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MEET DENIS

Denis leads Edelstein & Company's Wealth Management Practice.

BACKGROUND

Denis began his accounting career at Edelstein & Company, and later served in management roles in the private sector. He worked in the investment management group of a Big Four accounting firm, and then returned to Edelstein in 2002 to oversee a growing and diverse commercial audit practice. Denis has a Masters in Finance and earned the Chartered Financial Analyst and Certified Financial Planner designations.

EDUCATION

Master of Science in Finance, Boston College

Chartered Financial Analyst and Certified Financial Planner Designations

Bachelor of Science in Business Administration, University of Massachusetts (Amherst)

PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants (AICPA)

Boston Society of Security Analysts

CFA Institute

Financial Planning Association

Massachusetts Society of Certified Public Accountants (MSCPA)