Welcome to NAEA’s Find a Tax Expert Directory!

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

NEW FEATURES
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

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.
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.
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.

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!