

# MICHAEL R. KOEPPPEL, CPA, CTP, CGMA, CITP, ABV, CFF

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## Executive Summary

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As a business transformation strategist, C-level leader, and Board Director, I bring a record of success and expertise in driving sustainable growth and turning around businesses in the manufacturing, technology, medical device, and finance sectors. I excel at driving efficiencies across complex international entities applying experience in over 30 countries, structuring M&A opportunities and business consolidations, and repositioning organizations for successful exits and IPOs. By effectively communicating complex subjects and illustrating a compelling vision for change—I inspire top performance and rapidly earn the trust of Boards, executive teams, employees, and stakeholders.

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## Core Competencies

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Executive Leader	Accounting & Finance	Global Operations
Board Director	Process Development	Vendor / Agency Management
Strategic Advisor	Spin-offs, Divestitures, IPOs	Complex Negotiations
Revenue & Profit Growth	Asset Valuation	Recruiting Top Talent
Turnarounds & Restructuring	Private Equity	Mentoring & Team Building
M&A, Acquisition Integration	Financial Forensics	Thought Leadership
Efficiency & Optimization	Trends & Forecasts	Corporate Governance
Cost Control	P&L, Budget Responsibility	Speaking & Presentations

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## Board & Advisory Appointments

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**NYSSCPA – New York State Society of Certified Public Accountants** | Director at Large (2021 – 2023)

**FAE – Foundation for Accountancy Education** | Restructuring Task Force (2020 – Present)

**NYSSCPA Bankruptcy and Financial Reorganizations Committee** | Chairman (2016 – 2021)

**Kree Technologies** (International Medical Device Company) | Board of Directors / Interim COO (2007 – 2008)

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## Operating Experience

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### Managing Director & Founder | (2002 – Present)

Lakelet Advisory Group LLC – New York, NY / Toronto, ON / Los Angeles, CA

A highly regarded international turnaround firm, Lakelet Advisory Group leads restructuring initiatives, M&A advisory services, acquisition integration efforts, and leadership development solutions for businesses worldwide.

- Lead advisory engagements and developed detailed financial solutions for entities facing substantial challenges, including restructuring, turnarounds, and bankruptcy. Assisted more than 100 domestic and international clients to drive improvements in strategy, restructure operations, restore profitability, and reach their optimal value.

### Vice President | (1997 – 2003)

Citigroup Venture Capital Co. – Indianapolis, IN / Los Angeles, CA

Led restructuring, turnaround, and spin-off initiatives to solve complex challenges for international businesses. Served as Management Committee member to turnaround operations and prepare for successful sales and IPOs.

- **Vice President (Executive Management Committee)** | \$300M International Medical Manufacturer & Distributor (2000 – 2002) – Led the turnaround of the company operations and played a pivotal role in the successful sale of the company. In just 12 months, integrated three companies into one, reengineering warehouse and transportation facilities, and reduced costs by 34%. Managed 4 direct reports, a team of 26, multiple outsourcing partners, and a budget of \$17M.
- **Corporate Director (Executive Management Committee)** | \$980M International Automotive Component Manufacturer (1998 – 2000) – Led a carve-out of the business, implemented manufacturing concepts in nine factories, recruited and trained a new team focused on process optimization, and captured a net savings of 11%. Directed multiple acquisitions and assisted in the IPO of the company. Managed 3 direct reports, a team of 46 personnel, and a budget of \$31.5M.

## **Leading IT Executive of Holding Company | (1991 – 1997)**

LucasVarity Corporation – Buffalo, NY / London, UK

12-month assignment in UK. Focus on consolidating two \$6B entities – Areas of responsibility included IT and Working Capital.

## **Other Experiences**

**PriceWaterhouseCoopers** (1982 – 1987)

Focused on distressed entities and technology. Worked internationally to conduct firsthand advisory engagements, including a 3-year+ project in Brazil and an 18-month assignment in the UK.

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## **Education**

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**Master of Accountancy** | Bowling Green State University – Bowling Green, OH

**Bachelor of Arts, Economics** (Summa Cum Laude) | State University College of New York – Buffalo, NY

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## **Certifications & Credentials**

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**Expert Witness – Bankruptcy Valuations and Intangible Assets** | (Active)

**CPA – Certified Public Accountant** | AICPA (Active)

**ABV – Accredited in Business Valuation** | AICPA (Active)

**CFF – Certified in Financial Forensics** | AICPA (Active)

**CTP – Certified Turnaround Professional** | Turnaround Management Association (Active)

**CITP – Certified Information Technology Professional** | AICPA (Active)

**CGMA – Chartered Global Management Accountant** | AICPA (Active)

**Advanced SOC for Service Organizations Certificate** | AICPA (Active)

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## **Professional Affiliations**

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**TMA – Turnaround Management Association** | Current Member

**AICPA – American Institute of Certified Public Accountants** | Current Member

**NYSSCPA – New York State Society of Certified Public Accountants** | Current Member

**ACFE – Association of Certified Fraud Examiners** | Current Member

**RPCN – Rochester Professional Consultants Network** | Current Member

**ACG – Association for Corporate Growth** | Current Member

**State University of New York College Buffalo Alumni Association** | Current Member

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## **Interviews, Publications & Media Coverage**

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**Enrolled Agents Journal** | “Optimizing the Offer in Compromise” – Article (submitted 9/2021)

**Buffalo Law Journal** | “Effective Turnaround Programs for Distressed Healthcare Systems” – Guest Column (2016)

**Article 9** | “Challenges Associated with Turnarounds” – Article (2014)

**ICMA** | “A Tale of Two Turnarounds: A Look at For-Profit Vs. Government Agency Turnarounds” – Article (2014)

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## **Recent Speaking Engagements & Presentations**

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**NYSSCPA Business Valuation Conference** | Guest Speaker: “Challenges in Valuing Distressed Entities” (2021)

**NYSSCPA** | Joint Committee Presentation: “Factors in Business Valuation of Distressed/Bankrupt Entities” (2020)

**NYSSCPA** | Committee Panel Leader: “Current Financing Challenges” (2020)

**NYSSCPA** | Committee Presentation: “Current Bankruptcy & Restructuring Environment” (2020)

**NYSSCPA** | Committee Presentation: “Current Trends and Predictions” (2019)

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## **Teaching & Curriculum Development Experience**

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**Corporate Taxation and Econometrics** | State University College of New York at Buffalo – Buffalo, NY

**Technology Optimization** | PricewaterhouseCoopers (PwC) – United States & Brazil

**Current Trends in Financial Forensics** | Canisius College, Financial Forensics Master’s Program – Buffalo, NY

**Case Studies on Financial Forensics** | State University of New York at Fredonia – Fredonia, NY

**Mentor** | Canisius College, Women’s Business Development Program – Buffalo, NY