POWER: A CFO’S BOLD MOVES
MARKETING

DEAR FRIENDS,

You have come to the right place to hear how leaders assert themselves across organizations to deliver results. Of course, today’s bold moves may face resistance as unnecessary or too risky. Only with the advantage of hindsight are they recognized as visionary. Your challenge, therefore, is to ask the right questions and learn the right lessons to power your team for strategic and operational success.

We’ll end the formal portion of our conference on a high note (get it?) with Power: A CFO’s policy changes, and new market opportunities. Include a look at cannabis science and technology, increasingly deregulated, the business of cannabis and Canopy Growth Corporation. With marijuana going where no CFO has gone before.

Thank you for attending; a great day is ahead. Learn more about the MIT Sloan CFO Summit. A bold and powerful welcome to the 16th annual MIT Sloan CFO Summit!

A BOLD AND POWERFUL WELCOME TO THE 16TH ANNUAL MIT SLOAN CFO SUMMIT!
TRACK 1: PROCESS – GRAND BALLROOM
Strategy Beyond the Hockey Stick
Werner Rehm
Partner, McKinsey
Diane Basile
Chief Financial Officer, CFA Institute
Justin Crotty
Chief Financial Officer, Anaqua
Robert Gibney
Chief Financial Officer, Monster.com
Kenneth Goldman
Senior Vice President and Chief Financial Officer, Everbridge, Inc.

TRACK 2: PEOPLE – SALONS FGH
When Bold Means Sell
Amy O’Keefe
Partner, Private Equity & Investment Funds Practice, Nixon Peabody LLP
Thomas Blesso MBA ’09
Chief Financial Officer, Penn Foster Education Group
Lang Leonard
Chief Financial Officer, LevelUp
Chris Menard
Chief Financial Officer, BlueSnap
Christopher Montgomery
Managing Director, Head of Software, Americas, UBS

GRAND BALLROOM FOYER
MORNING COFFEE BREAK
10:00 AM – 10:30 AM
10:30 AM – 11:30 AM

TRACK 1: PROCESS – GRAND BALLROOM
Digital Finance, Digital World
Ash Noah
Vice President, CGMA External Relations, American Institute of CPAs (AICPA)
Doug Baker
Managing Director, KPMG
Tiffany Freitas
Chief Business Officer, PathAI
Anitha Gopalan
Chief Financial Officer, Catalant Technologies
Dr. Michael Siegel
Principal Research Scientist, MIT Sloan

TRACK 2: PEOPLE – SALONS FGH
Reconstructing the Workforce for Growth
Nancy Persson
Executive Coach, Leadership Development Consultant, and Principal, Leadership Growth Solutions
Kevin Durkin
Chief Financial Officer, Threat Stack
Melissa Gillespie
Vice President, HR Services, HR Knowledge Solutions
Dr. Shan Nair
President, Nucleus
Amit Singhi
Chief Operating and Financial Officer, Piston Group

GRAND BALLROOM FOYER
LUNCHEON KEYNOTE PANEL INTRODUCTION
Peter Grant
Associate Dean, MIT Sloan Executive Education

LUNCHEON KEYNOTE PANEL – GRAND BALLROOM
CHUTZPAH IN THE CFO SUITE: BOLD DECISIONS, ACTIONS AND OUTCOMES
Kimberly Johnson
Product ion Products Editor, The Wall Street Journal
David Davidov
Senior Vice President and Chief Financial Officer, GoDaddy
Glenn Schiffman
Chief Financial Officer, IAC
Michael Sheridan
Chief Financial Officer, Design

SPONSORED BY MIT SLOAN EXECUTIVE EDUCATION
GRAND BALLROOM FOYER
LUNCHEON BUFFET

AGENDA
#MITCFO
MODERATOR
Every company wants to be the next Amazon or Apple, the firm with a permanent spot in the news for its cutting-edge products and a name synonymous with innovation. But it takes a special set of qualities to get there, and Hal Gregersen has dedicated his career to finding out what kind of skills, corporate culture and set of practices produce innovative powerhouses. As executive director of the MIT Leadership Center, and Senior Lecturer in Leadership and Innovation at MIT’s Sloan School of Management, he has created a methodology by which corporate leaders can raise their companies’ levels of creative inquiry, unleash the potential of their employees, and make a meaningful impact on their industries and on the world.

The crux of Mr. Gregersen’s argument, spelled out in his forthcoming book *Questions Are the Answer: A Breakthrough Approach to Your Most Vexing Problems at Work and in Life* (Harper Collins, November 2018), is while business leaders and employees alike are programmed to look for answers, the real catalyst for innovative change is questioning. The most successful companies are those that facilitate brainstorming and thinking outside the box.

Mr. Gregersen has also co-authored, with Clay Christensen and Jeff Dyer, *The Innovator’s DNA: Mastering the Five Skills of Disruptive Innovators* (Harvard Business Review Press, 2011), a guide to cultivating the personal skills embodied by the most successful CEOs and entrepreneurs. Having deeply researched and interviewed groundbreaking leaders like Amazon’s Jeff Bezos and P&G’s A.G. Lafley, Gregersen draws on personal experience and rigorous research and analysis to successfully advise the world’s largest corporations.

Ranked one of the world’s 25 most influential management thinkers by Thinkers50 and winner of the 2017 Distinguished Achievement Award for leadership, Mr. Gregersen regularly delivers inspirational keynote speeches, motivational executive seminars and transformational coaching experiences. Along with ten books, Gregersen is the author of more than 50 articles, book chapters, and cases on leading innovation and change (with more than 10,000 citations by other scholars). His research has been highlighted in global media such as BBC, CNN, *The Economist*, *Fast Company*, *Financial Times*, *Forbes*, *Fortune*, *The New York Times*, and *The Wall Street Journal*.

His tenure at MIT is the culmination of an illustrious academic journey that has included teaching posts at INSEAD, London Business School, Dartmouth’s Tuck School of Business, Brigham Young University, and a Fulbright Fellowship in Finland. Prior to his academic career, he was an advisory board member at Pharmascience, a Montreal-based pharmaceutical company, and he remains a senior fellow at the global innovation consulting firm Innosight. Like many companies, his personal experience and rigorous research and analysis to successfully advise the world’s largest corporations.

CFOs are constantly problem-solving. They are expected to have the answers and make informed decisions about complex problems. But by rushing to answers and solutions, they miss opportunities to innovate in bigger and bolder ways. Join Hal Gregersen as he explores how senior financial executives can unlock better answers to their most vexing problems—and reveal breakthrough insights—by asking better questions.

Ted School of Business, Brigham Young University, and a Fulbright Fellowship in Finland. Prior to his academic career, he was an advisory board member at Pharmascience, a Montreal-based pharmaceutical company, and he remains a senior fellow at the global innovation consulting firm Innosight.
John Murphy
Executive Vice President and Chief Financial Officer,
Adobe

With his appointment to Executive Vice President and Chief Financial Officer in April 2018, John Murphy is putting more than 25 years of finance experience to work leading Adobe’s worldwide Finance and Operations team and driving continued business momentum. Previously serving as Adobe’s Chief Accounting Officer (CAO) and Corporate Controller, Mr. Murphy has quickly built a reputation as a champion for growth and innovation by leading initiatives to help the company scale the organization and re-imagine its processes using cutting-edge technologies.

Prior to joining Adobe in 2017, Mr. Murphy was CAO and Global Controller at Qualcomm, where he managed a global team leading core financial functions for the company. Previously, he spent 10 years at DIRECTV, ultimately leaving the company as senior vice president and chief accounting officer and controller. Mr. Murphy also held senior financial positions at Experian and Heat & Air and began his professional career at PWC. He has an MBA from the University of Southern California’s Marshall School of Business and a B.A. in Accounting from Fordham University and is a licensed CPA (inactive).

John Murphy
9:00 AM – 9:30 AM
GRAND BALLROOM

MIT’s Hal Gregersen and Adobe’s John Murphy will discuss the company’s transformation from a narrow-focused product to a cloud-enabled subscription service. Hear how Mr. Murphy has embraced technology—deploying artificial intelligence and robotic process automation within the finance function.

Hal Gregersen
Executive Director, MIT Leadership Center and author of Questions are the Answer

Invest in ideas
Empowering today’s CFOs

UBS is proud to sponsor the 18th annual MIT Sloan CFO Summit. We believe investing in learning and thought-provoking discussion about the future of finance,科技创新 and business is one of the best investments we can make. The theme of creating bold moves applies to our dedication to you, our CFO clients. To receive a CFO wealth report, please contact:

Jeremy Seidman
Head of private wealth management
617-247-5120
jeremy.seidman@ubs.com

UBS Financial Services Inc.
1500 Calendar Street
2448 Hoke
Boston, MA 02116
JT MCCORMICK is the author of *I Got There: How I Overcame Racism, Poverty and Abuse to Achieve the American Dream*. Mr. McCormick will share the powerful lessons and bold decisions that lead him from the poorest housing projects of Dayton, Ohio to success in both business and investing.

President & CEO, Scribe Media

Mr. McCormick is currently the President and CEO of Scribe Media, a publishing company that’s created an entirely new way for you to write a book. The company has worked with more than 900 authors and was recently ranked in their category as the #2 best company to work for in Austin.

Previously he was the President of Headspring Software, and helped grow it to a multi-million dollar 100+ person company which was repeatedly ranked as one of the best places to work in all of Texas.

Mr. McCormick is the author of *I Got There: How I Overcame Racism, Poverty, and Abuse to Achieve the American Dream*. His book tells the story of how he worked his way out of poverty, starting his career cleaning toilets and eventually becoming the President of multiple companies.

Over the past five years, he has mentored at-risk youth in the juvenile justice system as well as youth within low economic communities. He has also coordinated Backpack Drives for numerous elementary schools in low economic communities, providing over 3,000 backpacks filled with school supplies for students.

Mr. McCormick’s work has been featured on *CNBC*, *Entrepreneur*, *Forbes*, *Inc* and many others. He lives in Austin, Texas, with his wife, Megan, and their three children Ava, Jaxon and Elle.

---

At Silicon Valley Bank, we work with the brightest minds across the global innovation economy. We help you build your business for every stage.
As Chief Financial Officer and Managing Director, Diane Basile leads the treasury, business planning and analysis, and finance and operations teams. She is responsible for the financial leadership of CFA Institute and contributing to the organization's strategic evolution and global expansion. During her more than 20 years of experience in finance, Ms. Basile served as senior vice president, chief financial officer; and treasurer for American Science & Engineering, Inc., and chief financial officer for Interfis, Inc., as well as vice president of finance in Nasdaq Communications' Heathrow Division.

In addition, she has held finance positions at Fidelity Investments, Merrill Lynch & Co., Digital Equipment. She is a member of the Boston Security Analysts Society. Ms. Basile holds a master's degree in finance from the University of Connecticut and an MBA from the Kellogg School of Management at Northwestern University where she was a Citigroup Scholar. She also earned a Bachelor of Science degree in finance from the University of Connecticut.

We want to thank Diane Basile for speaking today. She is a very knowledgeable speaker in finance and was able to make complex ideas understandable and engaging. She provided valuable insights on how to approach financial challenges and strategies to ensure sustainable long-term growth. Her expertise and passion for finance truly inspired us.

Thank you, Diane, for your valuable contributions to our understanding of financial strategies and their impact on business success.
WE OFTEN THINK OF LEADERSHIP when undertaking a bold move in acquiring another company via an M&A transaction. But, sometimes the most audacious move is one that calls for selling a business early in its life cycle, or shedding a long-held service to focus on another part of the business. This panel of experts will discuss how their companies have successfully navigated current economic trends to execute a bold exit for their organizations.

10:30 AM – 11:30 AM
SALONS FGH

MODERATOR

THOMAS BLESSE
Chief Financial Officer, LevelUp

Tom Blesso is the Chief Financial Officer of LevelUp Education Group. He has grown a track record executing profitable growth strategies and has 15 years of progressive financial management experience in a variety of industries including education services, software, and consumer goods. Prior to joining Penn Foster, Mr. Blesso was the Director of Finance for The Princeton Review. He received an MBA from the MIT Sloan School of Management.

LANG LEONARD
Chief Financial Officer, LevelUp

Lang Leonard has been Chief Financial Officer at LevelUp since 2014. LevelUp is a mobile ordering and mobile payments platform which connects restaurants and guests with a customer experience that blends analytics, loyalty, and rewards. Mr. Leonard is an experienced financial leader for early stage software and service companies with a particular focus on international expansion including structure, funding, and legal. He also has extensive experience with acquisitions, reorganizations and strategic alliances. Mr. Leonard holds a BA in economics (cum laude) from Colgate College, and a JD from Boston University School of Law, as well as an MBA (with honors) in finance from Boston University’s Questrom School of Business.

CHRIS MENARD
Chief Financial Officer, BlueSnap

Chris Menard, Chief Financial Officer, brings 20 years of corporate finance and business administration leadership experience to BlueSnap. In his role with BlueSnap, Mr. Menard oversees the Finance and legal teams. With a long and successful track record of growing organizations, he is positioned to guide BlueSnap in its next phase as a payments solutions leader.

CHRIS MONTGOMERY
Managing Director, Head of Software, Americas, UBS

Chris Montgomery joined UBS in 2016 and leads the UBS Americas Software practice. Previously he was a Senior Vice President with Jefferies, and prior to that was responsible for supply and demand management for server and workstation processors for Intel Corporation. Mr. Montgomery has more than 11 years of experience as an investment banker in the Enterprise Software and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and communications software on strategic advisory and capital market transactions.

AMY O’KEEFE
Partner, Private Equity & Investment Funds Practice, Nixon Peabody LLP

Amy O’Keefe is a partner in Nixon Peabody’s Private Equity and Investment Funds group. She works with both emerging and established private equity and private and strategic buyers as well as financial buyers and sellers of privately held businesses. She is a thought leader in the field, representing both public and private buyers, as well as entrepreneurs, in M&A and investment transactions.

Chris Menard joined UBS in 2016 and leads the UBS Americas Software practice. Previously he was a Senior Vice President with Jefferies, and prior to that was responsible for supply and demand management for server and workstation processors for Intel Corporation. Mr. Montgomery has more than 11 years of experience as an investment banker in the Enterprise Software and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and communications software on strategic advisory and capital market transactions.

CHRISTOPHER MONTGOMERY
Managing Director, Head of Software, Americas, UBS

Mr. Montgomery earned his BS in Computer Systems Engineering from Stanford University and his MBA from Harvard Business School.

LANG LEONARD
Chief Financial Officer, LevelUp

Lang Leonard has been Chief Financial Officer at LevelUp since 2014. LevelUp is a mobile ordering and mobile payments platform which connects restaurants and guests with a customer experience that blends analytics, loyalty, and rewards. Mr. Leonard is an experienced financial leader for early stage software and service companies with a particular focus on international expansion including structure, funding, and legal. He also has extensive experience with acquisitions, reorganizations and strategic alliances. Mr. Leonard holds a BA in economics (cum laude) from Colgate College, and a JD from Boston University School of Law, as well as an MBA (with honors) in finance from Boston University’s Questrom School of Business.

CHRIS MENARD
Chief Financial Officer, BlueSnap

Chris Menard, Chief Financial Officer, brings 20 years of corporate finance and business administration leadership experience to BlueSnap. In his role with BlueSnap, Mr. Menard oversees the Finance and legal teams. With a long and successful track record of growing organizations, he is positioned to guide BlueSnap in its next phase as a payments solutions leader.

CHRIS MONTGOMERY
Managing Director, Head of Software, Americas, UBS

Chris Montgomery joined UBS in 2016 and leads the UBS Americas Software practice. Previously he was a Senior Vice President with Jefferies, and prior to that was responsible for supply and demand management for server and workstation processors for Intel Corporation. Mr. Montgomery has more than 11 years of experience as an investment banker in the Enterprise Software and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and communications software on strategic advisory and capital market transactions.

CHRISTOPHER MONTGOMERY
Managing Director, Head of Software, Americas, UBS

Mr. Montgomery earned his BS in Computer Systems Engineering from Stanford University and his MBA from Harvard Business School.

AMY O’KEEFE
Partner, Private Equity & Investment Funds Practice, Nixon Peabody LLP

Amy O’Keefe is a partner in Nixon Peabody’s Private Equity and Investment Funds group. She works with both emerging and established private equity and private and strategic buyers as well as financial buyers and sellers of privately held businesses. She is a thought leader in the field, representing both public and private buyers, as well as entrepreneurs, in M&A and investment transactions.

Chris Menard joined UBS in 2016 and leads the UBS Americas Software practice. Previously he was a Senior Vice President with Jefferies, and prior to that was responsible for supply and demand management for server and workstation processors for Intel Corporation. Mr. Montgomery has more than 11 years of experience as an investment banker in the Enterprise Software and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and communications software on strategic advisory and capital market transactions.

CHRISTOPHER MONTGOMERY
Managing Director, Head of Software, Americas, UBS

Mr. Montgomery earned his BS in Computer Systems Engineering from Stanford University and his MBA from Harvard Business School.

AMY O’KEEFE
Partner, Private Equity & Investment Funds Practice, Nixon Peabody LLP

Amy O’Keefe is a partner in Nixon Peabody’s Private Equity and Investment Funds group. She works with both emerging and established private equity and private and strategic buyers as well as financial buyers and sellers of privately held businesses. She is a thought leader in the field, representing both public and private buyers, as well as entrepreneurs, in M&A and investment transactions.

Chris Menard joined UBS in 2016 and leads the UBS Americas Software practice. Previously he was a Senior Vice President with Jefferies, and prior to that was responsible for supply and demand management for server and workstation processors for Intel Corporation. Mr. Montgomery has more than 11 years of experience as an investment banker in the Enterprise Software and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and communications software on strategic advisory and capital market transactions.
Let’s turn blockchain ideas into business results

IBM Blockchain

Transform your business with the world’s most advanced blockchain expertise, technology and ecosystems. IBM Blockchain is helping hundreds of clients in finance, supply chain, healthcare, insurance, consumer goods, government, automoive, transportation and more launch dozens of value-producing blockchain networks.

What will we solve together?

ibm.com/blockchain

GROW YOUR BUSINESS ON THE #1 CLOUD ERP

WWW.NETSUITE.COM

ORACLE

NETSUITE
Peter Hirst leads the team of professionals who partner with clients and faculty at the MIT Sloan to develop, deliver, and continuously improve innovative education programs for individuals and companies. Formerly the Chief Executive Officer of the corporation, consultancies, consulting, and executive education business of the London School of Economics, he has over 20 years of experience in international strategy, technology consulting, and organizational development. He is a past president of the British-American Business Council of New York, and a trustee and treasurer of the American Foundation of the University of St Andrews in Scotland. He is also co-chair of the Forum, and a founding member of the Internet of Things Council of New England, and is a trustee and treasurer of the Institute for Global Ethics.

David Frear is Senior Vice President and Chief Financial Officer at SiriusXM. Prior to joining SiriusXM, Mr. Frear was Executive Vice President and Chief Financial Officer at DIRECTV. During Mr. Frear’s tenure, DIRECTV’s stock price increased more than four times, from $5 per share to $22 per share.

Glen H. Schiffman serves as Executive Vice President and Chief Financial Officer of IAC, and Chief Financial Officer of Match Group. He also serves as a member of the Board of Directors of ANGI HomeServices Inc. In these roles, Mr. Schiffman oversees corporate finance, accounting, M&A, investor relations, and administration functions. Prior to his appointment at IAC, Mr. Schiffman served as Senior Managing Director at Guggenheim Securities. Previously, he was a Partner at The Rho Group, a merchant bank focused on advising and investing in the technology, media, and telecommunications industries. Overall he has led over 115 transactions.

Michael Sheridan is the world’s largest trading company measured by revenue, with more than $51 billion in revenue, and serves more than 464 separate clients in the United States. Prior to joining Enstate, Mr. Frear was Executive Vice President and Chief Financial Officer of DIRECTV. During Mr. Frear’s tenure, DIRECTV’s stock price increased more than four times, from $5 per share to $22 per share.

Kimberly S. Johnson is Professional Products Editor, a role that helps them understand their industries, grow their businesses and advance their careers. She is responsible for more than 60 journalists generating news, analysis and data for those professional verticals, leading a team of more than 20 editors, writers, and analysts. She is responsible for the suite of WSJ Pro Products launched in recent years, as well as for the The ICB Journal, CFO Journal, Corporate Risk & Compliance, CFO Journal, and Corporate Risk & Compliance.

As Director of the CFO Journal, Michael Sheridan is responsible for overseeing the teams that drive global financial thought analysis and insights, including accounting, procurement and investor relations.

Mr. Sheridan has more than 15 years of CFO experience in high growth technology companies and a strong track record of leading high performance financial teams to success. Before joining DocuSign, Mr. Sheridan spent more than four years as CFO at Doordash. And prior to his role there, he held CFO roles at several technology companies— including Minnetech Systems, Facebook, IGN Entertainment and Sonoma Media. Before Sonoma Media, Mr. Sheridan worked as an executive in the European Telecommunications and Naap.

Mr. Sheridan has a Bachelor of Science degree from Santa Clara University.
Doug Baker is a Principal in KPMG Management Consulting, with nearly 20 years of industry and consulting experience across the finance continuum. He has delivered ideas, both strategic and tactical in nature, affecting both finance and operational functions. Focusing on improving bottom-line results through integration, he brings hands-on knowledge and practical experience developing a strategic vision and implementing the process, system, and organizational changes required to achieve it.

Mr. Baker has led multiple finance and operational transformations at global automotive OEM and suppliers, directed enterprise-wide process implementation at a drug diagnostic company, and directed an enterprise Hyperion EPM implementation at a drug diagnostic company, and led the design and reorganization of the global accounting function. During his tenure he implemented the process, system, and organizational changes required to achieve it.

He has delivered projects both strategic and tactical across functional areas including the design and development of enterprise systems and processes, and has been actively involved in the development of strategy and financial planning. He has also led a number of business turnarounds in transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express.

Ash Noah is Vice President CGMA External Relations at the Association of International Certified Professional Accountants (AICPA) and acts as liaison to CFOs and finance leaders. He has previously served as CFO of this International Unit of the global transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express.

He has worked closely with the Chartered Institute of Management Accountants (CIMA) and acts as a liaison to CFOs and finance leaders. He has previously served as CFO of this International Unit of the global transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express, and has served as CFO of the International Unit of the global transport and logistics provider, TNT Express.
Kevin Durkin is responsible for leading Finance and Administration. He brings more than 20 years of financial and operational experience at high-growth technology start-ups.

Prior to joining Thrust Stack, Mr. Durkin was the Chief Financial Officer of DataFirst and Chief Financial Officer of Airsys (acquired by Zions Bancorp). A CPA, he started his finance career at Deloitte and gained valuable experience working at notable companies such as RSA, Cisco Systems, and Salary.com.

MELISSA GILLESPIE
Vice President, HR Services, HR Knowledge

Since 2010, Ms. Gillespie has advised and worked with HR Knowledge’s clients in all areas of HR management, including human capital best practices, organizational enhancement, workforce planning, performance measurement and compliance. She believes that a strong HR strategy improves a company’s productivity, quality, and employee retention. Mr. Gillespie’s commitment to service mirrors the culture and commitment that HR Knowledge strives to provide to its clients.

Prior to HR Knowledge, Ms. Gillespie was most recently an independent HR Consultant. In this role, she was a trusted business advisor to small and mid-sized organizations providing guidance, direction and advice about the application or interpretation of human resources and labor policy laws, as well as practices and procedures that can be implemented to provide an efficient and effective HR resource management.

Dr. Shan Nair is an entrepreneur and consultant on international expansion. He co-founded an earlier company bearing his name and grew it from a 2-person start-up to an international business enterprise with about 700 employees in offices in 6 countries before selling the entire business to Private Equity in 2013.

Dr. Nair was the first to spot and develop a market niche providing one-stop shopping for small and medium sized U.S. technology companies seeking international expansion. In the process he has worked with many companies in their early stages who have since become household names such as Tesla Motors, FinalTune and Sansa Networks.

Nancy Persson is Executive Coach, Leadership Development Consultant, and Principal, Leadership Growth Solutions.
We Empower CFOs.

We are a professional membership association dedicated to Empowering CFOs. Built by and for CFOs, there are 23 chapters from coast to coast, and Boston is our home. Join today to gain access to exclusive live events, online educational programs, a network of thousands of CFOs, and our collection of leadership development resources - all designed to deliver tangible, pragmatic insights or business and leadership issues senior financial executives face.

2019 CFO LEADERSHIP CONFERENCE
“The Seven Pillars of the Modern CFO”

May 13-14, 2019
Renaissance Boston Seaport District

WE BUILD VIBRANT, AGILE BRANDS FOR VISIONARY ORGANIZATIONS.

Discover what we can do for you

M Oneder Design

017661-6123
www.monederdesign.com
MODERATOR

2:30 PM – 3:30 PM
GRAND BALLROOM

Vice President of Sales, IBM

Julia Abramovich is a Vice President of Sales for IBM’s Cloud Software Business for Retail, Consumer Products, and Life Sciences. Ms. Abramovich has over twenty years of work experience in sales, strategy, consulting, marketing, and business development. She also serves on the Greater Boston Women’s Foundation’s Board of Directors in Massachusetts.

Ms. Abramovich successfully led many sales teams in the Retail, Financial Services, and other verticals to growth. Previously, she was a Chief of Staff for a 50,000 person GBS consulting organization, where she started her career in 2002. As a strategy consultant, she focused on industry’s most complex operations challenges, and on helping national retail clients implement new brand strategies and increase sales through understanding and interpreting customer preferences.

Prior to receiving her MBA, Ms. Abramovich worked in Human Resources as a senior compensation analyst at a management consulting firm and administered the firm’s executive compensation program. She has also worked for several start-up organizations.

Ms. Abramovich graduated with honors from Brandeis University with a BA in Mathematics and minors in Computer Science, the National Academy of Engineering, and the RSA prize (in theoretical computer science) and the NAE (in theoretical computer science) and the RSA prize (in theoretical computer science). Silvio Micali is the recipient of the Gödel prize (in theoretical computer science) and the NAE prize (in theoretical computer science) and the RSA prize (in theoretical computer science). Silvio Micali is a Professor of Engineering.

Born in Palermo, Italy, Silvio Micali received his Ph.D. in Computer Science from the University of California at Berkeley in 1983. He joined MIT in 1983, where he is Ford Professor of Engineering.

His scientific interests include complexity-based program design and cryptography, interactive and computationally secure proofs, zero knowledge, and mechanism design.

Mr. Micali is the recipient of the Gödel prize (in theoretical computer science) and the RSA prize (in theoretical computer science) and the NAE prize (in theoretical computer science). Silvio Micali is a Professor of Engineering.

Mr. Pipp earned a MS in finance from Boston College in 2002. He is also a Certified Financial Analyst (CFA) designation.

Mr. Pipp is a Research Manager based in San Francisco, CA, responsible for leading capital markets research and data-driven analysis on the venture economics that Silicon Valley Bank (SVB) serves globally.

Mr. Pipp is the author of SVB’s flagship State of the Markets report which addresses the most pressing questions facing late-stage technology companies and investors. These quarterly pieces draw on insights from thought leaders across SVB and have explored topics such as the rise of China’s innovation ecosystem, the effect of international tension on cross-border investment, and the influence of non-traditional venture investors.

Prior to joining SVB in 2017, Mr. Pipp held a variety of roles managing advisory and valuation engagements for venture-backed technology companies as part of SVB Analytics. Before joining SVB, he worked in Minneapolis, Minneapolis

Mr. Pipp earned a MS in finance from Boston College and a BS in finance from the University of Minnesota. In addition, he holds the Chartered Financial Analyst (CFA) designation.
**BOB CRUICKSHANK**  
Chief Financial Officer, ezCater  

Bob Cruickshank is Chief Financial Officer of ezCater. He is a proven finance leader with more than twenty years’ experience in both public and private companies, high growth startups, and mature-stage organizations. Prior to ezCater, Mr. Cruickshank served as Chief Financial Officer at Amazon Robotics (formerly Kiva Systems), where he led financial integration with Amazon, and built a finance and accounting function that supported a 10x scaling of operations. Prior to that, he served as vice president of finance at Aspen Technology, held a BA from Wake Forest University and an MBA from Northeastern University.

**NICOLE HEIFNER**  
Partner, Highland Capital Partners  

Nicole Heifner joined Highland Therapeutics in September 2017 and serves as Chief Financial Officer. Prior to joining Acerta, she has successfully led initial public offerings in biotechnology—first as the Senior Director of Finance at Glympse, Inc. and most recently as the Senior Vice President and Chief Accounting Officer at Intellia Therapeutics, Inc., where she oversaw all aspects of finance, accounting and treasury. Ms. Heifner began her career in the audit practice of Deloitte. She graduated from Boston University with a degree in business administration, with a focus in accounting.

**FRANK SMALLA**  
Treasurer & CFO, Boston Beer  

Frank H. Smalla was named Treasurer and Chief Financial Officer of Boston Beer (NYSE: SAM) on February 19, 2016, after serving in the interim position of Senior Vice President, Finance since January 2016. Mr. Smalla previously worked in various senior finance roles for Kraft Foods Group, Inc. of Northfield, Illinois from 1995 through 2015, most recently as Senior Vice President, Finance of Kraft Foods Group, Inc., U.S. Business Units, U.S. Snacks, Integrated Supply Chain, R&D and Marketing Services.

**CRAIG DRICOLL**  
Partner, Highland Capital Partners  

Craig Dricoll leads the tail and recruiting activity for the Financial Highland portfolio. He draws on executive recruiting experience. He has also helped build the leadership teams of some of the most innovative technology companies across a range of industries and geographies.

More recently, Mr. Dricoll has leveraged his broad networks and team building acumen to pursue investments in several areas including software. He is on the board of Remote Year and Trilogy Education Services, and actively involved with Canopify, K stalk, and Soothe. He is previously active with the boards of Buffalo (acquired by Vista Equity) and Quorir (acquired by Apple).

Mr. Dricoll joined Highland from Korn Ferry where he was an executive recruiter in the leadership teams of some of the most innovative technology companies across a range of industries and geographies. He is a proven finance leader with more than twenty years’ experience in a number of senior-level accounting and finance positions on a project and interim basis.

**CAROLINE HEIFER**  
Senior Vice President and Chief Accounting Officer  

Nicole Heifner joined Accent Therapeutics in September 2017 and serves as Chief Financial Officer. Prior to joining Acerta, she has successfully led initial public offerings in biotechnology—first as the Senior Director of Finance at Glympse, Inc. and most recently as the Senior Vice President and Chief Accounting Officer at Intellia Therapeutics, Inc., where she oversaw all aspects of finance, accounting and treasury. Ms. Heifner began her career in the audit practice of Deloitte. She graduated from Boston University with a degree in business administration, with a focus in accounting.

**CRAIG DRICOLL**  
Partner, Highland Capital Partners  

Craig Dricoll leads the tail and recruitment activity for the Financial Highland portfolio. He draws on executive recruiting experience. He has also helped build the leadership teams of some of the most innovative technology companies across a range of industries and geographies.

More recently, Mr. Dricoll has leveraged his broad networks and team building acumen to pursue investments in several areas, including software. He is on the board of Remote Year and Trilogy Education Services, and actively involved with Canopify, K stalk, and Soothe. He is previously active with the boards of Buffalo (acquired by Vista Equity) and Quorir (acquired by Apple).

Mr. Dricoll joined Highland from Korn Ferry where he was an executive recruiter in the leadership teams of some of the most innovative technology companies across a range of industries and geographies. He is a proven finance leader with more than twenty years’ experience in a number of senior-level accounting and finance positions on a project and interim basis.

**FRANK SMALLA**  
Treasurer & CFO, Boston Beer  

Frank H. Smalla was named Treasurer and Chief Financial Officer of Boston Beer (NYSE: SAM) on February 19, 2016, after serving in the interim position of Senior Vice President, Finance since January 2016. Mr. Smalla previously worked in various senior finance roles for Kraft Foods Group, Inc. (acquired by Apple).

**DONALD RICE**  
Senior Vice President, Robert Half Management Resources  

Dan DeNisco is the Senior Vice President for North America of Robert Half Management Resources, a division of Robert Half and the world’s premier provider of permanent-level accounting and finance professionals and executive search services.

Prior to joining RHI in 1985 as a recruiting manager, Mr. DeNisco has held several highly visible positions with the company, including Area Manager for its New York and Southeastern Canada, Regional Manager for the Midwest, Atlantic and Western Regional Manager for the Carolinas, Georgia and Florida.

In 2017, Mr. DeNisco began his career in Buffalo, N.Y. at J.D. Stetler & Co., CPAs. During his tenure with the large CPA firm, he worked as a Staff Accountant, Senior Accountant, Manager and Senior Manager/Manager. Mr. DeNisco has a B.S. degree in Accounting from SUNY at Buffalo and an inactive licensed CPA in New York State.
The Business of Cannabis

In his capacity as Chief Financial Officer at Tilray, Mark Castaneda is responsible for steering Tilray’s finance function to drive the company’s vision to be the most strategic lever in the cannabis industry and a leader in the development of science-based cannabis medicine through global expansion.

Mark Castaneda
Chief Financial Officer, Tilray

In his role with Canopy Growth, Tim Saunders has been instrumental in driving the company’s growth strategy, including its entry into new markets and product categories.

Tim Saunders
Executive Vice President and Chief Financial Officer, Canopy Growth Corporation

Scott Stern is Professor of Management, MIT Sloan School of Management. Professor Stern explores how to embed innovation and entrepreneurship in strategy, business models, and organizations, and the consequences of these differences for strategy and policy.

Scott Stern
Professor of Management, MIT Sloan School of Management

MARK CASTANEDA
Chief Financial Officer, Tilray

Tim Saunders is a finance executive with international experience in public companies and private equity-backed start-ups. His leadership style focuses on business transformation and forward thinking to advance business capability and the business model. He joined Canopy Growth Corporation as the Chief Financial Officer in June 2015. Since joining the company, Mr. Saunders has managed multiple financings that have raised over $6 billion and directed 25 M&A transactions that increased the company’s share capacity, brand strength and global brand footprint.

Mr. Saunders joined Canopy Growth through a merger with Tweed Inc., a private national roofing contractor, and from October 2004 to August 2006, he served as Chief Financial Officer for Plasco Energy Group, a publicly traded energy solutions provider, where he helped lead its initial public offering in July 2005.

Mr. Saunders also served as the Chief Financial Officer of Blue Rhino Corporation from November 1997 to October 2004 and as a member of the board of directors of Blue Rhino Corporation from September 1998 to April 2014. Mr. Castaneda helped lead Blue Rhino’s initial public offering in May 1996. Mr. Castaneda began his career with Deloitte & Touche in 1988 and is a certified public accountant. Mr. Castaneda has served on the Audit Committee of Blue Rhino Global Holdings, LLC since August 2016. Mr. Castaneda holds a BS in Accounting and a Masters, Taxation from DePaul University.

Mr. Saunders earned his CPA with PricewaterhouseCoopers in 1993. From October 1993 to 2001, he held executive finance positions at Milcor, Zantrip Semis, Vodafone (U.K./Czech Republic), Osram Mobil (Czech Republic) and Plass & Energy Group.

Mr. Saunders earned his CPA with PricewaterhouseCoopers in 1993. From October 1993 to 2001, he held executive finance positions at Milcor, Zantrip Semis, Vodafone (U.K./Czech Republic), Osram Mobil (Czech Republic) and Plass & Energy Group.

Mr. Saunders earned his CPA with PricewaterhouseCoopers in 1993. From October 1993 to 2001, he held executive finance positions at Milcor, Zantrip Semis, Vodafone (U.K./Czech Republic), Osram Mobil (Czech Republic) and Plass & Energy Group.

Mr. Saunders earned his CPA with PricewaterhouseCoopers in 1993. From October 1993 to 2001, he held executive finance positions at Milcor, Zantrip Semis, Vodafone (U.K./Czech Republic), Osram Mobil (Czech Republic) and Plass & Energy Group.
HR Knowledge

Your HR Business Process Outsourcer

- Integrated HR Outsourcing
- Employee On-Boarding Services
- A/R & A/P Technology Support Services
- Managed Payroll Processing
- Benefit Brokerage & Administration
- Concierge-Level Client Service

15 Blackwells Road Suite B
MANCHESTER, MA 02058
508.339.1300 | HR@wenner.com
FOLLOW US ON TWITTER @HRKNOWLEDGE

YOUR BRAND

YOUR BRAND
YOUR BRAND
YOUR BRAND
YOUR BRAND
YOUR BRAND
YOUR BRAND

GO BOLD WITH YOUR BRAND

Warner Communications is at the forefront of the communication revolution. Our approach combines insights, data, creativity, integrated communications, and powerful results to help your business grow. Discover how we can help you move your business forward at www.warnerpr.com.

CONTACT US
Kendall PRESS CENTER, WAYNE, NE
708.656.5000 | www.warnerpr.com | twitter/woods

WARNER COMMUNICATIONS

BREAKING CONVENTION SPARKING INVENTION

Since its founding, MIT has fostered a spirit of ingenuity and creative adventure. As a result, our faculty and students are behind some of the world's boldest innovations and innovative companies. There are literally thousands of executives and senior managers from around the globe who are MIT Sloan Executive Education alumni who are working at the forefront of their fields, helping to drive revolutionary change at work and in life.

Join your peers in programs that provide the latest in breakthrough business thinking. Learn more about our short courses, executive certificates, and custom programs for your organization.

MIT Sloan CFO Summit Attendee Discount
Receive a 15% tuition discount on MIT Sloan’s Executive Education open enrollment programs by entering Material Code: CFO2018 on the application form by 4/30/2018. Some exclusions apply.

http://executive.mit.edu/ifo
+1 867.233.7100 | infoexecutive@mit.edu
WE BELIEVE IN BUSINESS NOT AS USUAL.

You need more than a desk. You need people who fit your company. Truly enjoy what they do, and can hit the ground running. It’s time to let Robert Half help you build the productive and energized work force that can make your company even better.

The more you grow, the more we grow.

1.844.374.2467
roberthalf.com

CGMA Finance Leadership Program

Be the change finance demands. Build a team for tomorrow.

Automation and technology are changing the role of Finance. Sometimes, it’s hard to keep up. Let your team rise to the challenge and tomorrow’s business environment.

Get started now at CGMA.org/MIT

CFO THOUGHT LEADER

Instantly access hundreds of interviews with finance leaders tasked with driving change within their organizations.

Listen on Apple Podcasts
THE SMARTER ENTERPRISE leverages data, machine learning, AI, and other insightful technologies to create organizations deeply engaged with customers and other stakeholders. Smarter enterprises are culturally transformed to incorporate data-driven insights into every decision. They work collaboratively and promote talent growth, are more consumer/customer oriented and quicker at getting to market.

While many organizations have piloted insightful technologies, the challenge is to scale across the enterprise. Enterprises don’t really become smarter until they scale. Key hurdles are culture, processes and a lack of talent.

Smarter Enterprises require smarter Chief Information Officers and technologists. CIOs who not only understand the revolutionary potential of insightful technologies and how to scale them, but who can also act as cultural change agents, leading their executive business peers in transforming their organizations for competitive advantage.

Attend the MIT Sloan CIO Symposium. Connect with MIT academics, leading CIOs, senior executives, and industry experts, and peers for a day of learning and engaging. Leave prepared to lead a smarter enterprise.

FOR MORE INFORMATION
Visit www.mitcio.com or contact Lindsey Anderson via email: landerson@mitcio.com
SAVE THE DATE – 14 NOV 2019

17th Annual MIT Sloan CFO Summit