



Welcome to NAEA's Find a Tax Expert Directory!

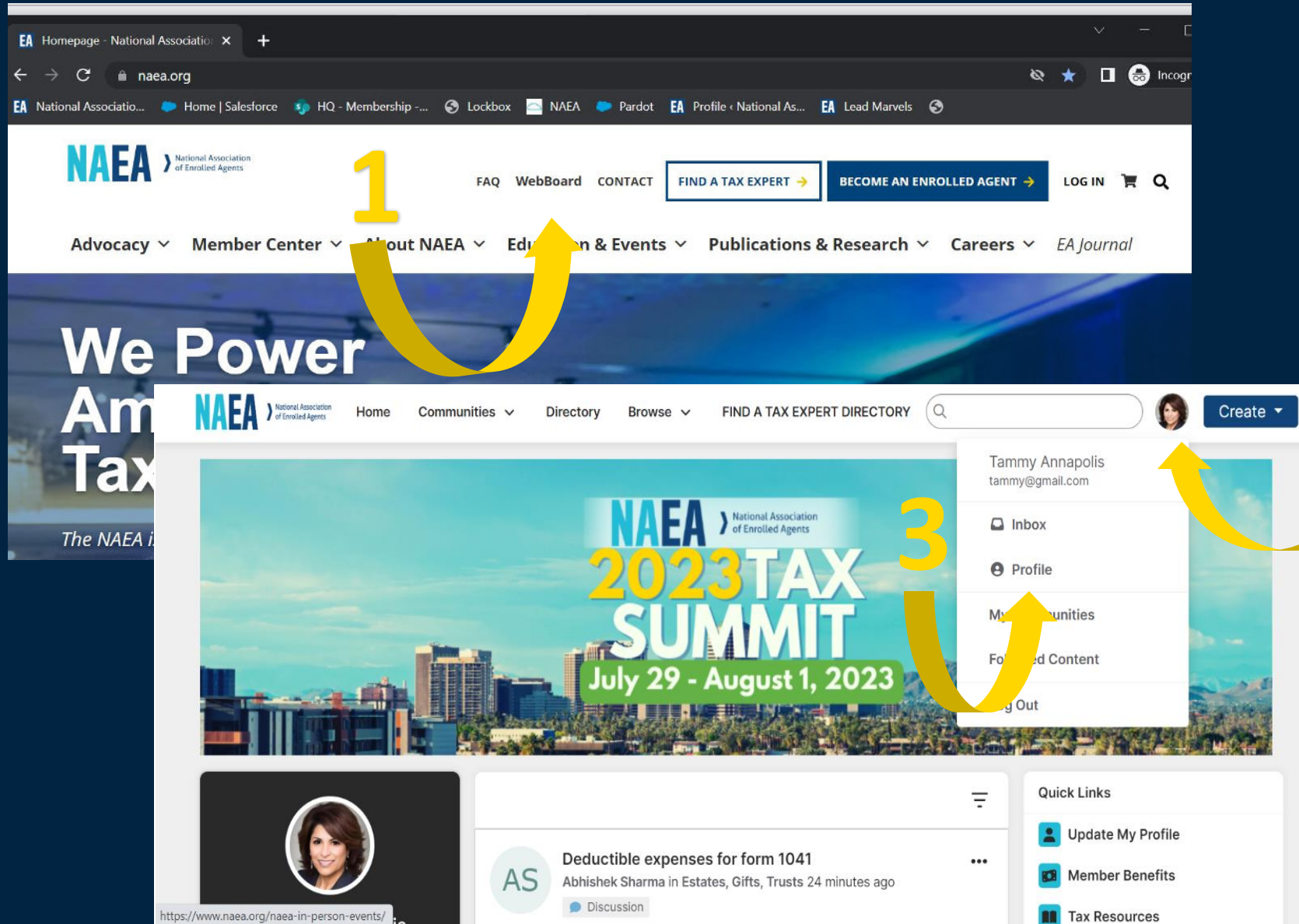
NEW FEATURES

NAVIGATING THE FIND A TAX EXPERT DIRECTORY:

HOW TO GUIDE

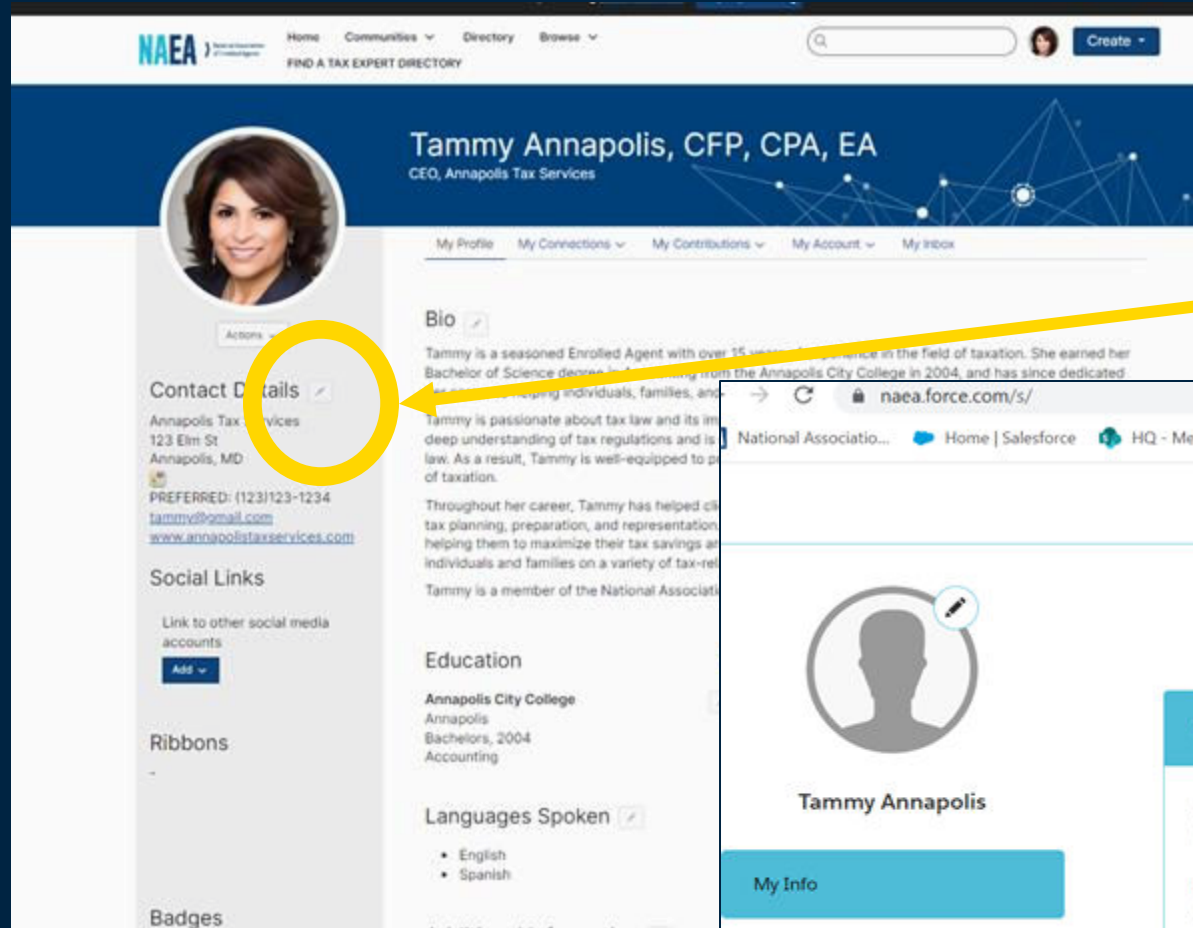
- ▶ Updated, modern look and feel
- ▶ More fields to make your profile stand out to client
- ▶ Fully customization of your profile – you choose what information to share with potential clients
- ▶ Update your profile in real time
- ▶ Control all your NAEA Profile information from one place, with one login

ACCESS YOUR "FIND A TAX EXPERT" PROFILE



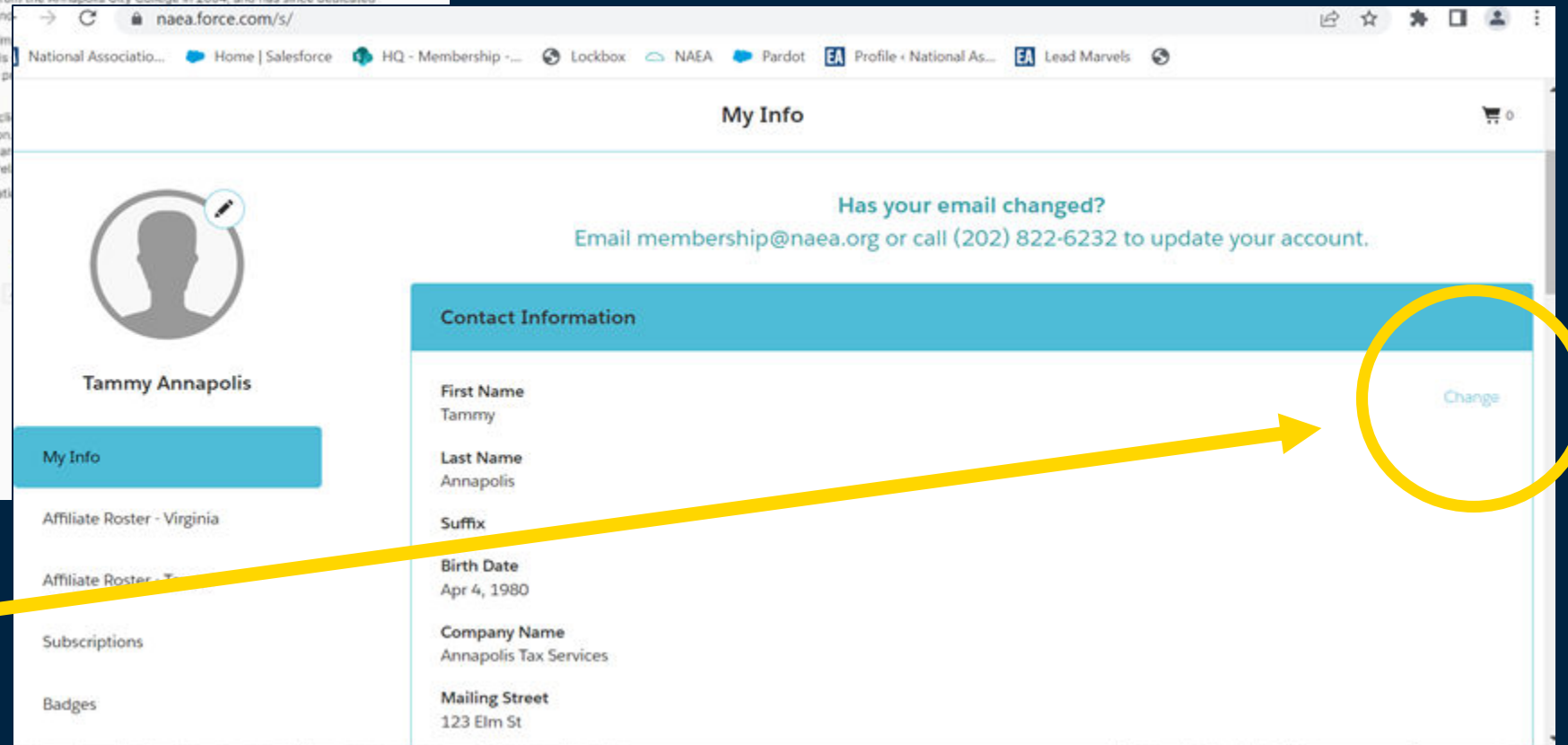
1. Login to the NAEA website and click on "WebBoard"
2. Click on the circle with your initials or picture in the upper right corner.
3. Select "Profile" from the dropdown menu.

UPDATE YOUR CONTACT INFORMATION



The left panel is your contact information from the NAEA Database. This is the address that will be visible to the public in your “Find a Tax Expert” directory listing.

Click the pencil to update your contact info



Click on “Change” to edit these fields.

COMPLETE YOUR PROFILE

NAEA National Association of Enrolled Agents
Home Communities Directory Browse
FIND A TAX EXPERT DIRECTORY

Tammy Annapolis, CFP, CPA, EA
CEO, Annapolis Tax Services

Bio [Edit]

Tammy is a seasoned Enrolled Agent with over 15 years of experience in the field of taxation. She earned her Bachelor's degree in Accounting from the Annapolis City College in 2004, and has since dedicated her career to helping individuals, families, and businesses navigate the complex world of taxes.

Tammy is passionate about tax law and its impact on individuals and businesses alike. She has developed a deep understanding of tax regulations and is committed to staying up-to-date with the latest changes in tax law. As a result, Tammy is well-equipped to provide her clients with sound advice and guidance on all aspects of taxation.

Throughout her career, Tammy has helped clients of all sizes with a wide range of tax-related issues, including tax planning, preparation, and representation. She is particularly skilled in working with small businesses, helping them to maximize their tax savings and reduce their overall tax burden. Tammy has also worked with individuals and families on a variety of tax-related matters, including estate planning and retirement planning.

Tammy is a member of the National Association of Enrolled Agents (NAEA) and NTPI fellow.

Education [Add] [Edit]

Annapolis City College
Annapolis
Bachelors, 2004
Accounting

Job History [Add] [Edit]

Annapolis Tax Services
President & Owner
Annapolis, MD, United States

Languages Spoken [Edit]

- English
- Spanish

Contact Details [Edit]

Annapolis Tax Services
123 Elm St
Annapolis, MD
PREFERRED: (123)123-1234
tammy@gmail.com
www.annapolistaxservices.com

Social Links

Link to other social media accounts
[Add]

Ribbons

Badges

**CLICK ON THE PENCIL TO
EDIT EACH SECTION**

**Don't forget to add
your photo!**

**Pro Tip: If you're stuck on what to
write for your Bio and Company
profile, check out ChatGPT.**

**This entire profile, including the
bio was written by Artificial
Intelligence.**

**For best results, give it some
bullet points specific to you and
ask for a 300-word bio for an
enrolled agent.**

EDIT YOUR PRIVACY SETTINGS

From your Profile Page, Click
**My Account => Privacy
Settings**

Your privacy settings determine what
information is displayed on the public Find
a Tax Expert Directory and the private
Member's Only Directory.

By default, only your fax, city, state, and
zip code are displayed on the Find a Tax
Expert Directory.

You have complete control over what
information you would like visible on your
profile by adjusting your privacy settings.
See the next slides for details.

NAEA National Association of Enrolled Agents

Home Communities ▾ Directory Browse ▾

FIND A TAX EXPERT DIRECTORY

Tammy Annapolis, CFP, CPA, EA
President & Owner, Annapolis Tax Services

My Profile My Connections ▾ My Contributions My Account ▾ My Inbox

Privacy Settings
Email Preferences

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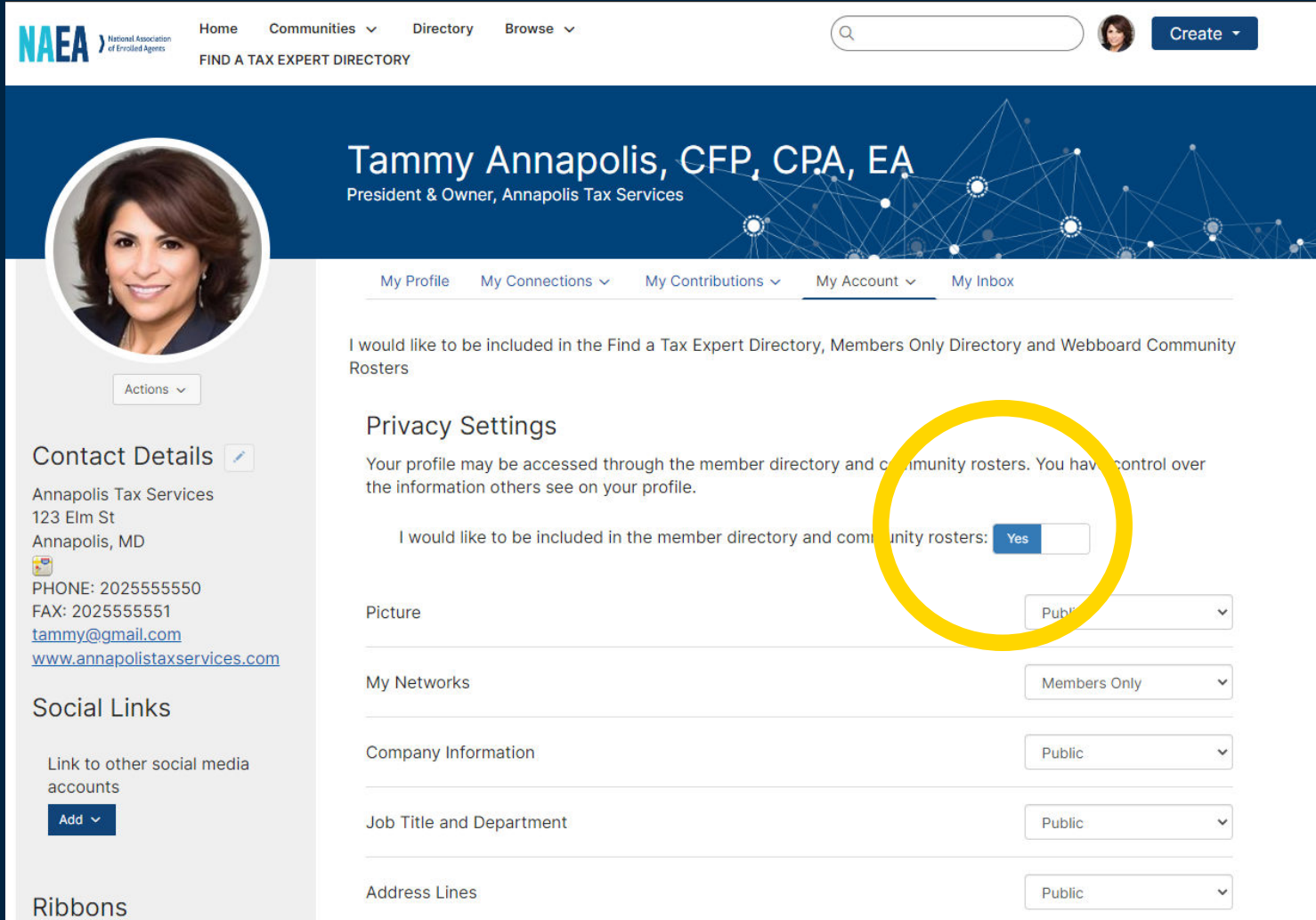
Annapolis Tax Services
123 Elm St
Annapolis, MD
PHONE: 2025555550
FAX: 2025555551
tammy@gmail.com
www.annapolistaxservices.com

Social Links

Link to other social media accounts
Add ▾

Ribbons

OPT OUT OF EVERYTHING



NAEA National Association of Enrolled Agents

Home Communities Directory Browse

FIND A TAX EXPERT DIRECTORY

Tammy Annapolis, CFP, CPA, EA
President & Owner, Annapolis Tax Services

My Profile My Connections My Contributions My Account My Inbox

I would like to be included in the Find a Tax Expert Directory, Members Only Directory and Webboard Community Rosters

Privacy Settings

Your profile may be accessed through the member directory and community rosters. You have control over the information others see on your profile.

I would like to be included in the member directory and community rosters: ☒ Yes

Picture

My Networks

Company Information

Job Title and Department

Address Lines

Contact Details

Annapolis Tax Services
123 Elm St
Annapolis, MD
PHONE: 2025555550
FAX: 2025555551
tammy@gmail.com
www.annapolistaxservices.com

Social Links

Link to other social media accounts

Add

Ribbons

This setting offers the most privacy. Your name and contact information will **NOT** be visible in any of the following:

Find a Tax Expert Directory

Member's Only Directory

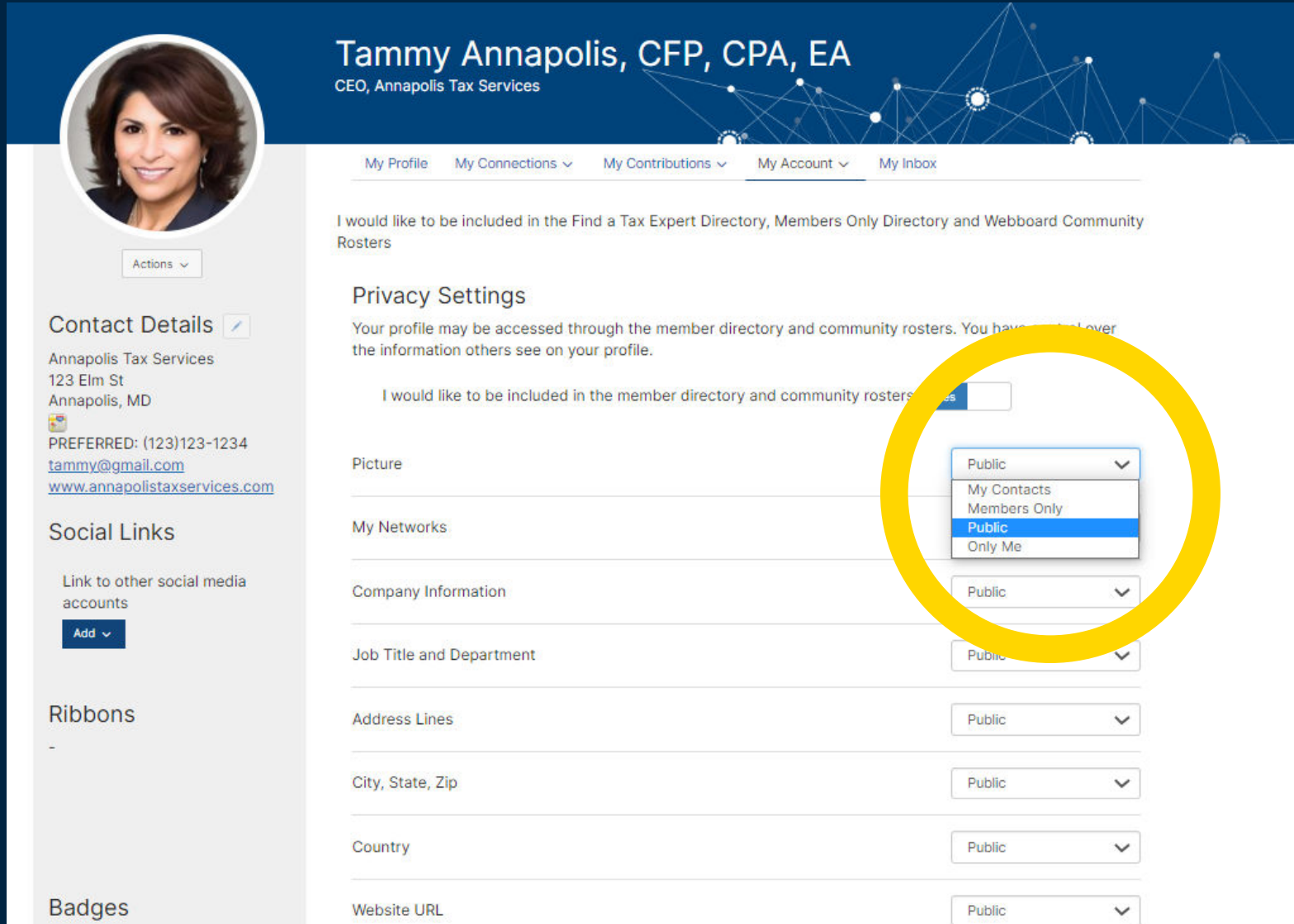
Community Rosters (WebBoard)

Slide the switch next to “I would like to be included in the member directory and community rosters” to the **NO** position.

***Note that it may take up to 24 hours for changes to take effect.**

DECIDE WHO SEES WHAT

For each section, select from the dropdown menu who sees what information.



Tammy Annapolis, CFP, CPA, EA
CEO, Annapolis Tax Services

My Profile My Connections My Contributions My Account My Inbox

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I would like to be included in the member directory and community rosters ☐

Picture	<div>Public</div>
My Networks	
Company Information	<div>Public</div>
Job Title and Department	<div>Public</div>
Address Lines	<div>Public</div>
City, State, Zip	<div>Public</div>
Country	<div>Public</div>
Website URL	<div>Public</div>

Contact Details

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PREFERRED: (123)123-1234
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Ribbons

Badges

PUBLIC

- This is your Tax Expert Profile. Members of the public will be able to see this in your Directory Listing

MEMBERS ONLY

- Only NAEA Members can see this information

MY CONTACTS

- Only NAEA Members you have added as a contact can see this information

ONLY ME

- Only you will see this information.

STILL HAVE QUESTIONS?



Email us at
membership@naea.org



Give us a call at
(202) 822-6232

The Membership Team at NAEA is always available to help!