

160 Federal Street, 9th Floor
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TEL: 617-227-6161
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edelsteincpa.com



Catherine Dwan

Senior Manager Operations & Administration

Call: 617-261-6594 | Email: cdwan@edelsteincpa.com

MEET CATHY

Cathy leads Edelstein's Tax Administration team. Her team is responsible for the tax organizers for our 1040 clients, bringing in source documents for 1040 and 1041 clients, delivering tax returns to clients, processing 1099s, e-files for all clients, and extensions for all clients. Cathy works heavily with the following software:

- CCH Axxess Tax
- CCH Axxess Workflow
- SafeSend Suite
- CCH Document
- Practice CS
- Track 1099
- Electronic Filing Status System

BACKGROUND

Cathy began her career at Edelstein in 2022. As a Senior Manager in the firm's Operations and Administration Group, Cathy and her team provide direct support to the Tax and Healthcare departments.

HOW CATHY CAN HELP

- Delivering tax returns to clients
- E-Filing returns, extensions, 1099s
- Sending organizers
- Workflow questions and assist with creating tasks or any workflow questions or issues
- SafeSend questions internally or externally
- Processing 1099s, returns, E-Files and extensions

EDUCATION

Bachelor of Science in Business Management, Providence College

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PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants (AICPA)

Massachusetts Society of Certified Public Accountants (MSCPA)