



Jeffrey Walch CPA
Senior Manager

Call: 351-222-4837 | Email: jwalch@edelsteincpa.com

MEET JEFF

Jeff leads Edelstein & Company's Client Accounting Solutions team. With over 10 years of combined experience in both public and private accounting, Jeff's well-rounded background provides clients with a unique perspective. Jeff earned his CPA and MST during the first five years of his career in public accounting at Edelstein. He then left Boston altogether to start a career in the private industry in Colorado, where he began working for a startup energy company one year into operation. There, Jeff worked on building out the accounting reconciliation templates, accounting and finance processes, and the monthly financial package, post close metrics, and analysis.

Five years later, Jeff finished his work as a Controller and Director of Finance for a transportation and logistics company. In this role, Jeff streamlined processes, managed cash flow, prepared annual forecasts, and provided key insights as a part of their executive team.

Jeff is now back to where it all started at Edelstein. As a trusted business professional and partner, Jeff relies on concrete experiences to advise business leaders. Clients value Jeff's ability to create tailored performance packages that deliver financial performance, key metrics and information, and trends that allow leadership to make informed decisions.

Jeff works directly with business owners who rely on his practical advice and collaborative approach to advance their organization's mission.

BACKGROUND

With over 10 years of combined experience in both public and private accounting, Jeff's well-rounded background provides clients with a unique perspective. Jeff earned his CPA and MST during the first five years of his career in public accounting at Edelstein. He then left Boston altogether to start a career in the private industry in Colorado, where he began working for a startup energy company one year into operation. There, Jeff worked on building out the accounting reconciliation templates, accounting and finance processes, and the monthly financial package, post close metrics, and analysis.

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160 Federal Street, 9th Floor
Boston, MA 02110

TEL: 617-227-6161
FAX: 617-589-0530

edelsteincpa.com



HOW JEFF CAN HELP

- Cash flow management
- Bill pay and accounts payable
- Paperless Automation
- Transaction processing
- Dashboards and financial metrics
- Budgeting & Forecasting
- Business consulting and advice
- PPP & ERTC Guidance
- Department structure and staffing

EDUCATION

Bachelor of Science in Accounting, Merrimack College

Master of Studies in Tax, Suffolk University

PROFESSIONAL AFFILIATIONS

BDO Alliance USA

Massachusetts Society of CPAs