

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

Cynthia Mateo:

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

Edgar Garcia

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

Laura Clifford, CPA:

- Firm Management
- 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

