna Craig:

- Manages Liscio
- · Saves uploads to client files
- · Uploads files to clients
- Starts all jobs

Melissa Johnson:

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

Jesse Ward:

- Otr payroll returns
- Bank reconciliations
- Prepares 1099s
- · Accounts receivable
- Accounts payable
- Tax correspondence
- Processes monthly payroll

Cynthia Mateo:

- Administrative assistance
- Qtr payroll returns
- Bank reconciliations
- · Prepares 1099s

Megan Vinson:

- Income Tax Returns

Laura Clifford, CPA:

- Firm Management
- Return reviewer
- Client consultants

President

/ Owner

Johanna Turner, CPA, RLP:

- Financial planning
- Return reviewer
- Client consultants

Ashley Walsh, CPA, MBA:

- Income Tax Returns
- Tax projections
- **OB** & bank rec reviewer
- Return reviewer
- Client consultants
- Payroll set-up



President

Senior

Tax

Accountant



Meet Our

Team

Intern

Administrative

Support

Bookkeeper



Accountant

Caitlin Hare, EA:

- Income Tax Returns
- Tax projections
- QB & bank rec reviewer
- Return reviewer
- Client consultants



- · Income Tax Returns
- Tax projections
- Tax correspondence
- QB & bank rec reviewer
- Processes monthly payroll

Leila Farmer, CPA:

- Income Tax Returns
- Tax projections
- QB reviews

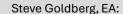


Lucy Assad, EA:

- Income Tax Returns
- Tax projections
- QB reviews



- Processes monthly payroll
- Qtr payroll returns
- Bank reconciliations
- Prepares 1099s
- Create forms & templates



- Income Tax Returns
- Tax projections
- QB reviews

Ben Arnold, CPA

- Income Tax Returns
- Tax projections
- Tax correspondence



& COMPANY CPAs