

ELM STREET TAX LLC

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Welcome to Elm Street Tax LLC, a new business with familiar faces which now includes Paul Marciano, CPA and his entire team in the Beverly office. I am Matt Schroeder, CFP, the founder of Elm Street Tax LLC. For 25 years I have been working with clients on their financial planning needs and collaborating with tax professionals to ensure alignment for the clients' planning needs. Overall, the demand for quality tax planning is increasing while the majority of tax professionals are getting older, carry an abundant workload and lack a next generation of talent to pass the torch to.

My vision for Elm Street Tax LLC is to build a collaborative organization of experienced tax professionals that will invest in attracting the next generation to meet the needs of the community.

My commitment to the North Shore community is strong. As a past president of the Greater Beverly Chamber of Commerce, past President of the Danvers Rotary and current chair of the professional advisors committee at Essex Community Foundation (ECCF) I am aware of the challenges that families and small business face and the impact that effective tax planning can make.

I have been working with Paul Marciano, CPA for over a year to develop a plan to ensure an effective transition for Paul, his team and his valued client base. Our priorities are simple:

1. Deliver high quality tax services for existing and new clients – Paul will remain the head of the tax business and his team are committed to returning to ensure the quality of work remains high.
2. Timely and effective communication – tax season is busy and stressful for all. We are committed to being present and providing timely replies when we are not immediately available.
3. Enhancing the client experience for the future – We will introduce technology options that will enhance the preparation process and communication channels. We will introduce expanded capacity for tax and financial planning. We will invest in staffing to account for future needs.

We at Elm Street Tax LLC are excited by the opportunity to work with you on your tax preparation and planning needs for Tax Year 2024 and beyond. If you have any questions or concerns please feel free to contact me at matt@elmstreettax.com.

Regards,

Matt Schroeder, CFP
Managing Partner
Elm Street Tax LLC