



SERVICES

Consulting for Individuals
Employee Benefit Plans
Tax Services

CERTIFICATIONS

- Certified Employee Benefit Specialist
- Quickbooks ProAdvisor Certification

EDUCATION

- B.S., Insurance, The Pennsylvania State University

VICKI MCLENNAN

SHE | HER

TAX ASSOCIATE

vmclennan@orba.com

📞 312.670.7444

Vicki McLennan serves as a Tax Associate in ORBA's Tax Department. She assists our clients with bookkeeping and prepares federal and state tax returns for individual and trust clients, including forms 1040, 1041 and 709. In prior roles, Vicki has negotiated IRS appeals, coordinated tax filings, handled client invoicing, and utilized QuickBooks. She also serves as a member of ORBA's Women's Alliance Group.

PROACTIVE

Vicki's extensive knowledge of IRS rules and regulations as well as state and local tax laws reassures our clients that they are receiving excellent tax advice. Her attention to detail and high-level knowledge of tax laws keeps our client's tax liabilities to a minimum by leveraging deductions and exemptions. She is acutely attuned to any deadlines in play regarding our client's returns to ensure the avoidance of late fees and penalties.

OUTSIDE OF THE OFFICE

Outside of the office, Vicki enjoys spending time with family and friends, especially her Grand Niece Serafina. She also loves to travel, listen to live music and partake in food and wine tastings.

CIVIC ACTIVITIES

- Cub Scout and Boy Scout Leader
- Clothing Exchange Sub Chair for School Fundraiser
- Religious Education Teacher for Pre-School
- Christian Education Committee