

DAVID J. LEPAK
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SUMMARY

Results-oriented financial professional with diverse public and private sector background, in-depth experience and documented accomplishments. Outstanding financial background with strong understanding of financial statements, budgeting, bookkeeping and financial analysis. Strong leadership and management skills with experience in organization management, including strategic planning, project management, budget development and personnel management. Exceptional written and verbal communication skills with demonstrated ability in public presentations, relationship development and building strategic alliances. Highly motivated with reputation as an organizer and leader.

EXPERIENCE

DAVID LEPAK & ASSOCIATES, LLC, Milwaukee, Wisconsin **2003-Present**
"Freelance" real estate development firm specializing in project management and financial analysis consulting.

Owner and President

On a consulting basis, provide real estate development expertise to clients throughout Wisconsin.

- Project management consultant to Rivianna Group, LLC – completed detailed financial analysis and successfully obtained preliminary government approvals for \$80 million mixed-use development located in Milwaukee, Wisconsin.
- Project management consultant to The Kilduff Company for \$20 million mixed-use, Brownfield redevelopment in Kenosha, Wisconsin – lead efforts to obtain municipal approvals for site re-zoning and conditional-use permit, developed project budget, completed detailed financial analysis, developed loan package and successfully negotiated lease with market-leading grocery store chain Pick ‘n Save.
- Consultant to The Kilduff Company during International Council of Shopping Centers (ICSC) annual convention (2005-2007) – hosted City of Milwaukee and other local officials, provided advice on developing a strategy for attracting new retailers, coordinated retailer meetings for local officials and staffed company booth on convention floor.
- Consultant to East Side Hoteliers, LLC and Ruvin Development Corporation, engaged to complete pro forma financial analysis for mixed-use projects located in Milwaukee, Wisconsin.
- Real estate consultant to City of Trotwood, advising the Dayton, Ohio suburb on redevelopment of Salem Mall into a new mixed-use town center, The Landmark – assisted in preliminary retail market study and completed site acquisition for new Wal-mart Supercenter.

THE ENDEAVOUR GROUP, Milwaukee, Wisconsin **2003-2004**
Real estate development and consulting company.

Vice President, Real Estate Development

Served as project manager overseeing retail development projects from concept through completion, including securing capital, lease negotiations, design review and approval, government entitlements and construction oversight. Worked as development consultant to Milwaukee non-profit organizations.

- Project manager for Riverworks Commons, a 21,500 square foot retail development located in Milwaukee, Wisconsin – developed project budget, completed financial analysis and loan application, managed government entitlement process, oversaw construction and negotiated leases with local and national tenants.
- Project manager for Wendy’s restaurant and adjacent retail development located in Milwaukee, Wisconsin – gained municipal approvals and oversaw construction.
- Project manager for Starbucks anchored retail center located in Milwaukee, Wisconsin – oversaw project design, government approvals, completed financial analysis and successfully negotiated lease with Starbucks as well as other local and national retail tenants.

WE ENERGIES, Milwaukee, Wisconsin**2001-2003***Electric and natural gas utility subsidiary of Wisconsin Energy Corporation, a Fortune 500 company.***Pricing/Financial Manager**

Managed all financial functions for new products and services being reviewed by company as well as for improvements to existing business units. Duties included cost-benefit and workflow analyses as well as price determination and complex modeling for revenues and profitability.

- Served on the development team for a portfolio of new power quality services and completed detailed financial analysis, pricing model and process manual that contributed to successful program launch.
- Served as financial consultant to Power Now, a business unit responsible for the sale and service of back-up generators – developed and helped execute a plan to improve financial viability of the company including workflow analysis that led to implementation of a job costing system.
- Completed pricing and financial recommendations for launch of new portable generator line being offered by Power Now business unit.
- Participated in cross-functional team exploring telecommunications business opportunities for We Energies and developing a comprehensive telecommunications strategy.

COHEN FINANCIAL, Madison, Wisconsin**1998-2001***A national real estate investment banking firm with approximately \$3.5 billion in annual transactions.***Vice President - Real Estate Investment Banker**

Responsible for establishing, developing and maintaining client relationships, which ultimately led to successful financing transactions. Duties included origination, analysis and placement of real estate mortgage loans and equity investments with correspondent lenders on behalf of clients.

- Established Cohen Financial's presence in Southeast Wisconsin – identified and contacted nearly 400 prospective customers during first year.
- Established and developed relationships with over four-dozen new clients. Generated nearly \$250,000 in fees completing \$30 million in financing transactions and assisted in an additional \$60 million in transactions.

WAUKESHA COUNTY ECONOMIC DEVELOPMENT CORPORATION (WCEDC)**1997-1998**

Pewaukee, Wisconsin

*Countywide economic development organization serving Wisconsin's third most populated county.***President**

Responsible for all aspects of corporation management including bookkeeping and production of monthly financial statements. Worked closely with real estate development community on proposed new commercial and residential developments. Assisted developers in gaining municipal approvals. Marketed and promoted Waukesha County to potential new businesses. Duties included administration of a \$2.6 million revolving loan fund. Responsible for origination, underwriting, closing and servicing of loans to growing Waukesha County companies. Also responsible for private sector fundraising efforts and representing Waukesha County in a seven-county Regional Economic Partnership to ensure the economic well being of Southeastern Wisconsin.

WISCONSIN HOUSING AND ECONOMIC DEVELOPMENT AUTHORITY (WHEDA)**1991-1997**

Madison, Wisconsin

*Quasi-public, statewide financial institution with over \$2 billion in assets and \$40 million in annual lending.***Director of Economic Development** (1992 to 1997)

As a member of senior management team, directed a staff of up to 17 responsible for the administration of agency's economic development programs. Worked closely with Wisconsin Department of Commerce to complete incentive packages for new and expanding Wisconsin businesses. Developed and maintained relationships with correspondent lenders who utilized WHEDA's loan guarantee programs. Performed feasibility and credit analysis of loan guarantee applications, approved loan guarantees within guidelines of WHEDA credit policy, managed Industrial Revenue Bond program and oversaw origination and servicing of \$50 million loan guarantee portfolio and WHEDA's venture capital program.

WISCONSIN HOUSING AND ECONOMIC DEVELOPMENT AUTHORITY (WHEDA), continued**Executive Assistant – Public Information Officer** (1991 to 1992)

Responsible for all aspects of media relations – publications, presentations, news releases, feature articles, media events and news conferences. Worked closely with internal Marketing Group on several targeted marketing campaigns throughout Wisconsin.

WISCONSIN STATE ASSEMBLY, Madison, Wisconsin **1985-1991**
State Representative, 83rd District (Parts of Waukesha, Walworth & Racine counties)

OFFICE OF U.S. CONGRESSMAN F. JAMES SENSENBRENNER, JR. **1982-1985**
 Brookfield, Wisconsin
District Office Staff Assistant

ADDITIONAL EXPERIENCE

CARDINAL STRITCH UNIVERSITY, College of Business and Management **1998-Present**
UNIVERSITY OF PHOENIX **2007-Present**

Milwaukee, Wisconsin

Adjunct Faculty Member

On a part-time basis, teach business finance and accounting courses for the college's B.A. and M.B.A. programs.

MID-AMERICA REAL ESTATE, Milwaukee, Wisconsin **2000**
Commercial Real Estate Broker and Retail Leasing Agent

LOUIS GRAL INVESTMENT REAL ESTATE, Milwaukee, Wisconsin **1986 to 1987**
Commercial Real Estate Broker

EDUCATION

University of Chicago, Booth School of Business, Chicago, Illinois **1997**
 Master of Business Administration, Concentration in Finance

Carthage College, Kenosha, Wisconsin **1982**
 Bachelor of Arts, Political Science

PROFESSIONAL DEVELOPMENT

Wisconsin Banker's Association **1993**
 Commercial Lending School, St. Norbert College, DePere, Wisconsin

National Development Council

Economic Development Finance Professional Certification courses, San Francisco, California

- Economic Development Finance **1997**
- Business Credit Analysis **1998**
- Real Estate Finance **1998**

International Council of Shopping Centers (ICSC), Member **2003-2007**

Licensed Wisconsin Real Estate Broker **1986-Present**