



WENDELL CHARLES
TAX

FIRM OVERVIEW

WHO WE ARE



Kayla Shay
VP, Client Services



Danny Ford
Co-Founder, President



Evan Kirkpatrick
Co-Founder

OUR APPROACH

We understand that taxes can be complex and confusing, and we are here to help our clients every step of the way. We take the time to get to know our clients and their unique tax situation, and we develop customized tax solutions that meets their needs and saves them money.

ARE WE COMPATIBLE?

We work with...

- ▶ Individuals & Families**
- ▶ Small Business Owners**
- ▶ Custom Advisory Solutions**



OUR SERVICES

TAX PREPARATION & FILING

We help you prepare your individual and/or business tax returns, including all necessary schedules and attachments.

TAX PLANNING & ADVISORY

There is no one-size-fits-all strategy to your individual tax needs. We'll help you develop a tax planning strategy that works specifically for you.

ACCOUNTING & CFO SERVICES

Our Accounting & CFO services allow your business to focus on what you do best. We'll take care of the rest.



ADVANTAGES OF WORKING WITH US

ACCURACY

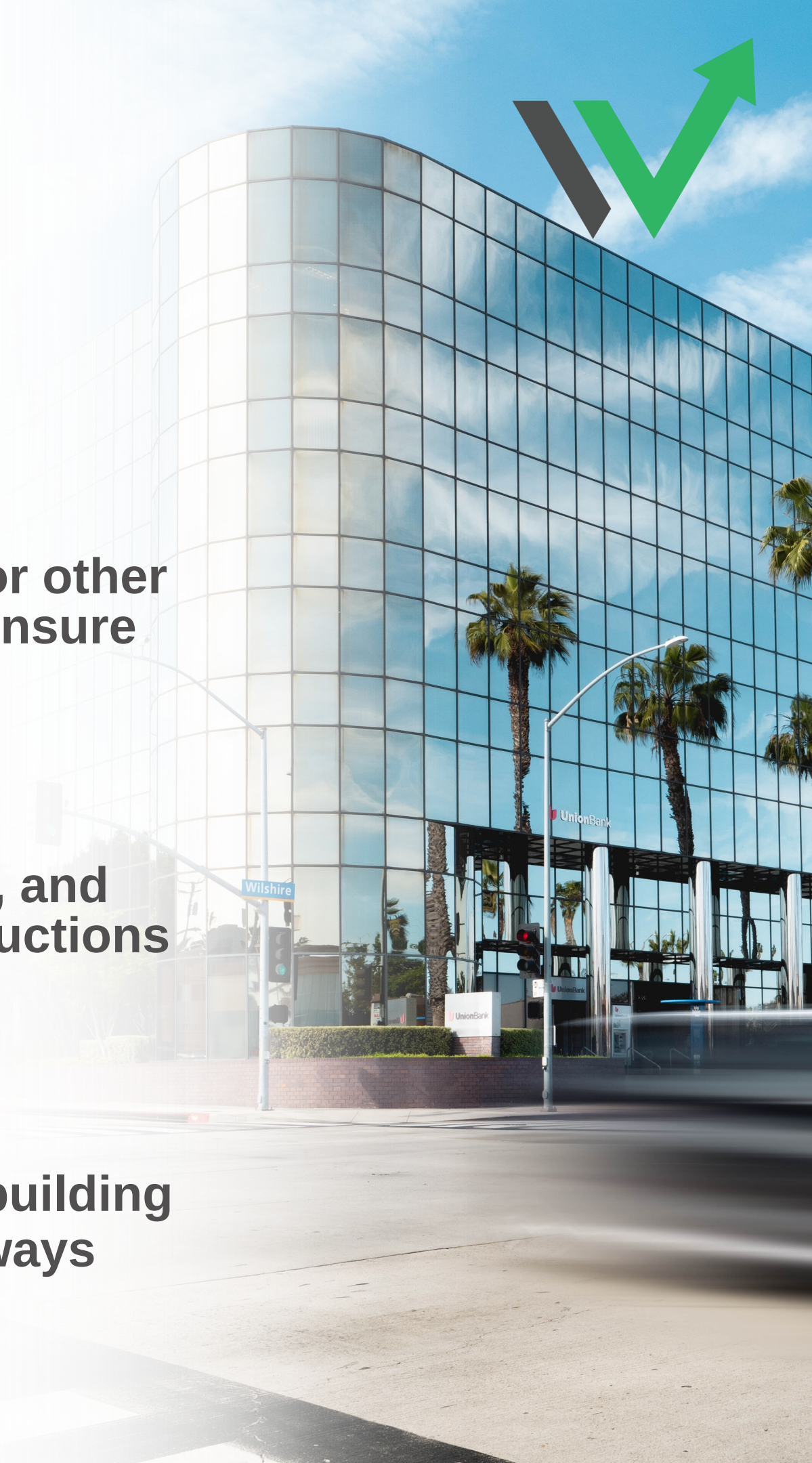
Even a small mistake on your tax return could lead to an audit or other penalties from the IRS. We utilize industry leading software to ensure this doesn't happen to you.

EXPERTISE

Our CPA's are up-to-date on the latest tax laws and regulations, and they can help you identify and take advantage of all the tax deductions and credits that you are eligible for.

CUSTOMER SERVICE

We believe that providing excellent customer service is key to building strong relationships with our clients. That's why our team is always looking for ways to improve and enhance our services.



LPL TAX ADVISORY PARTNERSHIP

NASDAQ: LPLA



PROFESSIONAL & LEGAL ANALYSIS

Aiming to remove the uncertainty and guesswork of what you can benefit from a tax plan.



CLEAR ACTION PLANS & EXPLANATIONS

Our tax professional and attorney run scenarios and use tax code strategies to find beneficial tax-saving actions.



'WHAT IF' SCENARIOS

Written directly by our tax professionals, it is an actionable plan with clear and specific recommendations tailored to your goals.



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LPL TAX ADVISORY PARTNERSHIP

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CLIENT VALUE SCENARIOS

- Change of filing status
- Stock options
- Trusts
- Business buy/sell
- Business expansion
- Household employment



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NEXT STEPS



Upload Requested Documents



Sign Engagement Letter



Receive Tax Services & Reports

Danny Ford

Co-Founder

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WENDELL CHARLES
TAX

STREAMLINE YOUR FINANCIAL LIFE



WENDELL CHARLES
INSURANCE

Personal Lines of Insurance

Specialty Lines of Insurance

Commercial Lines of Insurance

Jeff Silvernail

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WENDELL CHARLES
WEALTH MANAGEMENT

Wealth Management

Financial Planning

Risk Management

Evan Kirkpatrick

Founder & CEO
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WENDELL CHARLES
TAX

Tax Prep & Filing

Tax Planning & Advisory

Accounting & CFO Services

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