

A Smarter, Simpler Experience for You

In upholding my commitment to you, my role is to provide advice that is held to the fiduciary standard and is always in your best interests. That means starting with accurate information and making it easy for you to share.

This is why I have partnered with TaxStatus, a secure platform that allows you to share IRS-verified financial data directly with me, with your permission.

Benefits for both of us include:



Better Data, Less Hassle

Instead of you filling out a client data gathering profile and uploading your tax returns, your financial data can be shared with me directly from the IRS with your permission. This enables me to:

- Build more accurate strategies.
- Deliver advice based on your full financial situation.



Time Saved

A quick, secure authorization replaces traditional paperwork and improves accuracy from the start, fostering:

- Less need for follow-ups and repeated requests.
- Fewer delays.
- More time focused on your goals, questions, and planning opportunities.



Ongoing Visibility

I will receive earlier insight into important IRS account activity, allowing me to:

- Notify you about potential audits, penalties, or fraud attempts well ahead of receiving a notice in the mail.
- Stay up to date on new filings and provide you ongoing advice with tax savings opportunities.



Who is TaxStatus?

TaxStatus is a secure technology platform used by financial and tax professionals to access IRS-verified financial data with client permission—helping improve accuracy, efficiency, and overall service. www.taxstatus.com.

Your Security Comes First

Your data belongs to you, and the IRS states that every taxpayer has the right to view and share their own information. Through my partnership with TaxStatus, your data is only shared with me upon your consent and IRS approval. This data is protected with strong encryption and secure identity verification.