

Michael Lopata CPA

Motivated professional dedicated to community service, proficient in financial analysis, understanding of accounting principles, risk assessment, data analysis, critical thinking, communication skills, and thorough attention to detail. Demonstrated commitment to achieving results, upholding high ethical and professional standards, and possessing strong analytical and problem-solving abilities.

Experience

Wealth Preservation and Succession Specialist - Sagemark Consulting

4/2010 to Current

Creating written financial and strategic plans while incorporating financial forecasts, cash flows, financial statements, and other documentation.

Developing transition/exit plans for a variety of businesses. This may involve passing down a family business from generation to generation, transferring a business to employees, or determining marketability for an ultimate sale.

Managing business productivity in various businesses by using deadlines and enforcing accountability through metric-driven facts and data.

Communicating the complexities of financial strategies while simplifying financial terms and delivering uncomplicated advice.

Advisor - American Express Financial Advisors

10/1994 to 3/2010

Worked with a variety of business and personal cases and developed a solid knowledge of comprehensive financial planning.

The business planning portion involved business valuations, analysis of financial statements, and developing transition/exit plans.

Financial Auditor - Congress Financial

9/1985 to 10/1994

Worked on the audit staff and analyzed the financial and business operations of companies with loans ranging from \$5,000,000 to \$100,000,000.

Fraud discovery through the various processes and tests we performed.

Skills

Maintains a high level of discretion when dealing with confidential information.

Excellent organizational and time management skills.

Able to communicate practical information to others that don't have accounting knowledge.

Strong analytical skills.

Education

Bachelor of Science in Accounting Florida State University

Active CPA license in the state of Georgia

Activities

Member Financial Literacy Committee Georgia Society of CPAs

Vice President Dekalb Chapter of the Georgia Society of CPAs

Mentor SCORE Atlanta Resource partner of the SBA

PAWS Atlanta Volunteer