KURT W. OELERICH

Winnetka, Illinois

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Senior Financial Professional & Strategic Advisor

Results-driven financial executive and CPA advising founders, directors, and family-owned businesses across diverse industries. Builds scalable organizations, equipping leadership teams to make sound decisions. Guides cross-functional teams through high-stakes change, ownership transitions, and complex growth. Combines CEO-level perspective with rigorous financial expertise to improve profitability, organizational effectiveness, and resilience. Trusted for pragmatic judgment, collaborative partnerships, and people-centered leadership.

AREAS OF EXPERTISE

- Executive Leadership
- Strategic Finance
- Capital Allocation
- Board Leadership
- Growth Strategy
- Finance Transformation
- ERP Systems
- Financial Reporting
- Internal Controls
- Performance Analytics
- Investment Evaluation
- Acquisition Strategy
- Operational Strategy
- Cash Flow Planning
- M&A Integration
- Enterprise Value
- IPO Readiness
- Forecasting

Technology Expertise:

★ Microsoft Dynamics | ★ Deltek | ★ Vista | ★ QuickBooks Enterprise | ★ QuickBooks Online | ★ Power BI
★ Adaptive Planning | ★ Tableau | ★ Advanced Microsoft Excel

"Simply put, Eagle Test Systems could not have gone public without Kurt's drive and leadership. It was his expertise in every financial aspect of the IPO journey that allowed us to have a successful IPO."

Derek Abramovitch, COO, Eagle Test Systems

SELECTED CAREER HIGHLIGHTS

- ✓ **Expanded international revenue approximately 30% while improving profitability** through operational modernization and stronger cost controls.
- ✓ **Prepared Eagle Test Systems for a successful IPO** by building SEC reporting processes and strengthening internal controls.
- ✓ **Increased net income 50%** by strengthening financial planning, forecasting, and executive reporting.
- ✓ **Directed 200+ year-end closes and supported 70+ independent audits** across a broad portfolio of organizations.
- ✓ **Completed two public bond offerings and strengthened governance** while serving as Board Treasurer and CFO.

PROFESSIONAL EXPERIENCE

KOCONSULTING 1995 – Present

President, Principal Consultant

- Advise 125+ organizations across diverse industries on finance, operations, growth, and enterprise value creation.
- Designed SOX 404 frameworks adopted by six public companies.
- Led ERP and business intelligence implementations that strengthened financial reporting and performance visibility.

***Clients Include*:**

MANN'S BAIT COMPANY

Progressed through increasingly senior roles as CEO, COO, and CFO, partnering directly with ownership to improve profitability, modernize operations, expand internationally, and maximize shareholder value.

- Modernized executive reporting and forecasting, enabling faster, better-informed decisions.
- Improved manufacturing cost visibility and strengthened inventory controls.
- Positioned the company for a successful strategic sale.

PROFESSIONAL EXPERIENCE - Continued

ILLINOIS INTERNATIONAL PORT DISTRICT

Served for 27 years as Board Treasurer, CFO, and Interim CEO, providing financial stewardship and executive leadership.

- Strengthened governance and board reporting, improving transparency and oversight.
- Enhanced long-range capital planning to support sustainable growth.

QUANDEL CONSULTANTS

Served as CFO, leading financial planning, forecasting, budgeting, executive reporting, and organizational development.

- Led implementation and optimization of the Deltek ERP platform.
- Developed executive KPI dashboards that improved operational decision-making.
- Directed human resources, executive recruiting, and organizational development.
- Recommended, researched and implemented the Employee Stock Ownership Plan (ESOP).
- Improved executive visibility into project-level profitability.

EAGLE TEST SYSTEMS

Served as Strategic Advisor and Interim CFO, leading IPO-readiness initiatives and establishing SEC reporting processes.

- Strengthened financial reporting, internal controls, and IPO readiness.
- Coordinated external audit activities and related stakeholder requirements.

OPTION CARE HEALTH

Served as Strategic Advisor, supporting acquisition integration and implementing SOX compliance initiatives.

- Strengthened executive reporting and financial planning during acquisition integration.

REAL FOUR LLC

Served as Chief Executive Officer and Strategic Advisor, leading capital planning, investment analysis, asset management, and cash flow forecasting.

- Developed a financing strategy that improved investment evaluation and long-term capital planning.

ADDITIONAL EXECUTIVE LEADERSHIP

Served as Finance Transformation and Strategic Advisor to Maple Leaf Bakery, Sysix Technologies, Sonoma Partners, Jordan Industries, Sparkling Solutions, and Complete Home Services.

- Led finance transformation, ERP implementations, strategic planning, acquisitions, and organizational restructuring.

EDUCATION & CERTIFICATIONS

Bachelor of Science in Accounting, University of Dayton
Certified Public Accountant (CPA), Illinois (Inactive)

BOARD MEMBERSHIPS

Board Treasurer, Illinois International Port District | 27+ years
Board Advisor, Illinois Association of Free and Charitable Clinics
Co-Chair, Pediatric AIDS Fundraising Campaign, Children's Memorial Hospital
Board Member & Production Support, Winnetka Children's Theater
Board Advisor & Associate Producer, Trillium Lane
Crew Chief, Faith, Hope and Carpenters
Crew Chief, Rebuilding Together

INDUSTRY EXPERIENCE

Manufacturing | Consumer Products | Technology | Professional Services | Healthcare | Engineering | Construction
Government | Transportation & Logistics | Real Estate | Distribution | Nonprofit