

ORGANIZATIONAL CHART

Spotlight: Tax Preparation Team

Michael Reeder, CPA

Owner

Maria Cunningham

Executive Assistant to Michael Reeder

Crystal Prado, MBA

CFO / CRO / Head of Accounting

Mackenzie **Swanson**

COO / Recruitment / Strategic Partnerships

Josh Levine, CPA

Director of Tax

Ben **Engel, MFA**

Director of Marketing

Michelle Watson

Admin Manager / Billing

Teddy

Ivanova

Jasmine

Payroll, Billing

Hodum

Scheduler & Outflow

Dani

Paul

Collins

Magallanes

Director of Sales

Onboarding Specialist

Tax Resolution

Supv. Josh Levine, CPA

Sophie McKenzie, EA

Contract Tax Resolution

Special Projects

Supv. Josh Levine, CPA

Tax Preparer, Tax Resolution Rania Ghallab, EA

Bookkeepers

Amber Flick Jen Rose **Kylie Nyboer Monica Long Karen Grovenstein** Jeilin Lalarta

Rebekah Roy, EA, MST

Senior Tax Manager

Thomas Kirk, EA

Senior Tax Reviewer

Central Region

~250 Returns

Supv. Josh Levine, CPA

Jay Thomas, CPA

Tax Preparer Sophie McKenzie, EA

Tax Preparer, Tax Resolution

Gerard Miles

Tax Admin

Tax Admin

Supv. Josh Levine, CPA

Jacob Orr, CPA M&A Tax Advisory

Northeast Region

~950 Returns

Supv. Rebekah Roy, EA

John Holmquist, EA Tax Preparer

Deepika Chauhan, EA Tax Preparer

Michael Shidler, JD, LLM

Tax Preparer

Aman Amani, EA Contract Tax Preparer

Melody Bauer Tax Admin

Erica Bishop Tax Admin

Midwest Region

~700 Returns

Supv. Thomas Kirk, EA

Krina Doshi, CPA

Michael Agarunov, CPA

Tax Preparer

Tax Preparer

Michelle Kintz Tax Preparer

Chanel Boxx Tax Admin

Lani Ruiz

Tax Admin

West Region

~200 Returns

Supv. Josh Levine, CPA

Terrance Jelks

Tax Preparer Gordon Kuaimoku, EA

Contract Tax Preparer

Reese Gonzalez

Southeast Region

~200 Returns

Supv. Josh Levine, CPA

Dayneris Hurtado, EA

Tax Preparer

Megan Mattingly Tax Admin

M&ATax Advisory

Keenyn Tiland

Contract Tax Preparer, New Entity Setup

Jean Christophe **Bulliet**, EA

Contract Tax Preparer