



*Jennifer Ann Waltzer, MBA*

CERTIFIED PUBLIC ACCOUNTANT

CPA Jennifer Ann Waltzer is an accountant, tax advisor and financial planner with particular expertise in working with entrepreneurs, small and women - owned businesses. Over the past fourteen years she has helped scores of business owners navigate a path through the maze of state and federal regulations. The owner of her own small business, Ms. Waltzer takes the time to understand each client's particular needs advising them in tax and financial planning, including securing appropriate insurance services and retirement planning.

Born in Los Angeles, California, Ms. Waltzer earned her Bachelor's degree in accounting and economics at Whittier College. She trained with the prestigious accounting firm Arthur Young and Company (now Ernst & Young) in the areas of auditing and taxation, earning her CPA certificate from the State of California in 1982. Shortly thereafter, Ms. Waltzer joined Century 21 Real Estate Corporation as Internal Auditor, travelling around the country to analyze their franchise operations, budgets, advertising expenditures and accounting procedures. In the fall of 1984, Jennifer moved to Boston to earn her MBA degree at the esteemed Harvard Business School.

Ms. Waltzer graduated from Harvard Business School in 1986 with an MBA emphasizing marketing and operations. She was immediately hired as a commercial loan officer by the First National Bank of Boston, then rapidly promoted to Assistant Vice President. In this capacity, Jennifer's responsibilities expanded to include marketing, customer service and loan administration for a four-state territory. Her clients ranged from two million dollar start-up businesses to major multinational corporations. She returned to California to open her own business, in 1991, as a CPA providing state-of-the-art financial and tax services.

Active in many professional organizations, Jennifer is a participating member of the American Institute of CPA's (AICPA), the California Society of CPA's (CSCPA), American Women's Society of CPA's (AWSCPA), the National Organization of Women Business Owners (NAWBO), Women's Referral Service (WRS), Women In Management (WIM) and the Harvard Business School Association of Southern California. Ms. Waltzer also volunteers as a trainer and counselor with the American Women's Development Corporation (AWED), teaching women entrepreneurs accounting, tax, recordkeeping, financial statement analysis and business regulation compliance.

Jennifer and her husband live in Santa Monica. They are active with the charitable organizations Partners for Children, a support group for Culver City's ERAS Center, and the Clearing House for Volunteer Accounting Services (CVAS). Their true passion, though, is ballroom dancing. They can be seen at many large social events around the city performing with the Beverly Hills Ballroom Formation Dance Team.

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