Therefore we could not be more pleased to open the conference with a conversation to help understand what it means to put imagination to work. Our morning keynote connects Hal Gregersen, Executive Director of the MIT Leadership Center and Senior Lecturer in Leadership & Innovation at the MIT Sloan School of Management, and Jeffrey Bornstein, Senior Vice President and Chief Financial Officer, General Electric Company. GE today is a digital industrial company, connecting the physical and digital. Which means that for 120+ years, the company has continued to calibrate and recast to its customers’ needs. How do they do it? We’ll find out.

Our keynote panel, Run DMC: CFO Leadership in a Digital-Mobile-Connected World, includes CFOs from PayPal, UPS and Zillow. These companies wrote the book on connecting the digital and hard-asset worlds, with new ways of managing financial capabilities, enhancing offerings and marketing to customers. We look forward to hearing their wisdom and learning from their insights. Our breakout panels today are organized along two tracks – one track looks at the impact of connecting with people: how to maximize shareholder value, optimize employee relations and have a meaningful impact as a quiet leader. The other track offers perspectives on connecting with data: how to optimize software systems, minimize threats to data and navigate a continual budget cycle.

Our closing session brings together two companies, Blue Apron and RedFin, whose use of people and technology has led to considerable success. Moderator Lou Shipley, Lecturer at the Martin Trust Center for MIT Entrepreneurship, will lead the conversation, being quite familiar with the intersection of the CFO and the digital world.

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practically a year-round effort. This group of men and women who dedicate themselves to this effort are listed to the right. As you enjoy today’s Summit, please say hello.

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A great day is in front of us. Learn much, network well, and have fun!

JEREMY SEIDMAN
Co-Chair, MIT Sloan CFO Summit

JACK McCULLOUGH
Co-Chair, MIT Sloan CFO Summit

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7:30 AM – 8:15 AM
REGISTRATION & CONTINENTAL BREAKFAST
GRAND BALLROOM FOYER

8:15 AM – 8:45 AM
OPENING REMARKS
GRAND BALLROOM
JEREMY SEIDMAN
MBA ’03, Co-Chair, MIT Sloan CFO Summit

8:45 AM – 10:00 AM
COFFEE BREAK
GRAND BALLROOM FOYER

10:00 AM – 10:30 AM
TRACK I – CONNECTING WITH DATA
SOFTWARE SYSTEMS: RENEW OR REPLACE
GRAND BALLROOM

10:30 AM – 11:30 AM
LUNCHEON BUFFET
GRAND BALLROOM FOYER

11:30 AM – 12:00 PM
LUNCHEON KEYNOTE PANEL
RUN DMC: CFO LEADERSHIP IN A DIGITAL-MOBILE-CONNECTED WORLD
GRAND BALLROOM

12:00 PM – 1:15 PM
TRACK II – CONNECTING WITH PEOPLE
MAXIMIZING SHAREHOLDER VALUE
SALONS FGH

1:15 PM – 2:15 PM
WELCOME REMARKS AND MORNING FIRESIDE CHAT
GRAND BALLROOM
HAL GREGERSEN
Executive Director, MIT Leadership Center
JEFFREY BORNSTEIN
SVP & CFO, General Electric Company

2:15 PM – 3:15 PM
MORNING FIRESIDE CHAT
GRAND BALLROOM
HAL GREGERSEN
Executive Director, MIT Leadership Center
JEFFREY BORNSTEIN
SVP & CFO, General Electric Company

3:15 PM – 4:15 PM
TRACK I – CONNECTING WITH DATA
SOFTWARE SYSTEMS: RENEW OR REPLACE
GRAND BALLROOM

4:15 PM – 5:15 PM
TRACK II – CONNECTING WITH PEOPLE
MAXIMIZING SHAREHOLDER VALUE
SALONS FGH

5:15 PM – 6:15 PM
MORNING FIRESIDE CHAT
GRAND BALLROOM
HAL GREGERSEN
Executive Director, MIT Leadership Center
JEFFREY BORNSTEIN
SVP & CFO, General Electric Company

6:15 PM – 7:15 PM
LUNCHEON KEYNOTE PANEL
RUN DMC: CFO LEADERSHIP IN A DIGITAL-MOBILE-CONNECTED WORLD
GRAND BALLROOM

7:15 PM – 8:15 PM
DINNER RECEPTION
GRAND BALLROOM

8:15 PM – 9:15 PM
CLOSING REMARKS
GRAND BALLROOM
JEREMY SEIDMAN
MBA ’03, Co-Chair, MIT Sloan CFO Summit

9:15 PM – 10:15 PM
DEPARTURE
1:30 PM – 2:30 PM

TRACK I – CONNECTING WITH DATA

ANTICIPATING DISRUPTIONS: EXTERNAL AND INTERNAL THREATS TO DATA

GRAND BALLROOM

CHETAN GAVANKAR
Managing Director-Cyber, KPMG

ELIZABETH BOLAND
CFO, Bright Horizons Family Solutions

CHRISTOPHER DUNLEAVY
Senior VP & CFO, Brigham and Women’s Hospital

MICHAEL ELLIS
CFO, Flywire

JOSH SIEGEL
CFO, CyberArk

2:30 PM – 3:30 PM

NAVIGATING THE CONTINUAL BUDGET AND PLANNING CYCLE

GRAND BALLROOM

MICHAEL PARK
Senior Partner, McKinsey & Company

BOB BERDELLE
Executive VP & CFO, United Way Worldwide

THOMAS FISHER
Partner, Strategy & Analytics Center of Competence Finance Transformation, IBM Global Services

ERIC SHAFF
Executive VP & CFO, Seres Therapeutics, Inc.

ERIC SOCKOL
CFO & Treasurer, Bigbelly Solar

3:30 PM – 4:00 PM

COFFEE BREAK

GRAND BALLROOM FOYER

4:00 PM – 5:00 PM

AFTERNOON KEYNOTE

GRAND BALLROOM

LOU SHIPLEY
Lecturer, Martin Trust Center for MIT Entrepreneurship, MIT Sloan

BRAD DICKERSON
CFO, Blue Apron

CHRIS NIELSEN
MBA ’96, CFO, Redfin

5:00 PM – 6:15 PM

TRACK II – CONNECTING WITH PEOPLE

TALENT MANAGEMENT: HOW TO ATTRACT, RETAIN & OPTIMIZE EMPLOYEE RELATIONS

SALONS FGH

BILL DRISCOLL
President, New England District, Robert Half International, Inc.

KEN BETTENHAUSER
President, HR Knowledge

STEPHEN GREGORIO
Executive VP & CFO, Black Duck Software

LORENCE KIM
CFO, Moderna Therapeutics

JANICE O’REILLY
CFO & Treasurer, TechTarget, Inc.

6:00 PM – 7:30 PM

NETWORKING RECEPTION

GRAND BALLROOM FOYER

RUTH SILMAN
Office Managing Partner, Nixon Peabody LLP

LINDA BAIN
CFO, Codiak BioSciences

SACH BAROT
CFO, Global Operations, Partnerships and Strategic Planning, Dun & Bradstreet Corp

VINAY MEHRA
CFO, Politico

JOHN VAN MAANEN
Erwin H. Schell Professor of Management & a Professor of Organization Studies, MIT Sloan

#MITCFO
Jeremy is a Managing Director at UBS Financial Services, and joined UBS in 2015 after 10 years at Credit Suisse Private Bank, where he also served on Credit Suisse’s Advisory Council, a 14-person leadership team in the Private Bank.

Jeremy graduated cum laude from the University of Pennsylvania, and holds an MBA from the MIT Sloan School of Management with a focus in Financial Management. In 2003, Jeremy founded the MIT Sloan CFO Summit (www.mitcfo.com), the premier forum for corporate finance executives, and continues to serve as chairperson. Jeremy is frequently contacted by members of the media for his insights into business and strategic issues facing the CFO, and has been quoted by Bloomberg, Wall Street Journal, and Boston Business Journal. Jeremy currently serves on the advisory boards for WGBH, Coaching4Change, and MIT Sloan Boston Alumni Association. Jeremy, his wife, son, and daughter live in Wellesley, and enjoy skiing as often as possible at Loon Mountain in NH.
Jeffrey is currently Senior Vice President and Chief Financial Officer for GE Company. Prior to his current role Jeffrey served as Chief Financial Officer of GE Capital and Senior Vice President of GE Company.

Jeffrey joined GE in 1989 with the GE Power Systems’ Financial Management Program. In 1992, he joined the GE Corporate Audit Staff and then became Executive Audit Manager. In 1996, he was named Chief Financial Officer for GE Aircraft Engine Services and Vice President in 1998. In 1999, he was promoted to Chief Financial Officer of GE Plastics and served as their CFO until 2002.

Jeffrey is on the board of Northeastern University and buildOn. He has also been involved in a number of youth programs. He received his B.S. in Business Administration from Northeastern University.

Hal is Executive Director of the MIT Leadership Center and a Senior Lecturer in Leadership and Innovation at MIT Sloan. He is a Senior Fellow at Innosight and a former advisory board member at Pharmascience, a privately held pharmaceutical company based in Montreal, Canada. Before joining MIT, he taught at INSEAD, London Business School, Tuck School of Business at Dartmouth College, Brigham Young University, and in Finland as a Fulbright Fellow.

Hal’s most recent book, The Innovator’s DNA: Mastering the Five Skills of Disruptive Innovators, flows from a path-breaking international research project (with Jeff Dyer & Clayton Christensen). They explored where disruptive innovations come from by interviewing founder entrepreneurs and CEOs at 100+ of the most innovative companies in the world and by assessing how 8,000+ leaders leverage five key innovation skills to create valuable new products, services, processes, and businesses. To grasp how leaders find and ask the right questions, Hal is now studying 100+ renowned business and government leaders. This project is surfacing insights into how leaders build better questions to unlock game-changing solutions.

Hal has co-authored ten books and published over 50 articles, book chapters, and cases on leading innovation and change. His research has been highlighted in global media such as BBC, CNN, The Economist, Fast Company, The Wall Street Journal and several more.

Putting his research to practice, Hal regularly delivers high impact keynote speeches and executive workshops with companies like Accenture, Adidas, AT&T, IBM, Intel, Johnson & Johnson, LG, Lilly, McAfee, SAP, Vivendi, and many more. He also works with governments, not-for-profit and NGO organizations to generate greater innovation capabilities in the next generation of leaders.
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Ryan most recently has served as Senior Vice President and Chief Accounting Officer at CYS Investments, Inc., a NYSE-listed real estate investment trust (REIT) and mortgage-backed securities asset manager, from 2014 to 2015, where he was responsible for financial accounting, financial and SEC reporting, accounting policy and management reporting and financial analysis. Ryan served as a Chief Financial Officer consultant for several clients between 2012 and 2014. Previously, he served as Managing Director and Chief Accounting Officer at First Marblehead Corporation, a financial services company specializing in student loan origination and securitization services, from 2011 to 2012. Ryan also spent four years at Freddie Mac, a real estate mortgage and securities asset manager, where he served as Controller – Multifamily Accounting from 2009 to 2011 and Controller – Investments and Capital Markets Accounting from 2007 to 2009. He has also held senior-level finance positions at organizations including Booz Allen Hamilton, Protiviti, Inc., InterSystems Corporation and NerveWire, Inc.

Ryan holds a J.D. from Georgetown University, a Masters in Accountancy from George Washington University, an M.S. in Public Policy and Administration from the London School of Economics and an A.B. (cum laude) in Government from Bowdoin College. Ryan is also a licensed CPA in the District of Columbia.

Randy is Vice President Global Line of Business Finance. The LoB Finance organization is responsible for the full suite of SAP solutions for the Office of the CFO. SAP has the market’s most robust portfolio of solutions for finance professionals, covering all major financial processes.

Randy has held several roles at SAP for the past 10 years, most recently in leadership roles within SAP’s Services business. In these roles, he led both large and small teams focused on Analytics Strategy, Data Strategy, Business Transformation, Big Data, EPM, GRC, BW/BOBJ services focused on the implementation, adoption and value realization of SAP’s products. Additionally, he previously held key leadership roles in Value Engineering (VE), Business Transformation Services (BTS), Business Analytics Services (BAS), and Big Data and Cloud Analytics (BCA).

Over the past 30 years of combined Finance and IT experience, Randy consistently delivered innovation and measurable business value working with C-Level management for Global Fortune 500 companies. Randy was the Global Finance and BI Lead for Johnson & Johnson’s Consumer Sector, and has previously also held roles in Public Accounting, Treasury, Finance Operations, Audit, Business Intelligence, Value Management, IT Strategy Development and Implementation, and Program Management.

Randy is a Certified Public Accountant, Certified Management Accountant, Chartered Global Management Accountant and a member of the AICPA and the Institute of Management Accountants.

Randy is married with five children ranging in age from 30 to 6 yrs. old. Personal interests include: Golf, Hot Air Ballooning, anything the kids do.
**Sean Quinn**
*Executive VP & CFO at Cimpress*

Sean oversees Cimpress’ worldwide finance operation, which includes the company’s accounting and control, financial planning and analysis, investor relations, tax, treasury and internal audit functions, and has responsibility for Corporate IT and Corporate HR. He first joined Cimpress in 2009 and played an integral role in external reporting and accounting, prior to becoming global controller and chief accounting officer. During his time as chief accounting officer, Sean created a world-class controllership and reporting organization while also supporting significant investment decisions and acquisition activity.

Prior to joining Cimpress, Sean was a certified public accountant at KPMG, working in the Philadelphia, London and Boston offices. He holds a B.S. in Accounting from Saint Joseph’s University.

**Milo Sprague**
*CTO, Silicon Valley Bank*

As CTO, Milo has responsibility for the Silicon Valley Bank’s (SVB) overarching business and IT technology strategy, reporting to the CIO. His role includes overarching responsibility for global enterprise and solution architecture, integration and SOA services, technology research and development (R&D) and technology innovation. Milo works closely with many SVB clients and looks to identify synergy opportunities for technical collaboration both with the bank and between clients where appropriate.

Prior to SVB, as a Managing Principal in Capco’s Technology Practice, Milo led consulting engagements for enterprise infrastructure architecture, Cloud Computing strategy, IT organizational design, and CIO advisory services across the Financial Services industry. He also led ITIL and IT service management process improvement and implementation.

Milo holds an A.B., cum laude, from Harvard College and the Harvard Kennedy School of Government in the area of “International Relations and Technology.”

**Leslie Owens**
*Executive Director, MIT Sloan Center for Information Systems Research*

Leslie joined the MIT Sloan School of Management in 2015 as a senior lecturer and executive director of MIT CISR. She oversees CISR’s operations and is responsible for optimizing the impact of CISR research findings with academics, executives, and the general public. She also serves as a faculty mentor for a Sloan Action Learning course on enterprise transformation.

Leslie has worked in business technology for over twenty years as a practitioner, research analyst, and consultant. Before MIT CISR, she was a vice president and research director at Forrester Research where she managed a team of analysts and was responsible for leading research projects, delivering research and consulting services to clients, and speaking at major industry events.
Maximizing Shareholder Value

Ingrid is a senior finance executive with more than two decades of experience in various financial and operational roles. He has worked for public, private and private equity backed companies ranging in size from $50M to $23B. He has worked and lived internationally in Sweden, Germany, England, Switzerland, Hong Kong and the US and has handled business transactions in more than 30 countries.

Currently, Ingrid is the Global Chief Financial Officer for Educatius International and President of its North American business. Educatius is an international education exchange program provider that supports students worldwide for high school and college exchange programs. Prior to this role, Ingrid was the CFO (Sweden) for ManpowerGroup, one of the largest global staffing solutions companies.

Before Manpower, Ingrid was the CFO and SVP for Global Partnerships for Laureate Education, working in the US, Switzerland and Hong Kong. Laureate is the largest global network of for profit universities. Ingrid’s in depth experience and expertise includes M&A and Integration, managing high growth situations, improving efficiency and driving synergies, streamlining business operations and effectively dealing with multilingual and multi cultural teams that are geographically dispersed.

Ingrid is a native Swede, who earned a BA in Finance and Accounting from Gothenburg School of Economics and an MSc in International Finance and Accounting from London School of Economics.

Ingrid is an avid golfer, skier and fan of ice hockey. He lives in the Greater Boston area with his wife and two teenage sons.

As Chief Financial Officer of Care.com, the world’s largest online marketplace for finding and managing family care, Michael is the Company’s lead executive with the financial community including investors, analysts and banks, and helps evaluate growth opportunities and M&A targets for the Company. In addition, he oversees Care.com’s finance function, including accounting, planning, forecasting, tax, treasury and compliance.

Michael joined Care.com in April 2015 from Weight Watchers International Inc. where he served since 2013 as Chief Strategy Officer for the global publicly traded company. In that role, he oversaw all mergers and acquisitions and franchise relationships and drove FP&A and long-range planning initiatives. In 2004, he joined WeightWatchers.com, then a separate company, as its Vice President of Strategy. After helping consummate the transactions that brought WeightWatchers.com and Weight Watchers International together, he held several senior management roles in the combined entity.

Michael began his career as a management consultant, first at Dean & Company and then at McKinsey & Company as part of its Corporate Finance & Strategy practice. In between, he served as Head of Strategy for ParentWatch, Inc. He received an A.B., summa cum laude from Harvard University, where he was elected to Phi Beta Kappa, and an MBA with distinction from Harvard Business School.
Valen has been Chief Financial Officer at Brookstone – one of the largest US specialty retailers with a 50-year heritage selling innovative and smart products for two years. She was appointed as Board of Director in May 2016. Her primary responsibilities include corporate strategy, big data business intelligence/analytics, operation planning, real estate, and finance & accounting (treasury, accounting, tax, audit & compliance). She is tasked with increasing profitability and expanding the business internationally. Valen is fortunate to have spent her career in both public and private companies in a wide range of business sectors (CPG, manufacturing, stores, eCommerce, b2b & b2c). She has worked in four countries (US, Australia, Singapore, China) over the past 16 years, and has a genuine passion for breakthrough technologies and innovative business models that make a real difference for businesses and consumers around the world.

Valen is also actively involved in the business community. She has helped chair the Strategy Planning Innovation Summit in Boston and recently attended the Yale University China-US Forum as a speaker, just to name a few.

Jason has been the Chief Financial Officer at CarGurus LLC since September 2015. Prior to joining CarGurus, he joined Polaris Partners in June 2003 as an Associate and worked his way up to a Principal and General Partner. Prior to Polaris Partners, he held various management roles in Analytics and Client Services such as Director of Analytics at Microsoft Advertising (formerly, aQuative), where he contributed to the development of the Atlas software suite, developed and sold data-driven customer segmentation analyses, and managed several client relationships in industries including pharmaceuticals, media and entertainment, financial services, and consumer products. Earlier in his career, during his tenure at Bain and Company, he served as a Senior Associate Consultant, where he focused on M & A strategy consulting to clients including private equity firms and Fortune 500 companies in the media, information technology, financial services, and consumer products sectors. He serves as a Board Observer of Cushcraft Corporation and The HealthCentral Network. He has been a Director of The Roberts Group Limited since April 3, 2014. He serves as a Director of LifeLine Screening of America, Ltd.; TRGRP, Inc.; Gumhouse, Inc.; and PartsSource, Inc. He served as a Director of LegalZoom.com, Inc. since February 2007. He served as a Director at ShoeDazzle, and SnapCloud. Jason has extensive background working with consumer technology and Internet companies. Jason received an MBA, with distinction, from the Tuck School of Business at Dartmouth University, where he was recognized as an Edward Tuck Scholar. He also holds an A.B., cum laude, in English from the Duke University.

Zach joined UBS in 2016 to lead the firm’s global investment banking coverage efforts in the Internet & Digital Media sector. He previously held similar positions at Stifel / Thomas Weisel Partners, Credit Suisse and Deutsche Bank / Alex. Brown & Sons. Zach has more than 20 years of experience as an investment banker in the Technology and broader TMT sectors. He has advised a broad range of clients on strategic and capital markets transactions.

Zach earned his MBA from Stanford University, where he was an Arjay Miller Scholar, and his BS from Stanford University, where he was elected to Phi Beta Kappa.
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Jack Gaziano, Managing Director
T 617.630.4170
gaziano@svb.com

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Newton, MA 02466
Long-term success in business has always been about more than just who you know and what you do. It is dependent on what you do with your customers, prospects, suppliers and partners to help them succeed.

Relationships are the longest-standing, most proprietary differentiator for any company. They were central to the very beginnings of commerce and even civilization at large, as financial contracts are as old as written language. Technology can be replaced, people can change jobs and products can become obsolete. In the end, the most successful companies are those that value relationships above all else.

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Innovative CFOs are helping their companies use technology to serve customers in new and exciting ways. As businesses embed mobile and digital connections, CFOs are hard at work rationalizing decisions and allocating resources. What are their lessons learned along the way and where are the opportunities ahead? Join our panel of CFO leaders in a discussion on how they are enhancing offerings, marketing to customers and managing financial capabilities.

Peter leads the team of professionals who partner with clients and faculty at the MIT Sloan School of Management to develop, design, and deliver innovative executive education programs for individuals and companies.

Formerly CEO of the commercialization, consulting, and executive education business of the London School of Economics, he has over twenty years of experience in international strategy, technology consulting and organizational development. Peter has also served as a director and board adviser to businesses and non-profit organizations on three continents. He is a past president of the British American Business Council of New England, for which he currently serves as a board director, and a founding member of its Energy and Environment and High Tech Committees. Peter is a trustee and treasurer of the American Foundation of the University of St Andrews in Scotland and co-chair of the Education Working Group of the Internet of Things World Forum and a founding member of the Internet of Things Global Talent Consortium. He is also a board director and co-chair of the Digital Communications Subcommittee of UNICON, the global association of university-based executive education programs.

Peter earned a PhD from the University of St Andrews, Scotland, for research in plasma physics and microwave engineering. After a period of academic entrepreneurship in a variety of related fields, including optoelectronics, neural network computing, and the interfaces between technology and terrorism, he was appointed Westminster Fellow in the UK Parliamentary Office of Science and Technology, where he advised MPs and Peers of all parties on policy issues in the physical sciences, defense, and IT.

In 2012, Peter was named a Member of the Most Excellent Order of the British Empire (MBE) by Queen Elizabeth II in recognition of his service to British and American business and academia interests.

As Chief Financial Officer, Richard is responsible for accounting, finance, financial planning, taxes and treasury, as well as audit and compliance activities at UPS. As a member of the UPS Management Committee, he joins the company’s most senior executives in setting strategy for long-term growth. Prior to being named CFO, he was Corporate Controller and Treasurer. In that role, he was in charge of financial reports and plans, tax, general accounting and mergers and acquisitions across all UPS business units.

Richard has overseen the acquisitions of healthcare companies Polar Speed, Poltraf, Cemelog and Pieffe Group. He helped strengthen UPS’s business-to-consumer portfolio with the acquisitions of iParcel and Kiala. Richard also helped expand the company’s international small package footprint in Turkey, Slovenia, Romania, South Korea, Vietnam and Costa Rica.

Richard joined UPS Customer Service in 1981 while attending college. His UPS career has included financial operating assignments and corporate functional roles in finance, accounting and business development. In 1989, he was promoted to district controller in the Americas Region as part of the development team for Mexico and Latin America. In 2003, Richard became International Chief Financial Officer and helped to grow profits while opening UPS operations in China and expanding in Poland, Japan and the United Kingdom.

Richard holds a bachelor’s degree in business administration from University of Texas San Antonio and a master’s degree in business administration from the Goizueta Business School at Emory University.
As Chief Financial Officer, Kathleen oversees finance, treasury and accounting, as well as legal operations and corporate development for Zillow Group and its portfolio of brands.

Kathleen joined Zillow in 2010 as General Counsel, and served as CFO from 2013 to 2015. She has played a pivotal role in all of Zillow’s key corporate finance initiatives including Zillow’s 2011 initial public offering, two follow-on equity offerings, and all 11 of the company’s acquisitions, including Trulia, StreetEasy and HotPads. As COO, she ran mergers and acquisitions, corporate development, human resources, legal and customer support.

Kathleen has received numerous awards including: Puget Sound Business Journal’s 2012 Outstanding Corporate Counsel of the Year, Seattle Business Magazine’s 2013 General Counsel of the Year, San Francisco Business Times’ 2013 Corporate Counsel of the Year finalist, and honoree in San Francisco Business Times’ Most Influential Women in Bay Area Business 2014.

Before joining Zillow, Kathleen served as General Counsel of Hotwire, StubHub, Flip Video camera maker Pure Digital Technologies, and FanSnap.

Kathleen received her juris doctor with honors from University of Chicago Law School, and received her bachelor’s degree with distinction from the University of California, Berkeley. She currently serves on the Visiting Committee of the University of Chicago Law School.

John joined PayPal in 2015 as Chief Financial Officer overseeing PayPal’s financial stability and growth. As part of the management team, John leads PayPal’s financial operations, regional finance teams and investor relations. He brings more than 20 years of financial management experience.

Prior to PayPal, John was a customer advocate and led the most profitable era in the company’s history as Executive Vice President and CFO at United Continental Holdings, Inc.’s United Airlines. In this role John was responsible for the company’s overall financial strategy and corporate strategy function overseeing corporate finance, treasury, financial planning and analysis, tax, accounting, investor relations, strategic planning and risk management. He began his professional career at Ernst & Young LLP in Houston.

John was an inaugural member of the CNBC Global CFO Council, an elite group of chief financial officers representing public and private companies from various major sectors, to share their frontline insights and unique views on key issues and challenges facing today’s CFOs. As a leader on the March of Dimes national board of trustees, he was named the 2015 national chair of the March for Babies – the nation’s biggest fundraiser for mom and baby health.

John earned his bachelor’s and master’s degrees in business administration from Baylor University. He is a Certified Public Accountant.

Kathleen Philips
CFO, Zillow

John Rainey
Senior VP & CFO, PayPal

Kimberly Johnson
Editor, CFO Journal
ELIZABETH BOLAND
CFO, Bright Horizons Family Solutions

Elizabeth joined Bright Horizons in 1997 as Chief Financial Officer. Bright Horizons serves more than 1,000 employers, delivering high-quality child care and early education in more than 930 centers in the US and Europe, as well as back-up child care and elder care services, and educational assistance and counseling services. She led the Company’s IPO in late 1997, and has managed the finance function through nearly 20 years of consistent growth and service innovation.

During her tenure, Bright Horizons has expanded internationally and now operates in six countries, partnering with employers and their employees to address the challenges and stresses for working parents. The Company went private through a private equity sponsored LBO in 2008 and returned to the public markets in 2013, when Elizabeth led the company’s second IPO transaction. Her other professional experience includes financial and administrative leadership roles at a non-profit television production company and a publicly traded provider of home-health care and temporary staffing services. She started her career on the audit staff at Price Waterhouse, LLP in Boston, completing her tenure as a senior audit manager.

CHRISTOPHER DUNLEAVY
Senior VP & CFO at Brigham and Women’s Hospital

Christopher is the Chief Financial Officer at Brigham and Women’s Health Care (BWHC). He started on May 2, 2016 as the new Senior Vice President of Finance and CFO.

With more than 26 years of experience in financial management and strategic planning for health care, public accounting and service industries, Christopher joined BWHC after serving as a group Senior Vice President and CFO at Vizient, Inc. Prior to Vizient, he was the Executive Vice President and CFO for USMD Holdings, Inc., (NASDAQ-USMD) which includes the USMD Health System, serving the Dallas-Fort Worth metro area with two hospitals, four cancer centers and more than 60 primary and specialty care clinics. He has also served as CFO for Baylor Heart and Vascular Hospital.

Christopher earned his executive MBA from Baylor University and his BBA in Finance from the University of Texas at Arlington. He is also a CPA.

What is the greatest threat to data security? It can’t just be the employee who stores his password under the keyboard! The true internal threats include data that is mis-entered, misappropriated, misinterpreted or misused. External threats show up on the front page of the newspaper, and include data that is hacked, publicly proclaimed or privately appropriated. CFOs are often on the frontline as their systems connect across departments and link across functions. Tap into the expertise of our panel as they offer insight into busting the ghost that lurk in the wires.
Michael joined Flywire as its Chief Financial Officer in April 2015. Flywire, headquartered in Boston, is a leading provider of high-ticket payment solutions, connecting educational and healthcare institutions with consumers on six continents. Introduced five years ago as a way for international students to pay their tuition for studies abroad, Flywire is now used by over 1,000 colleges and universities around the world and hospitals in North America. The company has processed billions in payments from 220 countries and territories, in 70 local currencies. Michael brings over 25 years of experience providing financial and operational leadership for both private and public companies. Michael leads the accounting, payment operations, customer service and administrative teams as CFO of Flywire.

Prior to Flywire, Michael was the CFO at CashStar, a leading provider of digital gifting solutions for retailers, from 2009 to 2015. During his leadership, CashStar raised over $50 million in financing through equity and debt offerings to support its tremendous growth in revenue and employees. He oversaw multiple functions including finance, risk and settlement operations, legal, and human resources during this time as CFO at CashStar. Prior to joining CashStar, Michael was the CFO of Eze Castle Software, and held positions at the Massachusetts Port Authority, Ariba and PricewaterhouseCoopers.

Michael received a Bachelor of Arts degree in Accounting and Political Science from Ohio Wesleyan University.

Josh is Chief Financial Officer of CyberArk (NASDAQ: CYBR). With more than 20 years of financial experience in both public and private global organizations, he has led company public and private offerings, capital restructurings and varied commercial transactions across hi-tech and the financial sectors. Prior to CyberArk, Josh served as CFO for Voltaire Ltd. (NASDAQ: VOLT), a leading provider of InfiniBand and Ethernet connectivity solutions. In this position, in addition to running the finance legal department he executed the company’s initial public offering, managed investor relations, and the company’s eventual merger agreement with Mellanox Technologies (NASDAQ: MLNX).

Prior to joining Voltaire, Josh served in several senior financial management positions at companies including Lucent Technologies Ltd (formerly Lannet Ltd.) and SLM Corporation. He holds an A.B. in Economics and an MBA with a concentration in Finance, from the University of Michigan in Ann Arbor.
Recruiting has never been easy, and with the ever-increasing ways in which candidates can be engaged, the task can seem overwhelming. Then there’s the question of ensuring your current employees are optimized once hired, and retained once at full speed. Today’s digital ecosystem can accelerate good and bad impacts – reassure employee contentment or aggravate restlessness. Our speakers will review their strategies, both high tech and high touch, for managing financial talent.

Ken has over 25 years of experience in human resources, benefits administration, payroll, and HR technology. Since co-founding HR Knowledge in 2001, Ken has led the company’s Benefit Brokerage Division, where he works with clients to develop strategies that significantly reduce corporate expenditures involving payroll and employee benefit costs. Ken also directs HR Knowledge’s ADP Consulting Practice, assisting ADP clients with implementation, support, training, and ongoing managed services.

In addition to working with commercial companies, Ken leads HR Knowledge’s Education Division, which is dedicated to supporting independent schools, charter schools and charter management organizations in the areas of HR, benefits, benefit administration, payroll and retirement plan administration. Through the HR Knowledge platform of integrated services, Ken’s efforts enable schools to focus more time on students and curriculum, while ensuring the school’s back-office operations are compliant and are offering the best employee benefits at the lowest possible cost.

Prior to HR Knowledge, Ken spent over 10 years in the benefit, payroll and HR technology fields. Ken was the Director of Sales for ADP’s Emerging Business Division in New England. He continued his outsourcing experience at ONEWORLD Software Solutions, a software development company. Before that, Ken served as an Application Sales Manager at Oracle Corporation.

Stephen brings over 25 years of financial management experience at high tech companies to his role as Chief Financial Officer and Executive Vice President at Black Duck. He has taken a company through a successful IPO, handled M&A transactions on both sides, raised both debt and equity capital, handled several complicated recapitalizations, and acted as general counsel for many companies including negotiating customer agreements, as well as partnership and channel agreements.

Stephen has also been involved in either running human resource groups or has been directly involved with human resources as it comes to staffing, compensation, stock option incentives, firings, various employment matters, and all things benefits related.

Previously, he was Senior Vice President and CFO of Verdasys, Inc., where he was responsible for all the financial and administrative operations of the company. Prior to joining Verdasys, Stephen was the CFO at other companies including: Interwise (acquired by AT&T) Corporation, Excelergy Corporation, Vality Technology (acquired by Ascential Technology), and Gensym Corporation (GNSM). He began his career with Arthur Andersen & Company.

Stephen earned his Bachelor of Science degree with High Honors from Bentley College and is a Certified Public Accountant.
Janice has served as Chief Financial Officer and Treasurer for TechTarget since 2012. TechTarget (NASDAQ: TTGT), a digital business-to-business media company, is the leading destination for serious technology buyers researching and making enterprise technology decisions. In this role, Janice has overall leadership responsibility for the strategy, operations and compliance of all of the Company’s finance, treasury, investor relations and control functions.

Janice has over 30 years of financial and business management experience. At the start of her career, she was an audit manager for Deloitte, which she left to become Treasurer of a start-up organization. She then became CFO of The Harder Group, a venture capital group specializing in credit and collection related companies. She was appointed CFO and later President of one of its portfolio companies. After a successful sale of the portfolio company, Janice became a Director in the Emerging Business practice for Accounting Management Solutions, Inc., a provider of outsourced financial and accounting services. Most recently, Janice was a partner with TechCXO, a consulting firm that provides financial, operational and executive services to technology, multi-media and software companies.

Janice earned a B.S. degree in Accountancy from Bentley University and is a licensed certified public accountant.

Lorence is a Chief Financial Officer at Moderna Therapeutics. He joined Moderna from Goldman Sachs where he was a managing director and co-head of the U.S. biotechnology investment banking effort. He joined Goldman Sachs in 1999 as a summer associate, and was named managing director in 2008. As a member of the Healthcare Investment Banking Group for nearly 14 years, Lorence's responsibilities included corporate finance and M&A for the pharmaceutical and biotechnology industries, with several billion in equity and equity-linked financings, and more than $55 billion in M&A transactions.

Prior to joining Goldman Sachs, Lorence worked in various medical research and consulting positions concurrent with his graduate studies. Lorence graduated from Harvard University, magna cum laude and Phi Beta Kappa with an AB in Biochemical Sciences in 1995. He also earned an MBA in Healthcare Management as a Palmer Scholar from the Wharton School of the University of Pennsylvania in 2000, and an M.D. from the University of Pennsylvania’s School of Medicine in 2000.

Bill is the New England District President and is based in Robert Half’s Boston office. He oversees professional staffing services for RHI’s 23 offices throughout Massachusetts, New Hampshire, Maine, Connecticut, Rhode Island and Upstate New York. Bill began his career with the company in 1992 in the Boston office where he consistently ranked among RHI’s top 10 salespeople worldwide. Promoted to Area Manager in 1996, he transferred to Atlanta and soon increased RHI’s presence in Georgia from one office to seven statewide. He then became a Regional Manager in 1998 and only three years later took on the highly visible role of District President over all of the company’s operations in North and South Carolina, Georgia and Jacksonville, Fla. He returned to Boston as New England District President in January of 2006.

Bill serves as a national spokesperson for Robert Half and has been featured in several top publications, including the Wall Street Journal and the Boston Globe. He has also made appearances on local and national networks, including WFXT, WBZ, WCVB, NECN, PBS, and Fox Business News. Bill is considered a local expert on the staffing industry, commenting on recruiting practices, hiring trends, and other workplace issues.

A graduate of Middlebury College in Vermont, Driscoll holds bachelor’s degrees in History and Spanish. Bill, his wife Laurel and their three children reside in Lexington, MA.
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Bob is responsible for the financial strategic leadership of United Way Worldwide, by ensuring sound fiscal management of the organization, as well as advising senior management and the Board of Trustees on plans to achieve its goals and objectives through a multi-year business plan. In addition, he is responsible for risk management, information technology, facilities management and vendor licensing.

Prior to joining United Way Worldwide (formerly United Way of America), he was Chief Operating Officer of United Way of Metropolitan Chicago (UWMC). Under his leadership UWMC substantially improved its community investment and streamlined its structure. He led the merger and integration of United Way in Chicago with United Way of Suburban Chicago to form the new United Way of Metropolitan Chicago, which resulted in a 25% reduction in operating costs.

Bob worked for Commonwealth Edison, a subsidiary of Exelon Corporation (the leading electricity company in the United States) for 26 years prior to working at UWMC. He held several key positions in the company, such as Chief Financial Officer, Vice President Tax, Comptroller, Manager of Financial Reporting, Director of Strategic Analysis and Assistant Treasurer.

Bob received his Bachelor’s Degree in Finance from University of Notre Dame and attended DePaul University Masters of Accounting Program. He is also a Certified Public Account in Illinois. Bob was previously a board member with United Way of America and United Way of Illinois, and served on the Audit Committee of United Way in Chicago.

Tom is an IBM Thought Leader on the topic of finance transformation. He leads and manages sales and delivery of CFO strategic finance transformation improvements, including hypothesis-driven assessment, shared services, Finance and Accounting outsourcing, process re-engineering, organization/target operating model design, business case development and benchmarking.

For over 20 years, Tom has worked with many of the world’s leading organizations to develop a practical and actionable transformation strategy for improving Finance function performance – including baseline assessment, process designs, service delivery strategies (SSC, Outsourcing, etc) and technology enablement (ERP, EPM, analytics). He has lectured and published on Finance Function Transformation. Tom’s approach to serving clients is grounded by practical experience as a finance executive and advisor across the commercial, financial services and not-for-profit sectors- guided by an understanding of the complex inter-dependencies among people, organizational culture, enabling technologies and business requirements.

Tom holds a Bachelor of Arts degree in economics from Colby College and a Masters in Business Administration in Operations Management from Boston College.
Michael is Senior Partner in McKinsey’s New York office. He is a leader in the Advanced Industries Practice, with deep experience working with clients on strategy, operations, and corporate finance. Michael leads the work on M&A integration and divestitures, spanning corporate restructurings, spin-offs, asset sales, and master limited partnerships.

Over the past 13 years, Michael has worked with clients on a broad range of issues. He has developed portfolio strategies based on value-creation potential for industrial and energy original-equipment manufacturers, aerospace and defense contractors, and equipment-service players. He has advised industrial corporates, private-equity investors and sovereign-wealth funds on over 30 M&A transactions.

Michael was selected by the Partnership for New York City to serve as a David Rockefeller Fellow from 2011 to 2012. He is also a Corporate Term Member for the Council on Foreign Relations. Prior to joining McKinsey in 2003, Michael worked in Investment Banking at J.P. Morgan. Michael graduated magna cum laude, Phi Beta Kappa from Harvard College in Economics.
Linda joined Codiak from Avalanche Biotechnologies where, as Chief Financial Officer, she led a successful IPO and follow-on financing. She previously served as Vice President of Finance, Business Operations and Treasurer at bluebird bio, where her tenure included a Series D financing and IPO.

Linda has held senior roles at Genzyme Corporation, including Vice President of Finance, Global Manufacturing and Operations and Vice President of Finance of Genzyme Genetics, where she was a member of the team that divested the business unit to LabCorp for $925 million.

Earlier in her career, she served in senior finance roles at Fidelity Investments and AstraZeneca Pharmaceuticals and as an auditor at Deloitte & Touche. Linda received her B.S in Accounting and Business Administration and an Honors Degree in Accounting and Business Administration from the University of the Free State, South Africa. She is a Certified Public Accountant.

Sach is Dun & Bradstreet’s Chief Financial Officer for Global Operations & Strategic Planning, with oversight for the company’s financial responsibilities including global P&L and cash flow, strategic planning and budgeting, and financial systems transformation and implementation. He also co-owns workplace transformation for Dun & Bradstreet. He joined the company in 2001 as a college intern, and has held positions of ascending responsibilities during his fifteen year tenure.

Prior to joining Dun & Bradstreet, Sach developed an expertise in international banking, commerce and trading operations while working in India for one of Asia’s largest agricultural commodities processing and trade houses.

He earned his MBA from University of Buffalo, and also holds a Master’s degree in International Business from Indore University in India, where he has also served as an adjunct professor teaching graduate courses in international shipping and banking.
VINAY MEHRA  
CFO, Politico

Vinay serves as Chief Financial Officer of POLITICO, leading the company’s financial operations as well as corporate development and strategy. He started his career at Price Waterhouse in 1989, where he concentrated most of his 20-plus-year career in the communications, media and entertainment industries and gained experience advising on a range of corporate finance, strategic, operational, and organizational issues across a variety of sectors in the media and communications industries. He was a strategic advisor to industry leaders in publishing, broadcasting, cable, television, satellite, financial information and telecommunications.

JOHN VAN MAANEN  
Erwin H. Schell Professor of Management  
& Professor of Organization Studies, MIT Sloan

John is the Erwin Schell Professor of Organization Studies in the Sloan School of Management at MIT. He is an ethnographer of occupations and organizations focusing on work socialization practices, careers and cultures. The settings in which he has worked include police organizations, fisheries, educational institutions, Disneylands, and business firms. Van Maanen is the author of numerous articles and books including, most recently, Tales of the Field (University of Chicago Press, 2011, 2nd edition) and, with Edgar Schein, Career Anchors (Wiley, 2013, 4th edition). He holds an MS and PhD in social administration from the University of California Irvine and a BA in political science and sociology from California State University at Long Beach.

RUTH SILMAN  
Office Managing Partner, Nixon Peabody LLP

Ruth’s extensive environmental experience includes addressing air quality, hazardous waste assessment and remediation, brownfields redevelopment, wetlands protection, stormwater, wastewater, septic system and water quality issues at the federal, state and local level. She advises clients regarding environmental management systems and environmental audits. Ruth represents clients concerning the land use implications of complex real estate transactions, including zoning, environmental impacts, permitting and compliance.

Ruth provides support to real estate transactions, including due diligence and advice regarding appropriate contractual protections and environmental insurance. Ruth has represented clients before state and federal courts and administrative agencies in environmental and land use litigation matters. She is involved in renewable energy efforts, including representing wind power developers. Her experience spans various subjects including the development, permitting, construction and operation of renewable energy facilities.

Ruth has written and lectured on the Clean Air Act, climate change, renewable energy, brownfields, zoning, regulatory takings, insurance coverage in environmental cases, underground storage tanks, wetlands, the Massachusetts Rivers Protection Act, and environmental audits.
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One offers a better way to cook. The other promises a more efficient way to buy and sell a home. Although on the surface, the two companies seem to have little in common, Blue Apron and Redfin are among the most successful early-stage companies of the past decade. The CFOs of these two cutting-edge companies will reveal how innovative use of people and technology has led both to become recognized market leaders in their sector and built a long-term competitive advantage.

Brad joined Blue Apron, the high-growth meal kit delivery subscription service and food industry disruptor headquartered in New York City, as Chief Financial Officer in February 2016. In support of its tremendous growth, he oversees Blue Apron’s Accounting, Finance, Corporate Development, and Demand Forecasting functions. Previously, Brad held various positions at Under Armour, Inc., a multi-channel wholesaler, retailer, and e-commerce consumer brand from 2004 to 2016. During this timeframe, the Company’s revenue increased from $200 million to $4 billion and the employee count from roughly 500 to over 12,000. As CFO of Under Armour, he supported multiple acquisitions and company expansions into various international markets across Asia, Latin America, and Europe. From 2004 to 2008, Brad also served as Under Armour’s Vice President of Corporate Finance and Corporate Controller, and was an influential contributor to the company’s initial public offering.

Prior to joining Under Armour, Brad held roles at Network Building and Consulting (NB&C) and Price Waterhouse. He holds an MBA from Loyola University and a Bachelor’s degree in Accounting from the University of Akron.

Chris leads the finance team at Redfin. Before joining Redfin, Chris was the chief financial officer and chief operating officer of Zappos.com, a leading destination in online apparel and footwear sales, where he oversaw the company’s financial and fulfillment operations. Prior to Zappos.com, Chris led highly successful retail business segments, such as the home and garden store, at Amazon.com. He has also worked at business consulting firms Bain & Co. and Accenture. Chris holds a bachelor’s degree in industrial engineering from Stanford University, and a master’s degree in business administration from the MIT Sloan School of Management.

Lou is a Lecturer at the Martin Trust Center for MIT Entrepreneurship at the MIT Sloan School of Management. He teaches course 15.387, Technology Sales & Sales Management.

Lou is currently president and CEO of Black Duck Software in Burlington, MA. From August 2011 to August 2013, he was president and CEO of VMTurbo, Inc. Previously, Lou was president and CEO of Reflectent Software, acquired by Citrix Systems in 2006. After the Reflectent acquisition, Lou served as general manager of the Citrix Management Systems group, then took on the role of general manager of the Citrix Virtualization and Cloud Products Group. Lou worked as an entrepreneur in residence at Highland Capital Partners in 2002. Prior to Highland, Lou served as vice president of worldwide field operations for WebLine Communications, a customer contact center software company acquired by Cisco Systems in 1999 for $325 million. Before WebLine, Lou served as vice president of the Americas and Pacific operations at Avid Technology.

He joined Avid when the company was a startup and oversaw its growth to over $450 million in revenue. Lou also founded and served as president of Avid Japan, KK.

Lou serves as a Chairman of the Board of CustomerGauge and is an advisor to AppFirst and Unidesk Software.

Lou holds a BA in economics from Trinity College and an MBA from Harvard Business School.
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