

LORI D. JACKSON, CPA

6098 East Longview Drive □ East Lansing, Michigan 48823 □ (517) 974-1182 □ jacks450@msu.edu

EXECUTIVE SUMMARY

EDUCATOR | LEADER | ADVOCATE

An educator of university students who builds relationships between students, university, business entities, and the world while maintaining a solid focus of today's business environment.

AREAS OF EXPERTISE AND INTEREST

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|---------------------------|----------------------------|----------------------------|
| ▪ Auditing and Accounting | ▪ AI Classroom Integration | ▪ Creating Vision |
| ▪ Educating | ▪ Small Business Advocacy | ▪ Data Analytics |
| ▪ Relationship Building | ▪ Ethics | ▪ Risk Assessment |
| ▪ Establishing Trust | ▪ Needs Assessment | ▪ Stakeholder Advocacy |
| ▪ Strategic Thinking | ▪ Communicating | ▪ International Enrichment |
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PROFESSIONAL EXPERIENCE

MICHIGAN STATE UNIVERSITY – EAST LANSING, MI

INSTRUCTOR

JULY 2000 - PRESENT

Instruct and advocate for students as they become the future business leaders of our world. Prepare them for success in the workforce after graduation. Encourage knowledge of classroom material and emphasize the importance of global knowledge, awareness, and education.

- Instruct Auditing and Intermediate Accounting for both Accounting and Finance Majors.
- Instructed Accounting Principles II Managerial Accounting (large lecture). Manage 11-person Graduate and Undergraduate Assistant team.
- Instructed Education Abroad in Zurich, Switzerland. Created a relationship between Deloitte-Zurich, Deloitte- Detroit, and Eli Broad Accounting and Information System Department for education abroad.
- Instructed Special Topics in International Accounting and Finance for accounting and finance majors.
- Instructed Introduction to International Business for Eli Broad College of Business interns working abroad.
- Instructed Intermediate Accounting II, Principles of Accounting I and II, Survey of Accounting Concepts (large lecture), and Cost Accounting.
- Foster strong relationships with accounting firms to help students and our college maintain connections with current business leaders.
- Work one-on-one with students on academic and career planning to ensure success upon graduation.
- Develop new curriculum for current courses as well as develop new courses.
- Cultivate a strong culture of ethics within the classroom setting.
- Promote learning through experience-based instruction including data analytics and AI-first capabilities.
- Voluntarily mentor active PhD students within the department and recruit new potential talent as observed.

INVITED GUEST LECTURER

JUNE 2026 - PRESENT

Lecture for the nationally recognized, Michigan State University – Institute of Public Utilities (MSU IPU).

- Lecture Fundamentals of Utility Regulation – Flagship Program, Accounting and Ratemaking Course, and Advanced Regulatory Accounting and Auditing Course.
- Develop and deliver interactive instruction on accounting fundamentals for utility professionals, including engineers, operations managers, attorneys, economists, IT and HR professionals and other professionals with diverse backgrounds.

LORI D. JACKSON

- Translate financial reporting concepts into practical applications using real-world utility financial statements and business scenarios.
- Facilitate collaborative learning through AI-assisted financial analysis and breakout sessions that strengthen participants ability to interpret financial information and support organizational decision making.

LANSING COMMUNITY COLLEGE – LANSING, MI

AUGUST 1998 – May 2005

INSTRUCTOR (PART TIME)

Educated non-traditional college students and advocated for students, introducing them to highly advanced jobs from a community college level program. Taught both online and in person to facilitate learning for students who were managing busy careers and family life. Early adopter of online teaching strategies to best accommodate non-traditional college students.

- Instructed Auditing, Auditing Review Course, Accounting for Non-Business Majors, Accounting Principles I, and Intermediate Accounting I. Participated in syllabus review project for Auditing, Intermediate Accounting I, and Intermediate Accounting II.
- Facilitated job placement for students with local accounting firms and helped students receive scholarship funds.
- Empowered students to develop self-confidence and transition successfully into the workforce or advanced academic programs.
- Provided mentorship and academic support that encouraged students to believe in their abilities and pursue professional and educational advancement.

DAVENPORT UNIVERSITY – LANSING, MI

March 2002 – November 2005

INSTRUCTOR (PART TIME)

Educated non-traditional college students about key accounting and business concepts while helping them balance busy careers and family life. Early adopter of delivering high-quality learning in an online environment.

- Instructed Auditing, Accounting Issues and Research, Cost and Managerial Accounting, and Advance Accounting.
- Developed new and improved existing course curriculum.

BURCHAM HILLS RETIREMENT CENTER II – EAST LANSING, MI

March 1996 – June 1997

CONTROLLER

Performed all financial reporting responsibilities for Burcham Hills Retirement Center II while reporting directly to American Retirement Corporation (ARC), management company headquartered in Nashville, TN. Served as board liaison between audit committee and ARC. Lead regular audit committee meetings, facilitated financial discussion during monthly board meetings, and ensured that communications were clear and transparent.

- Prepared and reviewed monthly financial statements, coordinated and prepared the annual budget, supervised accounts payable, accounts receivable, and Medicare billing.
- Ensured that all departments followed proper corporate governance principles. Strengthened the existing internal control structure, coordinated year end budget process with all departments, participated in refinancing of bonds, lead audit committee meetings, worked monthly with the audit committee on special projects, and performed search for new audit firm.

MANER, COSTERISAN, & ELLIS, P.C. – LANSING, MI

August 1995 – March 1996

SENIOR AUDITOR

Lead audit teams and was responsible for the execution of engagement plans in a timely, efficient, and professional manner while maintaining and developing a strong working relationship with the client. Clients primarily included not-for-profit entities.

- Performed all aspects of financial statement audits to include the documentation and testing of internal controls, auditing in accordance with generally accepted auditing standards, and reporting in accordance with generally accepted accounting principles.

LORI D. JACKSON

- Evaluated systems, general controls, and the client's control environment to support that the balance sheet, income statement and statement of cash flows were fair and reasonably presented.

ERNST & YOUNG, LLP – ST. LOUIS, MO

January 1993 – June 1995

SENIOR AUDITOR

Responsible for the execution of engagement plans in a timely, efficient and professional manner while maintaining and developing a strong working relationship with the client. Clients primarily included SEC client-based industries such as financial institutions, telecommunications, and leasing technology.

- Performed all aspects of financial statement audits to include the documentation and testing of internal controls, auditing in accordance with generally accepted auditing standards, and reporting in accordance with generally accepted accounting principles.
 - Evaluated systems, general controls, and the client's control environment in an effort to support that the balance sheet, income statement and statement of cash flows were fair and reasonably presented.
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EDUCATION

MICHIGAN STATE UNIVERSITY – EAST LANSING, MI

MASTERS OF SCIENCE IN PROFESSIONAL ACCOUNTING

Completed course work in Accounting and Educational Administration with a cumulative GPA of 3.95. Graduate level credits earned, 24 and advanced graduate credits earned, six (6); for a total of 30 credits with 15 credits in Accounting and 15 credits in Educational Administration.

- Summa Cum Laude (3.95 GPA)
- Ernst & Young / Brink Scholarship Recipient
- ACC 814 Advanced Auditing
- ACC 821 Enterprise Information Systems
- ACC 837 Taxes and Managerial Decisions
- ACC 841 Strategic Management Accounting
- ACC 844 Planning and Control for Global Enterprise
- ACC 890 Independent Study
- EAD 861A Adult Learning
- EAD 861B Strategies for Teaching Adults
- EAD 862B Adult Career Development
- EAD 991B Special Topics in Higher, Adult, and Lifelong Education - I
- EAD 991B Special Topics in Higher, Adult, and Lifelong Education – II

SOUTHERN ILLINOIS UNIVERSITY – CARBONDALE, IL

BACHELOR OF SCIENCE IN ACCOUNTING

Completed course work in Accounting and business curriculum.

- Magna Cum Laude (3.82 GPA)
 - Southern Illinois University College of Business Outstanding Senior
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REFERENCES

PRIMARY REFERENCE

- Reitumetse Obakeng Mabokela, Vice Provost for Global Engagement and Professor in the Warner School of Education, University of Rochester

PROFESSIONAL AND INDUSTRY – PUBLIC ACCOUNTING

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| ▪ Dan Noel, Partner, Deloitte | ▪ Eric Waggoner, CEO, Waggoner Financial |
| ▪ Jared Puvalowski, Assurance Director, EY | ▪ Kiley Eory, President, Waggoner Financial |

ACADEMIC – PEER PERSPECTIVE

- Wayne Nesbit, PhD, Assist Professor, Michigan State University
- Natalie Vandepole, Director of Learning Technology & Development, Michigan State University
- Erik Nordman, Director, Institute of Public Utilities at Michigan State University
- Jon Anibal, Fixed Term Faculty, Michigan State University

ACADEMIC – STUDENT WORK PERSPECTIVE

- Tyler Lauer, Manager, EY
 - Mattie Thompson, Manager, Plante Moran
 - Mason Kottmeyer, Staff, Crowe
 - Aidan Collins, Staff Grant Thornton
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LEADERSHIP, HONORS, AND GOVERNANCE

CERTIFIED PUBLIC ACCOUNTANT – REGISTERED STATUS ACTIVE

- State of Michigan

INSTRUCTOR OF EXCELLENCE AWARD 2023

- Michigan State University Eli Broad College of Business ACC 411

INTERNATIONAL STUDY ABOARD INNOVATION AWARD RECIPIENT 2021

- Michigan State University Eli Broad College of Business

CPA EVOLUTION ACADEMIC ADVOCATE 2021

- American Institute of Certified Public Accountants and National Association of State Boards of Accountancy

DELOITTE AUDIT INNOVATION CASE COMPETITION ADVISOR

- Nationals 2020-2021
- Regionals 2019-2020
- Nationals 2018-2019

AUTHOR FOR ACCOUNTING MODULES – ACCOUNTING FOR FINANCE MAJORS 2020

- John Wiley & Sons, Inc.

SPARTAN HONOR – STUDENT VOTED; MOST CARE FOR STUDENTS ELI BROAD 2019

- Michigan State University Eli Broad College of Business

OUTSTANDING UNDERGRADUATE INSTRUCTOR OF THE YEAR 2007, 2010, AND 2018

- Michigan State University Eli Broad College of Business - Accounting and Information Systems Department

OUTSTANDING FACULTY SENIOR CLASS COUNCIL FIRST RUNNER UP 2009

- Michigan State University

BOARD OF DIRECTORS FINANCIAL LIAISON AND AUDIT COMMITTEE COORDINATOR 1996-1997

- Burcham Hills Retirement Center II

BETA ALPHA PSI HONORARY ACCOUNTING FRATERNITY – PRESIDENT 1992

- Southern Illinois University
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