THE DURABLE CFO: Results & Reinvention
DEAR FRIENDS,

Welcome to the 17th Annual MIT Sloan CFO Summit!

Our keynote panel, LEADERSHIP IN THE DIRECT TO CONSUMER EVOLUTION, includes CFOs from Skype, Disney, and Peloton, led in conversation by Nina Ferroncino of the Wall Street Journal. These visionary leaders understand that just as consumers continue to lead our economy, so too can their companies continue to lead by focusing on their customers. You are here to be inspired by their strategies for innovating the landscape, growing market share and reimagining competitive positions.

Our breakout panels today are organized along two tracks—one track looks at RESULTS & REINVENTION: how does a CFO make tangible success in their organization; build a repeatable M&A process; plan for unforeseen scenarios; how a CFO helps the broader company negotiate for win-win outcomes; and adjust to the ever-changing workforce. The second track offers perspectives on DRIVING THE ROAD OF THE FUTURE: how a CFO makes operational changes outside the direct scope of finance; and how a CFO is impacted by the importance of data.

We are delighted to open the conference with #DURABLECFO: leaders who remain flexible, reinforce the discipline needed to stay the course. We will be impressed by their strategies for innovating the competitive position, growing market share and reinventing their respective industries. Without their support and intellectual contributions, we could not bring you this annual event, which has been recognized as the most influential conference of its kind. So, please join us in thanking all of our sponsors, our great learning sponsors: Adaptive Insights, McKinsey & Company, Silicon Valley Bank, UBS, and WilmerHale. Our silver sponsors are DSMNA, HR Knowledge, KPMG, LinkedIn, and Robert Half. And finally, MIT Sloan Executive Education is our networking sponsor.

This event would not be possible without the support of many outstanding organizations. We are also honored to be supported by a wonderful group of sponsors. The sponsorship and value of the CFO Summit attract many outstanding organizations.

Should CFOs be focused on today’s operations or tomorrow’s transformation—steady play or strategic change? Should CFOs be focused on today’s operations or tomorrow’s transformation—steady play or strategic change? We are delighted to open the conference with #DURABLECFO: leaders who remain flexible, reinforce the discipline needed to stay the course. We will be impressed by their strategies for innovating the competitive position, growing market share and reinventing their respective industries. Without their support and intellectual contributions, we could not bring you this annual event, which has been recognized as the most influential conference of its kind. So, please join us in thanking all of our sponsors, our great learning sponsors: Adaptive Insights, McKinsey & Company, Silicon Valley Bank, UBS, and WilmerHale. Our silver sponsors are DSMNA, HR Knowledge, KPMG, LinkedIn, and Robert Half. And finally, MIT Sloan Executive Education is our networking sponsor.

This event would not be possible without our wonderful team. Planning this conference is practically a year-round effort. This enables us to partner with thought leaders in their respective industries. Without their support and intellectual contributions, we could not bring you this annual event, which has been recognized as the most influential conference of its kind. So, please join us in thanking all of our sponsors, our great learning sponsors: Adaptive Insights, McKinsey & Company, Silicon Valley Bank, UBS, and WilmerHale. Our silver sponsors are DSMNA, HR Knowledge, KPMG, LinkedIn, and Robert Half. And finally, MIT Sloan Executive Education is our networking sponsor.

Thank you for attending, an exciting and educational day is ahead. Meet new people, network well, and by all means, have fun!

JEREMY SEIDMAN
MBA '03

SPONSORS
The MIT Sloan Boston Alumni Association thanks the sponsors who have helped make this event possible.
10:00 AM – 10:30 AM
Grand Ballroom
OPENING REMARKS
JEREMY SEIDMAN MBA '03
Chair, MIT Sloan CFO Summit
10:30 AM – 11:30 AM
TRACK 1: REINVENTION
Grand Ballroom
FINANCE 2.0: Building a Programmable M&A and Divestiture Strategy
JAY PARLICK
Partner, Byrne & Ryan
LEO BARTHELMES
Chief Financial Officer & Treasurer, Omnicom Group
AJAY DESAI
Senior Vice President, Chief Financial Officer & Treasurer, Verizon
SESSION 2: REINVENTION
LUNCH BUFFET
10:30 AM – 11:30 AM
Grand Ballroom
LUNCH KEYNOTE PANEL INTRODUCTION
SHEL KING
President, Chief Financial Officer, Dow
SESSION 2: REINVENTION
11:30 AM – 12:00 PM
Sponsored by MIT Sloan Executive Education
Grand Ballroom Foyer
LUNCHEON BUFFET
12:00 PM – 12:15 PM
Grand Ballroom
LUNCHEON KEYNOTE PANEL INTRODUCTION
JEREMY SEIDMAN MBA '03
Chair, MIT Sloan CFO Summit
SESSION 3: RESULTS
1:30 PM – 2:30 PM
TRACK 1: REINVENTION
Grand Ballroom
SCENARIO PLANNING: Green, Yellow & Red
GEORGE W. SHUSTER, JR.
Partner, WilmerHale
DAN ALLRED
Senior Market Manager, Silicon Valley Bank
CHRIS CASWELL
Chief Financial Officer, Welch’s
LISA DAVIDSON
Chief Financial Officer, Fractyl Laboratories, Inc.
SESSION 2: RESULTS
2:30 PM – 3:30 PM
TRACK 1: REINVENTION
Grand Ballroom
WORKPLACE FOR THE FUTURE: Reinventing Technology, Processes, and People
ASH NOAH
Managing Director, CGMA’s Learning & Educational Development, American Institute of CPAs (AICPA)
JAWAD AHSAN
MBA ’14
Chief Financial Officer, Axon
TAMMY MARTIN
Chief Financial Officer, Seeq Corporation
SESSION 2: RESULTS
3:30 PM – 4:00 PM
Grand Ballroom Foyer
COFFEE BREAK
4:00 PM – 6:00 PM
Grand Ballroom Foyer
NETWORKING RECEPTION
AGENDA
The 17th Annual MIT Sloan CFO Summit
#MITCFO
MODERATOR
The 17th Annual MIT Sloan CFO Summit

WELCOME TO MIT SLOAN 8:30 AM – 9:00 AM
GRAND BALLROOM

Social media offers a channel to connect with potential end users and encourage demand for a product or service. Dr. Sinan Aral is an expert on content, context and campaigns; impact, ideas and interests. Join us for his insights into the social dynamics of on-line influence.

MEASURING RETURNS TO SOCIAL ADVERTISING

OPENING REMARKS 8:15 AM – 8:30 AM
GRAND BALLROOM

JEREMY SEIDMAN MBA ’03
Chair, MIT Sloan CFO Summit

Jeremy Seidman 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 25-person leadership team in the Private Bank.

Mr. Seidman 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, Mr. Seidman founded the MIT Sloan CFO Summit (www.mitcfo.com), the premier forum for corporate finance executives, and continues to serve as chairperson. Mr. Seidman 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, The Wall Street Journal, and The Boston Business Journal. Mr. Seidman currently serves on the advisory boards for CoachingChange, and MIT Sloan Boston Alumni Association. Mr. Seidman, his wife, son, and daughter live in Wellesley, and enjoy skiing as often as possible at Loon Mountain in NH.

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SINAN ARAL MIT PHD ’07
Paul A. and Ruth L. Francis Professor of Management, MIT Sloan

Sinan Aral is the David Austin Professor of Management at MIT, where he is a Professor of IT & Marketing, and Professor in the Institute for Data, Systems and Society where he co-leads MIT’s Initiative on the Digital Economy.

He was the chief scientist at SocioP位于one of the first social commerce startups to compete in the so-called “Web 2.0” era, and at Huma, a social platform that the Wall Street Journal called the “first Social Operating System” that led to its sale to Twitter in 2014. He is currently a founding partner at MuscleCat Capital and on the Advisory Board of the Alan Turing Institute, the British National Institute for Data Science, in London. He was a visiting scholar at the New York Times R&D Lab in 2014, and has worked closely with Facebook, Twitter, Snap, Airbnb, Yahoo, and many other leading Fortune 500 firms on realizing business value from big data analytics, social media, and IT investments.

Professor Aral's research has been recognized with awards including the Microsoft Faculty Fellowship, the Packard Faculty Fellowship, an NSF CAREER award, and a Fulbright Scholarship. In 2014, he was named one of the “25 Most Influential Business School Professors Under 40” by Businessweek.

He is a Phi Beta Kappa graduate of Northwestern University, holds Master's degrees from the London School of Economics and Harvard University, and received his PhD from MIT.

He enjoys cooking, skiing, and telling jokes about his own cooking and skiing. His most recent hobby is learning from his four-year-old son. You can find Professor Aral on Twitter @sinanaral.

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Ned Segal, CFO of Twitter, shares Twitter’s approach to business durability: being purpose driven, customer focused, principled, and making decisions with a long term view, whether resourcing projects, making tough business decisions, or hiring people. Mr. Segal will break it down further in a conversation with Dr. Sinan Aral, MIT PhD and David Austin Professor of Management, MIT Sloan.

NER SEGAL
Chief Financial Officer, Twitter

Sinan Aral, MIT PhD ’07
David Austin Professor of Management, MIT Sloan

#DURABLECFO: Fireside Chat with Twitter’s Ned Segal
Leadership: Letters to My Younger Self

Cameron Herold
Founder, COO Alliance

Cameron Herold is known around the world as THE CEO WHISPERER. He is the mastermind behind hundreds of companies’ exponential growth. He has built a dynamic consultancy that clients have labeled a “Big Y” within every industry. He is a master at raising capital, building teams, and growing businesses from $10 million to $1 billion. His clients believe in him because he delivers results. His clients say that what they like most about him is that he is a true thought leader. They think that Mr. Herold speaks only from experience. He earns his reputation in the CEO Whisperer by guiding his clients to double their profit and double their revenue in just three years or less.

Mr. Herold was an entrepreneur from day one. At age 21, he had 14 employees. By 35, he'd helped build his first two $100 million dollar companies. By the age of 42, he engineered 1-800-GOT-JUNK?’s spectacular growth from $2 million to $106 million in revenue and 3100 employees—and he did that in just six years.

When he steps off the stage, he doesn’t stop teaching. He is the author of the global best-selling business book Double Double, in its 7th printing and in multiple translations around the world. Mr. Herold is a top-rated international speaker and has been paid to speak in 26 countries. He is also the top-rated lecturer at EO/MIT’s Entrepreneurial Masters Program and a powerhouse speaker at Chief Executive Officer and Chief Operating Officer leadership events around the world.

Cameron is known around the world as THE CEO WHISPERER. He is the mastermind behind hundreds of companies’ exponential growth. He has built a dynamic consultancy that clients have labeled a “Big Y” within every industry. He is a master at raising capital, building teams, and growing businesses from $10 million to $1 billion. His clients believe in him because he delivers results. His clients say that what they like most about him is that he is a true thought leader. They think that Mr. Herold speaks only from experience. He earns his reputation in the CEO Whisperer by guiding his clients to double their profit and double their revenue in just three years or less.

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We live where innovation lives.
Silicon Valley Bank helps founders, entrepreneurs and their investors move bold ideas forward, fast.
We support companies of all sizes in innovation centers around the world.

Contact

Jack Gaetano
Senior Market Manager
Managing Director Regional Manager

Nicole Ted Ehring
Corporate Finance

Get in touch at svb.com

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Get in touch at svb.com
There's more money on company balance sheets and private equity coffers are bigger than ever. So, how do the best companies make the most of it? How do they architect their M&A strategies to create a repeatable and systematic process that delivers high-quality results?

**Financing 2.0: Building a Programmatic M&A and Divestiture Strategy**

McKinsey & Company

**SETH BAGSHAW**
Senior Vice President, Chief Financial Officer & Treasurer, MKS Instruments, Inc.

Seth Bagshaw has worldwide responsibility for all finance, transaction, and treasury-related activities for MKS Instruments, Inc. Prior to rejoining MKS in 2018, Mr. Bagshaw served as the CFO of Mondelez, the global snacks, confectionary, and beverage company, where he oversaw the company's global finance function including M&A, information technology, facilities and global business services. Prior to Mondelez, Mr. Bagshaw was CFO of Dell. He began his career as a research analyst, serving nearly two decades in various senior finance and management positions including as President and CEO of ERF-Plastics and divisional CFO roles in the plastics and healthcare business.

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

Christopher Montgomery joined UBS in 2016 and leads the UBS American Software practice. Previously he was a Senior Vice President with J.P. Morgan, and prior to that was responsible for supply and demand management for servers and workstation processes for Intel Corporation.

Mr. Montgomery has more than 15 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 broader Technology sectors. He has advised a broad range of clients across application, infrastructure and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and broader Technology sectors. He has advised a broad range of clients across application, infrastructure and broader Technology sectors.

Mr. Montgomery received a B.S. in Business Administration from Mercer University. He is also an Operating Partner in the Portfolio Group and a Senior Vice President of Financial Services, Americas Software practice. Previously he was a Senior Vice President of Financial Services, Americas Software practice. Previously he was a Senior Vice President of Financial Services, Americas Software practice.

**KEN STILLWELL**
Senior Vice President, Chief Financial Officer & Chief Administrative Officer, Pegasystems Inc.

Ken Stillwell has more than 20 years of financial leadership experience. Since 2006, he has held senior roles in the Technology sector. He joined Pegasystems Inc. from Sony, where he served as Senior Vice President and Chief Financial Officer. At Sony, he oversaw the global financial functions with a focus on the then-new role of Chief Financial Officers, as well as overseeing non-financial functions such as HR, IT and Legal. He was also responsible for the Sony Digital Network Integration Corp. (DNIC), a financial and compliance software as a service (SaaS) company in Boston, where he managed several operational functions in addition to his duties as CFO. Mr. Stillwell also brings the peace of mind that the financial leadership experience he gained from his time at Sony brought to the company as he served on the Board of Directors of Mondelez International, a non-profit organization.

Mr. Stillwell received his B.S. in Business Administration from the University of South Carolina, where he earned his undergraduate degree in business/economics, and the University of South Carolina, where he earned his master's in accounting and finance. He is a certified public accountant and based in Pegasystems Inc.'s Cambridge, MA headquarters.

Mr. Stillwell joined Pegasystems Inc. in 2016. Since joining Pegasystems Inc. in 2016, Mr. Stillwell has been helping lead the organization through a major business transformation as the company has moved from a majority on-premise model to an “as-a-service” model of running software. This includes leveraging market opportunity and dynamics, educating internal and external stakeholders, while improving communications with investors about the impact.

He is a graduate of the University of Pittsburgh, where he earned his undergraduate degree in business/economics, and the University of South Carolina, where he earned his master’s in accounting and finance. He is a certified public accountant and based in Pegasystems Inc.'s Cambridge, MA headquarters.

**BRIAN GLADDEN**
Managing Director, Head of Software, Americas, UBS

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Negotiations are an ongoing factor in business success. Whether the goal is reaching agreement, driving the business forward, or ensuring forward progress, a comprehensive understanding of negotiation strategies can help the team bring new ideas to the table and win against the odds. Our distinguished panel of experts has an extensive track record of negotiating with low female representation. This includes co-founder of Women Leading the Way,” the High Liner Foods diversity program focused on demonstrating by her development of “Women Leading the Way,” the High Liner Foods diversity program focused on women and ensuring forward progress.

We have panelists on hand to help make the case for women in leadership roles in an industry with low female representation. They have been instrumental in helping to grow the company’s OfficeTeam, Accountemps, Robert Half, and have a long history of service and leadership in finance, accounting, and human resources. Steve Webber leads Carbon Black’s finance and administration team, bringing more than 25 years of finance management and executive leadership, most recently as Chief Operating Officer and Chief Financial Officer of BackOffice Associates. He holds a Bachelor of Science degree in mechanical engineering from the University of Idaho and an MBA in finance and supply chain management from Syracuse University.

Lucy McQuillen is Chief Financial Officer at WHOOP™, where she has been an integral part of the leadership team that led the company to $800M in annual revenue in just 2 years. She is known for her strategic expertise in finance, operations, and human resources, including leading the team that led the sale to Hologic. Ms. McQuillen holds a B.S. degree in Electrical Engineering from the University of Virginia and has an MBA from the F.W. Olin Graduate School of Business at Babson College.

Robert Nealon is the District President for Robert Half, the world’s first and largest professional staffing firm. In his role, he is responsible for overseeing Professional Staffing Staffing, Accounting, and Finance, and has direct reporting responsibility to the CEO. Mr. Nealon spent 19 years at CMC Corporation and was promoted to leadership positions of increasing responsibility, including corporate controller, international finance and business partner roles supporting the Enterprise Software Business and Global Services, IT and the Finance function and was part of the team that led the sale to Hologic. He joined Robert Half in 1990 as the company’s OfficeTeam, Accountemps, Robert Half Financial Accounting and Management Services, and recently as Chief Operating Officer and Chief Financial Officer of BackOffice Associates. He holds a Bachelor of Science degree in mechanical engineering from the University of Idaho and an MBA in Finance and supply chain management from Syracuse University.

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Consumers are more connected and more demanding than ever before. As the direct-to-consumer model continues to explode, companies face more options too, such as how the optimal number of SKUs is, and frequently technology is updated, what to face more options too, such as how.

**LEADERSHIP IN THE DIRECT-TO-CONSUMER EVOLUTION**

**DALTON PERRAS**
Associate Director, Corporate & Audience Marketing, MIT Sloan Executive Education

Dallan Perras is Associate Director, Corporate & Audience Marketing at the MIT Sloan School of Management’s Office of Executive Education. He helps develop, design, and deliver innovative executive education programs for individuals and companies. He brings over twenty years of experience in corporate marketing in the energy and technology sectors, ranging from strategy negotiations in the extraction industries in the Persian Gulf, as an expert in the deregulation of the electric power sector in North America, and in startup environments, most recently with the commercialization of a nanotechnology for the refining and water purification sectors. Mr. Perras holds a BA from Boston College and an MBA from Georgetown University.

**JUNA TRENTMANN**
News Editor, CFO Journal, The Wall Street Journal

Junu Trentmann is a News Editor at CFO Journal, the Wall Street Journal’s corporate finance group. She joined the publication over a decade and includes coverage of the banking, accounting and technology sectors in the U.K., Germany and China. Prior to her role at the Wall Street Journal, she worked for the German media group Axel Springer in London, Berlin and Shanghai. Ms. Trentmann studied at Birkbeck University in London, Management University in the U.S., the London School of Economics (LSE) in the U.K. and Peking University in China and she’s previously working with Axel Springer Austria/MTI/WSJ in Berlin.

**LAVANYA CHANDRASHEKAR**
Chief Financial Officer, Diageo North America

Lavanya Chandrashekar Chapek is Chief Financial Officer for Diageo North America where she sets and oversees Diageo’s financial strategy across the United States and Canada. Ms. Chandrashekar is a highly strategic leader, with a passion for developing people and ideas. With a career spanning many years, she is known for both her results-oriented approach and ability to drive transformational change, across multiple markets and geographies. She started her career at Morgan Stanley, where she worked for more than fifteen years supporting the organization’s finance functions across a global portfolio of identified brands. Prior to Diageo, Ms. Chandrashekar was CFO of Metrovick International’s North America business, where she spent more than five years supporting the organization’s finance functions across a global portfolio of recognized brands. Prior to Diageo, Ms. Chandrashekar was with Procter & Gamble, where she spent nearly 20 years in leadership positions in finance, operations, and technology across competitive regions including New York, Los Angeles, London and Sydney. She is a graduate of MIT, where she earned a Bachelor’s degree in Economics.

**RACHEL GLASER**
Chief Financial Officer, Etsy

Rachel Glaser is Etsy’s CFO, bringing more than 30 years of senior financial experience to Etsy. She’s responsible for overseeing our global financial operations. Ms. Glaser joins Etsy from Lord Group, where she served as CFO since 2016. While at Lord Group, she led initiatives that strengthened operating efficiency and helped the company through a transformative period and return to growth. Prior to joining Lord, she was CFO at Moen, Inc. and helped lead a successful sale of the company to New Corporate. Ms. Glaser has also held senior roles in Corporate Finance at Walmart and as the CFO at Walt Disney Company, where she spent nearly 20 years in leadership positions in finance, operations, and technology across competitive regions. Ms. Glaser was elevated to the Board of Directors of The New York Times Company in 2019.

**JILL WOODWORTH**
Chief Financial Officer, Peloton

Jill Woodworth joins Peloton with 20+ years of experience in the finance world, to fill the role as CFO at J.P. Morgan. Most recently, she led J.P. Morgan’s disruptive commerce group, a joint venture designed to bridge the gap between technology and retail/direct coverage. As a Managing Director within the investment bank, Ms. Woodworth headed the retail sector and below that, ran equity capital markets origination for the retail and consumer products companies. During her time in the leading financial institution, Woodworth worked closely with clients including Shake Shack, Planet Fitness, Dunkin’ Brands, and Michael’s. Prior to J.P. Morgan, she began her career in investment banking with Morgan Stanley where she held various positions within equity capital markets and client coverage across competitive regions including New York, Los Angeles, London and Sydney. She is a graduate of MIT, where she earned a bachelor’s degree in Economics.
George Shuster’s practice focuses on the areas of intellectual property, business and corporate law, secured and unsecured debt finance, mergers and acquisitions, and venture capital. He represents creditors, lenders, bondholders, manufacturers, financial organizations and many other parties. Mr. Shuster represents creditors, lenders, bondholders, manufacturers, financial organizations and many other parties. He has extensive experience and knowledge in a wide range of bankruptcy, insolvency risk mitigation, out-of-court restructurings, acquisitions and mergers, and reorganized finance and broader teams to ensure effective collaboration and implementation. In order to drive execution he has created appropriate metrics and reporting and is adept at effectively communicating a consistent message to Boards of Directors, executive leadership, external parties, as well as the general employee population.

His experience includes significant financial and operational transformations, international expansion and management, M&A execution and post-close integration, operational transformation, and strategic growth, scalability and outsized success in a competitive, global environment. Having worked for SVB since 2002, he has had the privilege to work with and learn from founders, entrepreneurs and executives whose companies are impacting the world in innumerable ways.

Below SVB Georges began his 2007 to build their Acrobat creation team, Dan Allred led up to today, is helping to build the community and life science ecosystem. He received his bachelors degree from the University of North Carolina at Chapel Hill where he graduated as a leader of the Phi Beta Kappa Society. He is a graduate of National Louis University and has attended executive programs at Wharton and Brandeis. He has extensive experience in managing capital, and managing out-of-court restructurings and debt finance transactions. With his business experience and knowledge of a wide range of transactions, Mr. Shuster is able to effectively represent the interests of a diverse community of clients, including public and private technology companies, real estate developers, manufacturers, financial organizations and many other entities.

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For companies big and small, operations can too easily get bumped to the bottom of the list until problems emerge. Hear how these CFOs ensure consistency and reliability across internal and external facing operations including everything from internal and external facing operations including everything from

10:30 AM – 11:30 AM

EXECUTIVE OVERVIEW:

PRIORITY: OPERATIONAL EXCELLENCE

AVNER APPLBAUM
Chief Financial Officer, Double E Company, LLC

Aver Applbaum is the Chief Financial Officer of Double E Company, LLC, which is a private equity-backed global manufacturer of web handling equipment. Mr. Applbaum is responsible for finance, operations and business partnering skills. He is passionate about creating shareholder value through continuous improvement, operational excellence and transformation of the finance function from back-office providers of accounting services to front-facing strategic and expert advisors to the business. Previously Mr. Applbaum held several CFO roles for private equity-backed companies where he led acquisitions and operational transformation. He established and implemented operational metrics, KPI’s and dashboards, driving growth and maximizing EBITDA. Mr. Applbaum is also responsible for the Company’s operations and business partnering skills. He is passionate about creating shareholder value through continuous improvement, operational excellence and transformation of the finance function from back-office providers of accounting services to front-facing strategic and expert advisors to the business.

ANHANDA DUGUAY
Chief Financial Officer, Profitect (new part of Zebra Technologies Corp.)

Amanda Deguglia leads strategic and tactical initiatives, as well as all financial operations for Profitect Inc., a proactive analytics SaaS solution company serving small businesses. She played a critical role in the company’s acquisition process by Zebra Technologies Corp. As a Finance Business Partner reporting to senior management and operations executives, Mr. Deguglia also led multiple financial and operational integrations for newly acquired entities. With Parexel, she had the honor of participating in the WISDOM program (Women Inspiring Success & Driving Opportunities in Management), and she also experience as an assurance professional as part of her firm’s Boston office. Previously Mr. Deguglia held several CFO roles for portfolio companies where he led acquisitions and operational transformation. He established and implemented operational metrics, KPI’s and dashboards, driving growth and maximizing EBITDA. He also brings over 15 years of senior financial and operational roles in publicly traded global manufacturing companies. During that time Mr. Deguglia successfully integrated over 10 companies and consistently delivered performance improvements, profit growth and increased cash flow.

SARAH ROMANO
Chief Financial Officer, EyeGate Pharmaceuticals

Sarah Romano joined EyeGate Pharmaceuticals as Corporate Controller in 2020 and was appointed Chief Financial Officer in January 2023. Since joining the Company, she has been responsible for the Company’s accounting, tax, financial reporting, and internal controls. Prior to joining EyeGate, Ms. Romano served as Associate Controller at Teligent and Corporate Controller at Bowdoin Group, a healthcare-focused executive recruiting firm. Previously, she held several internal audit reporting positions of increasing responsibility at BlueShield of California until its acquisition by UnitedHealth in 2013, and was Senior Financial Reporting Analyst at Cogent Corporation, a publicly traded company, prior to joining the financial reporting team. Ms. Romano is a CPA and holds a Bachelor’s degree in Finance and a Master’s degree in Accountancy from Boston College. She also holds a Bachelor’s degree in Accounting and Cross and Murrays of Accounting from Boston College.

REBECCA MORRISON
Vice President of Finance and Operations, Lola.com

Rebecca Morrison is Vice President of Finance and Operations at Lola.com, Agile Travel Management. Previously, she was Vice President, Global Finance and Operations at Malwarebytes, a leader in threat and acquisitions (M&A) software. In her time there, she oversee all back-office operations including Finance, Operations, HR, and Admin. Prior to that, Ms. Morrison spent four years at Hilton holding various roles with the Sales Strategy and Operations team, as well as the Finance organization. Prior to that time at Hilton, she spent nine years in various finance and operations roles of EMC and RSA, the Security Division of EMC, including a three-year stint in Singapore. Ms. Morrison earned her Bachelor of Arts in Accounting from College of the Holy Cross and a Master of Arts in Accounting from Boston College.

KEN BETTERHAUSER
President & Managing Director, HR Knowledge

Ken Betterhauser is one of the founders of HR Knowledge. Mr. Betterhauser earned his BBA from Bentley, and has been involved with the company since its inception. With over 30 years of experience as a business leader, Mr. Betterhauser provides the foundation to steer the company's growth and evolution.

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JANAD AHANS MBA ’14
Chief Financial Officer, Axon

Mr. Noah joined the Association in 2012, and prior to that for their organizations in the digital age.

Ash Noah, CPA, CGMA, FCMA, is Managing Director, CGMA’s Learning & Educational Development, American Institute of CPAs (AICPA). He is a Fellow of CIMA. He is also an avid aviator, and is based in Cambridge, Massachusetts. Mr. Noah holds an MBA from the MIT Sloan School of Management and a BA in Economics from the College of the Holy Cross.

ASH NOAH
Managing Director, CGMA’s Learning & Educational Development, American Institute of CPAs (AICPA)

TANNY MARTIN
Chief Financial Officer, Son Corporation

Tanny Martin leads the Son’s worldwide financial, accounting and human resource operations, including financial systems, investor relations, people, acquisition and partnership, and global expansion. She participates in the organization’s fundraising and due diligence activities, as well as monitors and updates the fiscal organization in preparation for an IPO. Ms. Martin deployed an automated financial reporting technology solutions to efficiently scale the finance office and easily integrate with other systems while saving time and money. Ms. Martin is a recognized thought leader on directing a diligenced software.

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JANAD AHANS MBA ’14
Chief Financial Officer, Axon

As a Principal in KPMG’s Advisory Services practice, Mr. Metter focuses on business transformation, operational excellence, cloud technologies, HR strategy and service delivery. He supports his clients through broader business transformations by focusing on enhancing the effectiveness of the HR function. He is responsible for the HR strategy and vision, HR service delivery design and execution and HR technology selection and implementation.

EVAN NETTER
Principal, KPMG US

Shah Naib, PhD
President, Naibac

TANNY MARTIN
Chief Financial Officer, Son Corporation

Dr. Shah Naib is an entrepreneur and consultant on international expansion. He founded Naibac, an international business enterprise with about 1200+ employees in offices in 6 countries before selling the entire business to Private Equity in 2013. He was the first to develop and operate a moder user-friendly providing one-stop shopping for small and medium sized US technology companies seeking international recognition. In the process he has worked with many companies in their early stages who have since become household names such as Tesla Motors, FaceTime and Sonus Networks.

EVAN NETTER
Principal, KPMG US

TANNY MARTIN
Chief Financial Officer, Son Corporation

Mr. Ahsan gained substantial international experience at GE, most notably serving as CFO for GE Healthcare’s electronics business and leading a successful IPO for the business.

JAWAD AHSAN
Chief Financial Officer, Axon

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VIVEK F. FARIA
Patrick J. McGovern Professor of Operations Management, MIT Sloan

Vivek Faria is the Patrick J. McGovern (1959) Professor and the Robert M. Anderson Professor of Management at the MIT Sloan School of Management. His research focuses on the development of new methodologies for large-scale dynamic optimization under uncertainty, and the application of these methodologies in the design of revenue management strategies spanning various industries ranging from airlines and retail to online advertising. Professor Faria is a winner of the 2004 INFORMS FINANCIAL ENGINEERING STUDENT PAPER AWARD for a research paper, ‘Managing the interface between the firm and the financial markets: A microeconomic framework for valuing high-frequency algorithmic trading strategies.’ He holds a B.S. in computer engineering from the University of Arizona, and a PhD in electrical engineering from MIT.

MARY JEFTS
Chief Financial Officer, Salsify

As Chief Financial Officer of Salsify, Mary Jefts leads Salsify’s financial, business operations and administrative functions. She has over 25 years of financial and executive leadership experience at both public and private companies in the technology space.

KERNER LAI
Vice President of Finance, Adaptive Insights

Kenneth Lau has a broad finance management background, spanning corporate FP&A, sales and R&D finance, systems, and business intelligence. In his current role as Vice President of Finance at Adaptive Insights, he oversees FP&A and regularly speaks and writes about FP&A best practices.

Mike Mozzer is TraceLink’s Chief Financial Officer, responsible for the company’s global financial strategy. A seasoned financial executive of more than 25 years, he started his career in the Boston office of Coopers and Lybrand and has extensive experience with emerging high-technology and high-growth companies. He joined TraceLink in 2009 as a founding team member, and served as Senior Vice President of Finance, Strategy and Analytics for both the Red Sox and Fenway Sports Management (FSM).

Tim Zue is responsible for the financial management of the Boston Red Sox and Fenway Sports Group, including budgeting, accounting, financial planning, forecasting, and business analysis. Prior to joining the Red Sox in 2016, he served as Senior Vice President of Finance, Strategy and Analytics for both the Red Sox and Fenway Sports Management (FSM). During his 27-year career with the club, he has played a key role in all financial aspects of the business, including the evaluation and execution of all baseball-related, major league, and non-major league activities for sales of venture-backed companies to public company acquirers. She held a Business Unit Executive role in the technology space.
There’s no shortage of courses out there that promise to help you build a finance career. However, the vast majority of these courses are taught by people who’ve never actually advanced into the CFO office.

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ACCOUNTING & FINANCE • ADMINISTRATIVE • LEGAL • TECHNICAL • CREATIVE & MARKETING
Ted Tobiason is Lime’s first-ever Chief Financial Officer. Prior to Lime, he was Managing Director in Technology Equity Capital Markets at Morgan Stanley. While at Morgan Stanley, he led the Private Placements Team since 2015. From his over two decades of financing technology companies, Mr. Tobiason brings with him a wealth of public equity transaction experience gained from extensive work with notable companies including Airbnb, Solarwinds, Uber, Cruise Automation, Sofi, Trulia, Chargepoint, and Twitter.

Before that, he spent eight years as Head of Technology ECM at Deutsche Bank and served as a senior research analyst concentrating on the technology sector for Cypress Funds.

Mr. Tobiason holds an MBA from Columbia Business School and an AB from Princeton University.

Geoff Richardson is the Chief Financial Officer at Cruise. He is responsible for leading financial operations, strategic transactions, operations, new business initiatives, and cost optimization strategy. He brings over 20 years of international finance and operations experience, including strategy development and execution, fundraising, mergers and acquisitions, risk management, accounting, tax, and investor relations.

Geoff Richardson was previously Chief Financial Officer at Illumina Technologies, a next-generation, dynamic glass company. While there, he scaled the company from the R&D phase to product manufacturing.

Earlier in his career, he spent more than a decade in a variety of capital markets and investment banking roles with Goldman Sachs and Morgan Stanley. Mr. Richardson was also an attorney with Shearman & Sterling prior to switching to banking.

Christopher Knittel is the George P. Shultz Professor of Applied Economics at MIT Sloan School of Management. He is also the Director of MIT’s Center for Energy and Environmental Policy which is dedicated to the development of energy and the environment. Professor Knittel is also the Co-Director of the MIT Energy Institute’s Electric Power Systems Laboratory. Prior to joining the faculty at MIT in 2011, having previously held a faculty position in the Business and Public Policy Department at UC Berkeley, Professor Knittel was a research associate at the Energy Project, a research initiative that focuses on energy and the environment. Professor Knittel received his B.A. in economics and political science from the California State University, Stanislaus in 1994 (summa cum laude), an M.A. in economics from UC Berkeley in 1996, and a Ph.D. in economics from UC Berkeley in 1999. His research interests are in understanding how consumers and firms respond to changes in the energy environment, in energy economics, and in energy policy evaluation. His research has appeared in leading academic journals, including the American Economic Review, the Journal of Political Economy, the Quarterly Journal of Economics, the Journal of Public Economics, and the Journal of Environmental Economics and Policy.

Enjoy the view from the passenger seat with these Chief Financial Officers as they share their perspectives on the future of transportation including autonomous driving, micro-mobility electric scooters, and bike sharing. Join us for a conversation including how technology, data and innovation are coming together as we journey the road of the future.

Christoph Knittel

Geoffrey Richardson

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