

# Paller Financial Services, Inc.

## Company Staff

**Noelle Kurtz, Notary**, Office Manager – Noelle is responsible for data gathering, scheduling, paperwork processing, vendor relationships, and general management of the office.

**Kim Klein, Notary**, Bookkeeper and Tax Preparer – Kim is the firms Bookkeeper, provides small business QuickBooks support and prepares taxes. She also assists Noelle with her duties and acts as our Chief Operations Officer.

**Jamison White, CFP/EA Candidate** – Jamison is an advisor in training. He supports the other staff and acts as the firm’s resident technology expert.

**Anjali Garud, EA** –Anjali is an income tax preparer and helps with tax processes.

**Judy Wilson, CPA** – Judy focuses on tax planning, preparation and tax notice responses while working with Kim on the firms small business accounting services.

**Mark Mogle, CFP, EA** – Mark collaborates with Paller on investment management, provides financial planning services, prepares income tax returns, and oversees our small business retirement plan services (401k’s). Mark is our Chief Compliance and Marketing Officer.

**Mark Paller, CPA/PFS, CFP** – Paller assists the staff with their duties and performs investment analysis, financial planning, tax preparation, and planning. Paller is the firm’s Chief Investment and Executive Officer.

Of Counsel – Paller Financial has had the pleasure of working with and incorporating the business of David Tagieff, CPA; Jackie Chipman, CPA; Bob and Kathy Lees, CPAs; and Matt Potts, CPA. We are proud to report that each of these professionals continues to offer their counsel.

Service Offerings		
Investment Management	Income Tax Preparation	Accounting Support Services
Financial Planning	Income Tax Planning	Small Business Planning
Small Business Retirement Plans		Senior Support Services