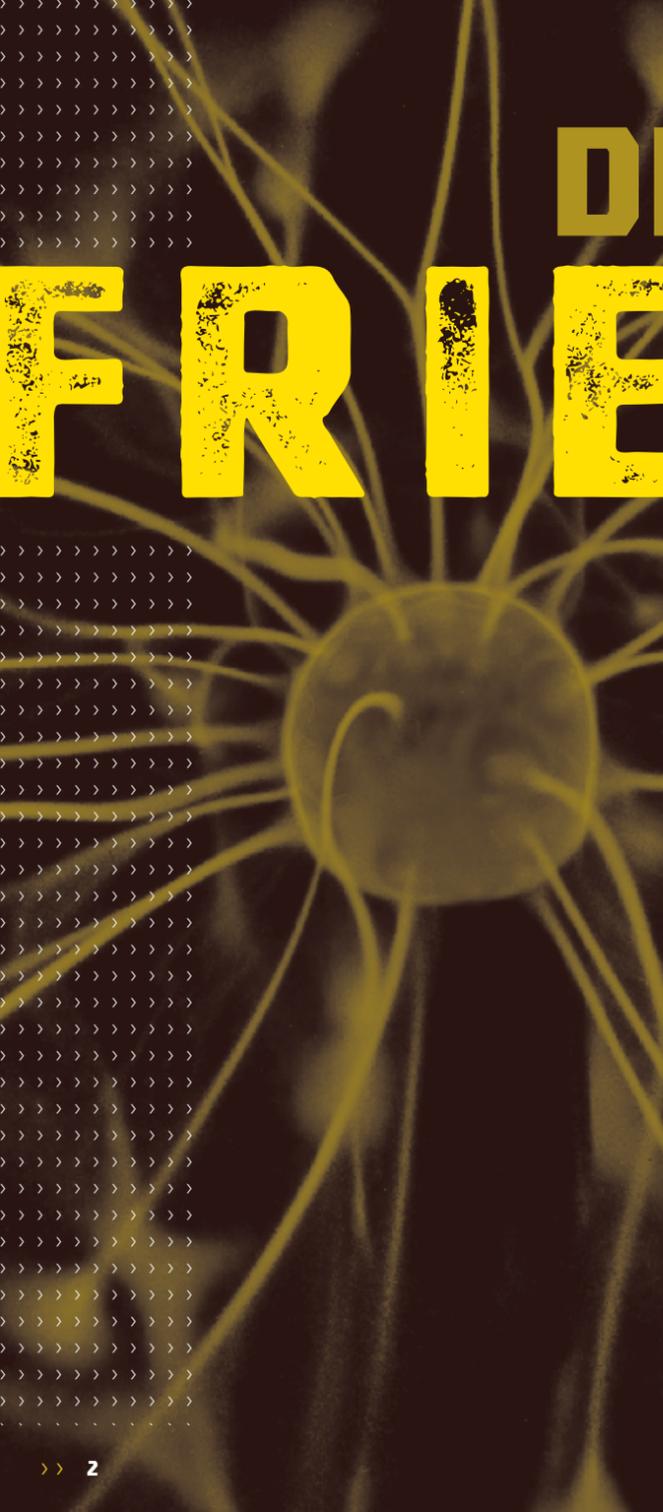


THE 16TH ANNUAL
MIT SLOAN
CFO SUMMIT
11.15.2018



POWER

: A CFO'S BOLD MOVES



DEAR FRIENDS,

A BOLD AND POWERFUL WELCOME TO THE 16TH ANNUAL MIT SLOAN CFO SUMMIT!

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 a bold path forward.

Which brings us to our theme, **"Power: A CFO's Bold Moves."** Bold moves include those that move a company forward, as well as those that enthuse the organization and enforce the discipline to stay the course.

We are delighted to open the conference with **Better Decisions Through Bolder Questions** with Hal Gregersen, Executive Director, MIT Leadership Center and Author of *Questions are the Answer*. Hal's research has shown that although CFOs are expected to have all the answers, first they have to ask the best questions. We also look forward to **Bold Font: Fireside Chat** with Hal and Adobe CFO John Murphy, exploring the company's transformation from desktop file manager to cloud-enabled intelligent document management solutions.

Everyone has a Story, with JT McCormick, President & CEO of Scribe Media, is our morning keynote. He'll share the bold decisions that led him from the housing projects of Dayton, OH to success in both business and investing.

Our keynote panel, **Chutzpah in the CFO Suite: Bold Decisions, Actions and Outcomes**, includes CFOs from DocuSign, IAC and SiriusXM, led in conversation by Kimberly Johnson of the Wall Street Journal. These visionary leaders understand that bold calls are a fundamental imperative for today's business leaders. You are sure to be impressed by their strategies for innovating the landscape, growing market share and reinventing competitive position.

Our breakout panels today are organized along two tracks—one track looks at **Process**: how does a CFO lead long-term strategy; adopt a digital strategy; and evaluate technological trends. The other track offers perspectives on **People**: when and how does leadership mean making an audacious decision to sell a business; how is the CFO role impacted by flatter organizations, multi-generational workforce and shortened tenures; and the role of the CFO in building a team for strategic and operational success.

We'll end the formal portion of our conference on a high note (get it?) with **The Business of Cannabis**. Moderator Scott Stern, Professor of Management, MIT Sloan, will lead a conversation with the CFOs of Tilray and Canopy Growth Corporation. With marijuana increasingly deregulated, the business of cannabis offers a bold new promise. This fireside chat will include a look at cannabis science and technology, policy changes, and new market opportunities.

After this discussion, you are sure to have the munchies. Please join us as we close out the conference with our **Networking Reception**. Power over to the reception for a bold hello to new names and old friends over drinks, heavy appetizers and light dessert.

This event would not be possible without the CFOs on our volunteer team. Planning this conference is 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.

We are also fortunate to be supported by a great group of sponsors. As the CFO Summit's reputation has expanded, many outstanding organizations wish to be involved. This enables us to partner with thought leaders in their respective industries. Without their financial 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 our gold level sponsors IBM, McKinsey & Company, Oracle/NetSuite, Silicon Valley Bank and UBS. Our silver sponsors are CGMA, HR Knowledge, KPMG, Nixon Peabody and Robert Half. They are joined by MIT Sloan Executive Education as our networking sponsor.

Thank you for attending; a great day is ahead. Learn much, network well, and have fun! Prepare to boldly go where no CFO has gone before.



JEREMY SEIDMAN
Chair, MIT Sloan CFO Summit

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- Jeremy Seidman MBA '03**
Chair, MIT Sloan CFO Summit
- Kristin Todd**
Marketing Director, MIT Sloan CFO Summit

7:30 AM – 8:15 AM

GRAND BALLROOM FOYER
REGISTRATION AND CONTINENTAL BREAKFAST

8:15 AM – 8:30 AM

GRAND BALLROOM
OPENING REMARKS

Jeremy Seidman MBA '03
Chair, MIT Sloan CFO Summit

8:30 AM – 9:00 AM

WELCOME TO MIT SLOAN — GRAND BALLROOM
BETTER DECISIONS THROUGH BOLDER QUESTIONS

Hal Gregersen
Executive Director, MIT Leadership Center

9:00 AM – 9:30 AM

MORNING FIRESIDE CHAT — GRAND BALLROOM
BOLD FONT: FIRESIDE CHAT WITH JOHN MURPHY

Hal Gregersen
Executive Director, MIT Leadership Center
John Murphy
Executive Vice President and Chief Financial Officer, Adobe

9:30 AM – 10:00 AM

MORNING KEYNOTE — GRAND BALLROOM
EVERYONE HAS A STORY

JT McCormick
President & CEO, Scribe Media

10:00 AM – 10:30 AM

GRAND BALLROOM FOYER
MORNING COFFEE BREAK

10:30 AM – 11:30 AM

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

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

Peter Hirst
Associate Dean, MIT Sloan Executive Education

12:15 PM – 1:15 PM

LUNCHEON KEYNOTE PANEL — GRAND BALLROOM
CHUTZPAH IN THE CFO SUITE: BOLD DECISIONS, ACTIONS AND OUTCOMES

Kimberly Johnson
Professional Products Editor, The Wall Street Journal

David Frear
Senior Executive Vice President and Chief Financial Officer, SiriusXM

Glenn Schiffman
Chief Financial Officer, IAC

Michael Sheridan
Chief Financial Officer, Docusign

1:30 PM – 2:30 PM

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

Dr. Shan Nair
President, Nucleus

Amit Singh
Chief Operating and Financial Officer, Piston Group

2:30 PM – 3:30 PM

TRACK 1: PROCESS — GRAND BALLROOM
BLOCKCHAIN: BRILLIANT OR BANDWAGON?

Silvio Micali
Professor, MIT Computer Science and Artificial Intelligence Laboratory (CSAIL)

Julia Abramovich MBA '02
Vice President of Sales, IBM

David Garrity
Co-Founder and Partner, BTblock and Independent Director, BTCs

Naeem Ishaq
Chief Financial Officer, Treasurer & Executive Vice President, Risk, Circle

Steven Pipp
Research Manager, Silicon Valley Bank

TRACK 2: PEOPLE — SALONS FGH
BOLD THAT TEAM: BEYOND HR

Dan DeNisco
Senior Vice President, Robert Half Management Resources

Bob Cruickshank
Chief Financial Officer, ezCater

Craig Driscoll
Partner, Highland Capital Partners

Nicole Heifner
Chief Financial Officer, Accent Therapeutics

Frank Smalla
Treasurer & Chief Financial Officer, Boston Beer

3:30 PM – 4:00 PM

GRAND BALLROOM FOYER
COFFEE BREAK

4:00 PM – 4:45 PM

AFTERNOON KEYNOTE — GRAND BALLROOM
THE BUSINESS OF CANNABIS

Scott Stern
Professor of Management, MIT Sloan

Mark Castaneda
Chief Financial Officer, Tilray

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

4:45 PM – 6:15 PM

GRAND BALLROOM FOYER
NETWORKING RECEPTION

#MITCFO

MODERATOR

AGENDA

WELCOME

8:15 AM – 8:30 AM
GRAND BALLROOM

OPENING REMARKS



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 14-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, Wall Street Journal, and Boston Business Journal. Mr. Seidman currently serves on the advisory boards for Coaching4Change, 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.



HAL GREGERSEN

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

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 ground-breaking leaders

BETTER DECISIONS THROUGH BOLDER QUESTIONS

8:30 AM – 9:00 AM
GRAND BALLROOM

WELCOME TO MIT SLOAN

like Amazon's Jeff Bezos and P&G's A.G. Laffey, 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

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.

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.

9:00 AM – 9:30 AM
GRAND BALLROOM

MORNING FIRESIDE CHAT

BOLD FONT: FIRESIDE CHAT WITH ADOBE'S JOHN MURPHY



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 his 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 Nestlé and began his professional career at PWC.

He has an MBA from the University of Southern California's Marshall School of Business and a BS in Accounting from Fordham University and is a licensed CPA (inactive).



HAL GREGERSEN

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

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.



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UBS is proud to sponsor the 16th annual MIT Sloan CFO Summit. We believe investing in learning and thought-provoking discourse about the future of finance, accounting 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

Managing Director—Wealth Management
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JT MCCORMICK

President & CEO, Scribe Media

JT 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 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.

EVERYONE HAS A STORY

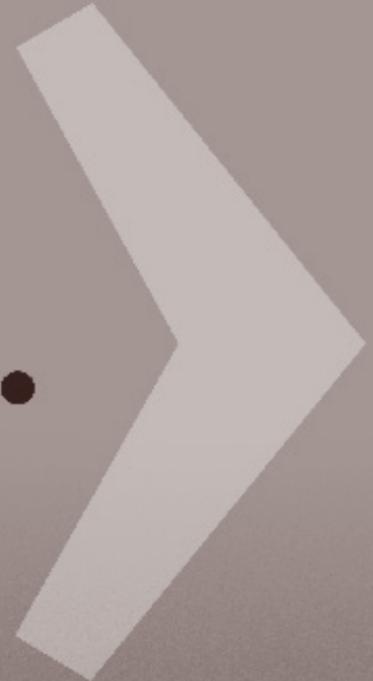
JT MCCORMICK IS THE AUTHOR of *I Got There: How I Overcame Racism, Poverty and Abuse to Achieve the American Dream*. Mr. McCormick will share the powerful lessons and bold decisions that lead him from the poorest housing projects of Dayton, Ohio to success in both business and investing.

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Contact:
Jack Gaziano
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Market Manager, Boston Tech Banking
dallred@svb.com

STRATEGY BEYOND THE HOCKEY STICK

WE HAVE ALL SEEN strategic plans with “hockey stick” revenue projections. How does a CFO determine which financial projections are credible, and then take the bold action to help these plans turn to reality (or redeploy resources as needed to more productive initiatives)? An elite group of CFOs will discuss how financial leaders balance risk and rewards in a way that results in sustainable long-term growth.



DIANE BASILE

Chief Financial Officer, CFA Institute

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 Intronis, Inc., as well as vice president of finance in Nuance Communications’ Healthcare Division.

In addition, she has held finance positions at Fidelity Investments, Merrill Lynch & Co., PerkinElmer, and Digital Equipment. She is a member of the Boston Security Analysts Society. Ms. Basile holds a master’s degree in finance from Boston College and a BS degree in economics from The Wharton School of the University of Pennsylvania. She earned the CFA charter in 2007.



JUSTIN CROTTY

Chief Financial Officer, Anaqua

As the Chief Financial Officer for Anaqua, Justin Crotty oversees global finance and accounting, as well as M&A strategy and functional areas including human resources, legal, sales operation and cloud hosting. Mr. Crotty joined Anaqua in 2016 from Oliver Wyman where he was a partner advising private equity and strategic clients on growth and M&A initiatives involving software, information and services businesses. Prior to his leadership roles in strategy consulting, he worked in private equity, investment banking, corporate development and technology consulting, and has experience working in the US, Europe and Asia. He holds a bachelor’s degree with honors from Brown University and an MBA from the Kellogg School of Management at Northwestern University where he was a Citigroup Scholar.



ROBERT GIBNEY

CFO, Monster.com

As Chief Financial Officer for Monster, Robert Gibney drives the global financial strategy for the business, including acquisition programs, capital allocation, and operational KPIs. He is passionate about leading business transformation to drive long-term growth, and is focused on steering the company financially in order to bring greater value to customers and candidates.

Mr. Gibney came to Monster in May 2017, intrigued by the opportunity to join a respected brand in an industry that is experiencing significant transformation. Before joining Monster, he served as Chief Financial Officer for various divisions of Thomson Reuters, most notably Thomson Reuters Tax & Accounting, which was experiencing a similar shift in its industry. The strategy was to create a software, service and content solution business to meet the needs of Tax and Accounting professionals. The business tripled in size and profitability, while ROI reached the high teens, during his tenure. He credits a former boss and colleagues for helping him develop a leadership style that is fact based and transparent, while consistently demanding results and leading with compassion.

Mr. Gibney is a CPA and has an MBA from the University of Connecticut. He also holds a degree in international finance from the University of Connecticut.



KENNETH GOLDMAN

Senior Vice President and Chief Financial Officer, Everbridge, Inc.

Ken Goldman brings over 35 years of experience building finance and technology organizations to his role as Senior Vice President and Chief Financial Officer at Everbridge. A former recipient of Boston Business Journal’s “CFO of the Year” award, Mr. Goldman’s financial and operational leadership experience supports Everbridge’s accelerated growth.

Mr. Goldman’s career spans extensive expertise in finance, administration, corporate strategy and operations, including leadership roles with three public companies including successful IPO and secondary capital raise experience. Prior to Everbridge, Mr. Goldman served as Executive Vice President and CFO at Fiksu, a Boston-based provider of mobile application marketing products. He was also EVP and CFO Black Duck Software, and prior to that, served as SVP & CFO and Member of the Board of Directors for Salary.com.

Before Salary.com, Mr. Goldman held CFO and executive positions for Lodestar Corporation, Student Advantage, MediaMap, Shoplink.com, Liberty Mutual and Goldweitz & Company, Inc. A CPA, Mr. Goldman began his financial career at KPMG. He is a graduate of the Syracuse University Martin J. Whitman School of Management.



WERNER REHM

Partner, McKinsey

Werner Rehm is a corporate finance expert partner in McKinsey’s New Jersey office. He is one of the leaders of the Strategy Analytics Center, guiding McKinsey’s center of competence for financial and capital markets analysis, M&A, and valuation. Mr. Rehm also leads McKinsey’s work in investor relations and investor communications.

He advises teams and clients on in-depth financial analyses, corporate and business unit valuation, M&A, capital structure, dividend policy, investor relations, and Capital Market Diagnostics in order to identify, value, and prioritize corporate strategies. Mr. Rehm works across all sectors and has deep experience in the high tech, industrial, transportation, and pharma areas.

Beyond his direct client work, Mr. Rehm is a leader for many of McKinsey’s corporate finance trainings. He has written extensively on value creation, investor relations, and M&A. He is a member of the editorial board for McKinsey on Finance, the firm’s quarterly publication on corporate finance topics, and occasionally hosts the McKinsey on Finance podcast.

Mr. Rehm was born and raised in Germany and has worked in multiple McKinsey offices since joining the firm in 1995, including Berlin, Frankfurt, Boston, and New York.

WHEN BOLD MEANS SELL

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.



THOMAS BLESSO MBA '09

Chief Financial Officer, Penn Foster Education Group

Tom Blesso is the Chief Financial Officer of Penn Foster Education Group, a digital learning and talent development solutions company. He has a proven track record executing profitable growth strategies and he 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 finance 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.

Mr. Menard comes from Cayan LLC where he was responsible for overseeing the organization's finance and accounting functions, in addition to human resources and corporate development. Prior to his time at Cayan, Mr. Menard has held multiple executive level financial positions for some of Boston's most prominent technology companies, where he served as Executive Vice President and Chief Financial Officer for both Bit9 and Brightcove. Mr. Menard also held multiple senior level administrative positions at Phase Forward, including Chief Financial Officer.

Mr. Menard also sits on the Board of Directors for Globoforce and is chairman of the company's Audit Committee. He is also a member of the Board of Overseers for Babson College and is a member of their Audit Committee. Recognized as one of Boston Business Journal's 40 Under 40 in 2009, he holds a BS degree in business administration from Babson College, as well as a MBA from Boston College.



CHRISTOPHER 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 markets transactions.

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 extensively in the M&A space, representing both public and private strategic buyers as well as financial buyers and sellers of privately held businesses. In the PE space, she also advises investors and funds in connection with portfolio investments, portfolio companies completing exit transactions and emerging companies seeking capital from investment funds and angel investors. Ms. O'Keefe received her law degree from American University, Washington College of Law.



Let's turn
blockchain ideas
into business
results

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CHUTZPAH IN THE CFO SUITE: BOLD DECISIONS, ACTIONS AND OUTCOMES

BOLD CALLS ARE A FUNDAMENTAL imperative for today's business leaders. Whether it's innovating the landscape, growing market share or reinventing competitive position, leaders are routinely faced with the need to make challenging decisions. Bold decisions, in which desired outcomes are expressed but by no means guaranteed, can include changes in market strategy, product direction, pricing models, talent management and/or expense allocation. Our luncheon keynote speakers will share their experience in taking the lead on bold actions and the impact on their companies.

➤ INTRODUCTION



PETER HIRST

Associate Dean, MIT Sloan Executive Education

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

Formerly the Chief Executive Officer of the commercialization, 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 England, and is a trustee and treasurer of the American Foundation of the University of St Andrews in Scotland. He is also 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.

Mr. Hirst 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.

In 2012, he 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.



DAVID FREAR

Senior Executive Vice President and Chief Financial Officer, SiriusXM

David Frear joined SiriusXM in June 2003 as the company's Executive Vice President and Chief Financial Officer where he is responsible for overseeing the finance, accounting, treasury, investor relations, IT, music royalties and satellite development operations. SiriusXM is the world's largest radio company measured by revenue, with more than \$5 billion in revenue, and serves more than 34 million subscribers in the U.S. and Canada.

Prior to joining SiriusXM, Mr. Frear was Executive Vice President and Chief Financial Officer, and a director of, SAVVIS Communications, a global managed network services provider with operations in 44 countries. He also served as Senior Vice President and Chief Financial Officer for Orion Network Systems. Joining Orion prior to the start of commercial operations, he assisted Orion in funding the construction of the Company's global satellite system and the launch of commercial services. He also played an important role in Orion's purchase by Loral Space and Communications. Mr. Frear also served as Chief Financial Officer for Millicom and held management positions at Bear, Stearns & Company, Credit Suisse, Transway International and Deloitte & Touche.

He received an MBA from the University of Michigan, Graduate School of Business Administration in Ann Arbor, Michigan.



GLENN SCHIFFMAN

Chief Financial Officer, IAC

Glenn H. Schiffman is Executive Vice President and Chief Financial Officer of IAC, and Chief Financial Officer 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 Raine Group, a merchant bank focused on advising and investing in the technology, media, and telecommunications industries. Other past leadership roles include Co-Head of Global Media at Lehman Brothers, Head of Investment Banking Asia-Pacific at Lehman Brothers, and subsequently Nomura, as well as Head of Investment Banking, Americas for Nomura following Nomura's acquisition of Lehman's Asia business.

Mr. Schiffman serves on the Board of Directors of ANGI HomeServices Inc. and Match Group. He is a member of the National Committee on United States-China Relations, and serves as a member of the Board of Visitors for the Duke University School of Medicine and the Board of Directors of GoNoodle. He is Founder and Chairman of the Valerie Fund Endowment and a member of the Valerie Fund's Board of Advisors. Mr. Schiffman has a degree in economics and history from Duke University. He was named Institutional Investor's CFO of the Year for the Midcap Internet Sector in 2018.



MICHAEL SHERIDAN

Chief Financial Officer, Docusign

As DocuSign's Chief Financial Officer, Michael Sheridan is responsible for overseeing the teams that drive global financial planning and analysis, revenue operations, accounting, procurement and investor relations.

Mr. Sheridan has more than 18 years of CFO experience in high-growth tech companies and a long track record of leading high-performance financial teams to success. Before joining DocuSign, Mr. Sheridan spent more than four years as CFO at FireEye. And prior to his role there, he held CFO roles at several technology companies—including Mimosa Systems, Facebook, IGN Entertainment and SonicWALL. Before SonicWALL, Mr. Sheridan worked as a financial executive at Genesys Telecommunications and NetApp.

Mr. Sheridan has a Bachelor of Science degree in Commerce from Santa Clara University.

➤ MODERATOR



KIMBERLY JOHNSON

Professional Products Editor, The Wall Street Journal

Kimberly S. Johnson is Professional Products Editor, a role that's central to The Wall Street Journal's efforts to provide business and financial professionals specialized content that helps them understand their industries, grow their businesses and advance their careers. She is responsible for a dozen professional verticals, leading a team of more than 60 journalists generating news, analysis and data for those products. The products under Ms. Johnson's watch include the suite of WSJ Pro Products launched in recent years, as well as *CFO Journal*, *CIO Journal*, *CMO Today*, *Risk & Compliance Journal*, *Logistics Report* and *The Frontiers* newsletter.

Prior to this position she was Editor of the *CFO Journal*, which focuses on coverage of corporate finance and issues that confront finance executives. Ms. Johnson has two decades of journalism experience, spanning print, online, broadcast, and radio. Prior to joining *The Wall Street Journal* in 2014, she spent five years covering financial activity in sub-Saharan Africa for various publications including the *Financial Times*, *Global Post*, and *The Africa Report* magazine. She previously wrote about the auto industry for *The Associated Press* in Detroit, where she covered the bankruptcy protection filings of General Motors and Chrysler. Before moving to Detroit, she was a business reporter at the *Denver Post*, where she covered retail, technology, telecommunications, and biotech. She also worked at the *New Haven Register*, *The Boston Globe* and CNN. Ms. Johnson holds a bachelor's degree in broadcast journalism and a master's degree in business and economics journalism from Boston University's College of Communication.

DIGITAL FINANCE, DIGITAL WORLD

FINANCE HAS LONG BEEN a technology leader, starting with software that was designed to automate a simple spreadsheet. However, finance continues to lead the way. Join our leadership panel as we explore the “tells” in the world of finance software, and what the digital future holds.



DOUG BAKER

Principal, KPMG

Doug Baker is a Principal in KPMG’s Management Consulting practice, with nearly 20 years of industry and consulting experience across finance and operations. He has delivered projects 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 an enterprise Hyperion EPM implementation at a drug diagnostic company, and affected major redesigns of the close process and accounting organization at both a global consumer products company and a \$10B insurance payor. Prior to joining KPMG, he worked for Ford Motor Company for nearly 10 years in a variety of management roles leading strategic projects that involved both finance and cross-functional operations teams. During his tenure he managed the Financial Planning & Analysis function for a \$5B product line, designed and implemented a global accounting and reporting solution, and led the design and reorganization of the global accounting function.



TIFFANY FREITAS

Chief Business Officer, PathAI

Tiffany Freitas is the Chief Business Officer at PathAI, a leading biotech company focused on applying machine learning to pathology for better diagnoses and personalized treatments. She manages PathAI’s business operations, focusing on driving ‘high-quality’ revenue growth, scaling the organization rapidly and effectively, and implementing strong finance and governance practices. Prior to joining PathAI, she was CFO at Vestmark, an enterprise SaaS business, and held leadership roles in finance, strategy and business development at The Walt Disney Company in California. Ms. Freitas developed her business foundation through investment banking and consulting at Citigroup and Bain & Company.

Recognized as one of *Boston Business Journal’s* CFO of the Year in 2017, she holds a BA in mathematics from Barnard College and an MBA from Harvard Business School.



ANITHA GOPALAN

Chief Financial Officer, Catalant Technologies

Anitha Gopalan is the Chief Financial Officer at Catalant Technologies, an on-demand business expertise and talent platform company. She is an accomplished and focused Senior Executive with more than 20 years of success across the SaaS, Technology, Financial Services, and Telecommunication industries. Ms. Gopalan’s broad areas of expertise include strategy, financial planning, analysis, operations, scaling, fund raising, accounting and investor relations. She has an accomplished track record of success in building strong teams, driving change, and scaling operations to deliver growth, manage risk, and drive mission-critical results. She has extensive experience in technology, media and tele-communications industries with entrepreneurial, high-growth pre-IPO and public companies.

Before joining Catalant, Ms. Gopalan was a Vice President of Finance at Rapid7, a Boston-based cyber security company, where she teamed up with other executives to deliver rapid growth from venture-backed start-up to a successful and oversubscribed IPO. Prior to Rapid7, she was in Silicon Valley where she held financial leadership roles at publicly-traded iPass, a cloud-based mobility management company. She spent nearly a decade in Ernst & Young with extensive experience in technology, media and telecommunications companies from private to multi-national public.



DR. MICHAEL SIEGEL

Principal Research Scientist, MIT Sloan

Dr. Michael Siegel is a Principal Research Scientist at the MIT Sloan School of Management, and is currently the Co-Director of the PROoductivity From Information Technology (PROFIT) Project. Dr. Siegel’s research interests include the integraton and use of information from multiple sources, and the use of modeling and data analytics to analyze complex systems.

His work has been published in areas including the use of information technology in financial risk management and global financial systems, cybersecurity, applications of computation social science to analyze state stability, digital business, financial account aggregation, healthcare information systems, heterogeneous database systems, managing data semantics, query optimization, intelligent database systems, and learning in database systems.

Dr. Siegel received his BS in engineering from Trinity College (1977), and MS in engineering from the Solar Energy Laboratory at the University of Wisconsin-Madison (1980), and an MA and PhD in computer science from Boston University (1989).



ASH NOAH

Vice President, CGMA External Relations

Ash Noah is Vice President CGMA External Relations at the Association of International Certified Professional Accountants. He focuses on introducing, promoting and widening awareness of the Chartered Global Management Accountant® (CGMA) designation among organizations worldwide.

He works 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 the International Unit of the global transport and logistics provider, TNT Express, and has led finance teams in 45 countries through significant transformation. While at TNT, Mr. Noah worked with CIMA to help build Business Partnering competencies in the finance function. He has been closely involved in mergers and acquisitions in Brazil, Chile, India and Spain.

He has also led a number of business turnarounds in the Middle East, Africa, Australia, Northern Europe and Asia. He is a licensed US CPA CGMA and a Fellow of the Chartered Institute of Management Accountants. He is currently based in Durham, North Carolina.



RECON- STRUCTING THE WORKFORCE FOR GROWTH

THE WORKFORCE CONTINUES to evolve as bold changes are made to both the physical location (shared space, satellite offices, relocation into cities away from suburbs) and the responsibilities of individual contributors (flatter organizations, mixing of generations, shorter tenures). This panel of experts will explore the push-and-pull of where and how leading organizations collaborate effectively.



KEVIN DURKIN

Chief Financial Officer, Threat Stack

As the Chief Financial Officer at Threat Stack, 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 Threat Stack, Mr. Durkin was the Chief Financial Officer of DataGravity and Chief Financial Officer of Azuki Systems (acquired by Ericsson). 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 workplace best practices, organizational enhancement, workforce training, performance measurement and compliance. She believes that a strong HR strategy improves a business’s productivity, quality and employee retention. Ms. Gillespie’s commitment to service mirrors the culture and commitment that HR Knowledge strives to provide to her clients.

Prior to HR Knowledge, Ms. Gillespie was most recently an independent HR Consultant. In this role, she was a trusted human resources advisor to small- and mid-sized organizations providing guidance, direction and advice about the application or interpretation of human resources and labor policies, as well as practices and procedures in a variety of areas related to human resource management.

Ms. Gillespie is a certified human resource professional. She graduated summa cum laude from Northeastern University with a BS in business management and a concentration in leadership. She is a member of the Society for Human Resource Management (SHRM) and New England Human Resources Association (NEHRA).



DR. SHAN NAIR

President, Nucleus

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 US 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, FaceTime and Sonus Networks.

Dr. Nair took over in August 2018 as President of Nucleus, the leading provider of international expansion services (IES) for small to medium sized companies with operations in multiple countries. Nucleus is unique in that it provides true one stop, multidisciplinary, multi-country shopping for companies seeking international expansion or with international operations.

In addition to the above, Dr. Nair has Angel Invested in a variety of technology companies and PE funds in US and he also runs a UK property portfolio. He has a doctorate in nuclear physics from the University of Oxford. He has received multiple recognitions for his contribution to business in the US, UK and India.



AMIT SINGHI

Chief Operating and Financial Officer, Piston Group

Amit Singhi is the Chief Operating & Financial Officer of the Piston Group, with responsibility for operating and financial matters at all of the Piston Group’s four companies. He most recently was the Chief Financial Officer at FLIR Systems, leading all Finance and I.T. functions from 2015 to 2017. FLIR Systems is a \$4.5 Billion mid-cap technology public company, that designs, develops, manufactures, markets, and distributes sensor systems that enhance perception and awareness.

Prior to joining FLIR, Mr. Singhi was an employee of Ford Motor Company from 1994 to 2015. During his tenure at Ford, he held financial management positions in a wide range of operating areas, including new product development, engineering, purchasing, supply chain, manufacturing, marketing, sales & service, and corporate staffs. He was the Chief Financial Officer of Ford South America, based in Sao Paulo, Brazil, from 2012 to 2015.

Prior to Ford, he was an engineer at General Motors R&D Center from 1989 to 1994, where he held several engineering & operational roles involved with development of advanced navigation systems, product planning, and manufacturing consulting.

Mr. Singhi holds an MBA in Finance and Corporate Strategy, an MS in Electrical Engineering Systems from the University of Michigan, Ann Arbor, and a Bachelors of Technology in Electrical Engineering from the Indian Institute of Technology, Bombay.



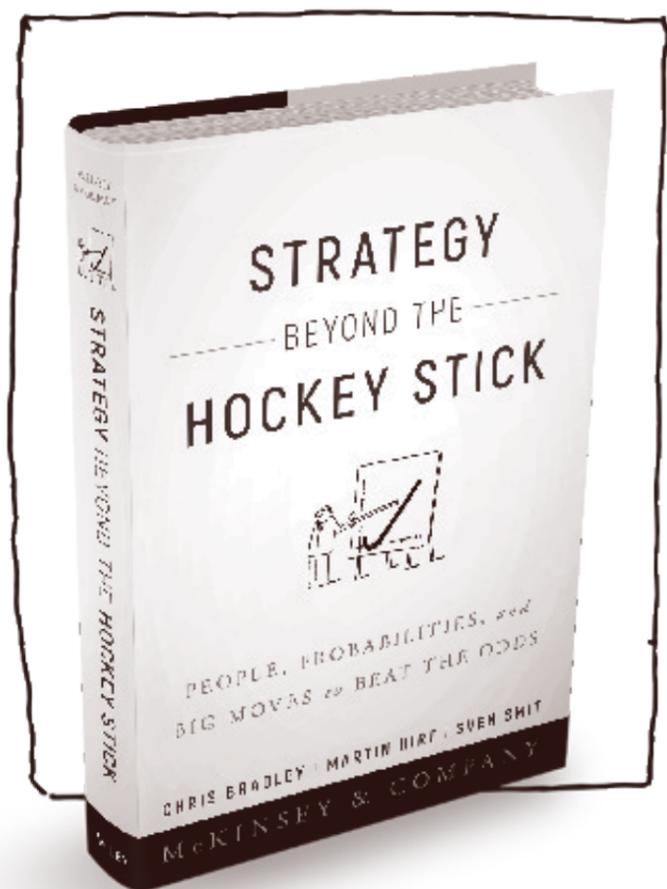
NANCY PERSSON

Executive Coach, Leadership Development Consultant, and Principal, Leadership Growth Solutions

Nancy Persson is an Executive Coach, Leadership Development Consultant, and Principal of Leadership Growth Solutions, a management consultancy providing executive coaching, leadership development and strategic team solutions across various business sectors and not-for-profit organizations. She brings significant experience in developing and driving talent strategies in a variety of business environments, including multi-channel operations, global businesses, and small entrepreneurial ones. Her 30+ years of business experience, and her 10+ years as an executive coach have forged a talented leader known for work ethic, versatility, passion, and compassion.

Ms. Persson’s career before founding Leadership Growth Solutions includes senior leadership positions in financial services, retail, and e-commerce businesses, as well as line leadership experience. She learned early on to speak the language of the business and is recognized for practical bottom-line solutions that work. She is an expert facilitator, communicator, executive coach and development consultant, widely recognized for her authenticity, energy, and creativity. A committed life-long learner, she has earned a first-degree Black Belt in Tae Kwan Do, and has more recently added kickboxing and beekeeping as hobbies. Ms. Persson lives in South Easton, MA and is passionate about her family, her work, downhill skiing, and gardening.

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JULIA ABRAMOVICH MBA '02

Vice President of Sales, IBM

Julia Abramovich is a Vice President of Sales for IBM's Cloud Software Business for Retail, Consumer Products, and Travel clients. Ms. Abramovich brings over twenty years of work experience in sales, strategy consulting, marketing, and business development. She also serves as Greater Boston Senior Location Executive for IBM 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 20,000-person GBS consulting organization, where she started her tenure with IBM in 2002. As a strategy consultant, she focused 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 global engineering consulting firm, where she analyzed industry compensation trends, developed performance management systems, 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 Economics and Philosophy. In 2002, She earned an MBA from MIT Sloan where she was awarded a Merit Fellowship for her contributions to the Sloan community. She is also involved with several local non-profit organizations, including the United Way, and serves as a board member for Associated Industries of Massachusetts (AIM).



DAVID GARRITY

Co-Founder and Partner, BTblock and Independent Director

With over 25 years experience in the financial services industry, David Garrity has served as chief financial officer and board director for both public and private companies, and has extensive experience in operations, advisory and research disciplines. Mr. Garrity served as a Chief Financial Officer and Board Director at Interclick, Inc., a behavioral targeting internet advertising network acquired by Yahoo for \$270mm. At Aspen Group, he served as Chief Financial Officer and was integral in taking Aspen public, raising growth capital and developing relationships with investors, regulators and institutional clients. Mr. Garrity appears regularly on CNBC, BNN, Bloomberg, The Financial Times, Asia Times, Yahoo Finance and other media outlets.

He currently serves as Independent Director for BTCS, Inc., a public company focused on blockchain technology development and application, and digital asset management. He is also Co-founder and Partner at BTblock, a blockchain consultancy firm specializing in providing consulting services and workshops for organizations interested in exploring blockchain solutions to help them improve performance across all levels of the value chain.



NAEEM ISHAQ

Chief Financial Officer, Treasurer & Executive Vice President, Risk, Circle

Naeem Ishaq joined Circle from Boxed, the New York based e-commerce platform company where he was Chief Financial Officer, and held responsibility for leading several divisions of the company. Prior to Boxed, he was the Head of Finance, Strategy & Risk for Square, a fintech company noteworthy for their exceptional finance and risk management execution. Previously, he served as Senior Director of finance & strategy at Salesforce.com, where he led the company's long range planning, supported all M&A activity, and led Finance & Strategy activities for Salesforce.com's acquired standalone businesses.



STEVEN PIPP

Research Manager, Silicon Valley Bank

Steven Pipp is a Research Manager based in San Francisco, CA, responsible for leading capital markets research and data-driven analysis on the venture economies 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 nontraditional venture investors.

Prior to his research role, Mr. Pipp spent two years managing advisory and valuation engagements for venture-backed technology companies as part of SVB Analytics. Before joining SVB, he worked in Minneapolis, MN, as a consultant and entrepreneur developing business strategies and evaluating the economic potential for technologies at the intersection between agriculture and energy.

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



SILVIO MICALI

Professor, MIT Computer Science and Artificial Intelligence Laboratory (CSAIL)

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 pseudorandom generation and cryptography, interactive and computationally sound proofs, zero knowledge, secure protocols, and mechanism design.

Mr. Micali is the recipient of the Goedel prize (in theoretical computer science) and the RSA prize (in cryptography), and is a member of the National Academy of Sciences, the National Academy of Engineering, and the American Academy of Arts and Sciences.



BOLD THAT TEAM: BEYOND HR

BUILDING THE RIGHT TEAM includes deliberate consideration of strategic planning, effective operations and use of capital of an organization. This panel will explore the CFO's role vis-à-vis the make-up of the leadership team. How does a CFO evaluate a new Sales or R&D lead? What if it's time for a new CFO—either self-decided or in response to external pressure?



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 at public and private companies, high growth start-ups, 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. He holds a BA from Wake Forest University and an MBA from Northeastern University.



CRAIG DRISCOLL

Partner, Highland Capital Partners

Over the past 11 years at Highland Capital Partners, Craig Driscoll has led all talent and recruiting activity for the firm. He advises Highland's portfolio companies on executive recruiting issues. 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. Driscoll has leveraged his broad networks and team building acumen to pursue investments in several areas including the Future of Work. He is on the board of Remote Year and Trilogy Education Services, and actively involved with Catalant, INXPO, and SessionM. He was previously active with the boards of Bullhorn (acquired by Vista Equity) and Quattro (acquired by Apple).

Mr. Driscoll joined Highland from Korn/Ferry International where he was an executive recruiter in Korn/Ferry's Boston office focusing on venture-backed technology companies. He completed C-level, Board of Director and senior executive placements at several industry leading companies.

Previously, he was Vice President, Business Development at JacobsRimell, a London-based software startup and Fidelity Ventures' portfolio company. He was an Associate at Fidelity Ventures where he focused on investments in the communication infrastructure sector. He also worked as a research analyst at the Yankee Group.

Mr. Driscoll holds a BE, mechanical engineering from Vanderbilt University.



NICOLE HEIFNER

Chief Financial Officer, Accent Therapeutics

Nicole Heifner joined Accent Therapeutics in September 2017 and serves as Chief Financial Officer. Prior to joining Accent, she drove two successful initial public offerings in biotechnology—first as the Senior Director of Finance at Epizyme, 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 financial roles for Kraft Foods Group, Inc. of Northfield, Illinois from 1995 through 2015, most recently as Senior Vice President, Finance of U.S. Business Units, U.S. Sales, Integrated Supply Chain, RDQ and Marketing Services. He held the positions of Senior Vice President of Finance from 2012 to 2015 and Vice President of Finance from 2010 to 2012.



DAN DENISCO

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 senior-level accounting and finance professionals on a project and interim basis.

Since joining RHI in 1985 as a recruiting manager, Mr. DeNisco has held several highly visible positions within the company including Area Manager for Upstate New York and Southeastern Canada, Regional Manager for the Mid-Atlantic and Senior Regional Manager for the Carolinas, Georgia and Florida.

In 1975, Mr. DeNisco began his career in Buffalo, N.Y. at J.D. Elliott & Co. CPAs. During his ten years with the large CPA firm, he worked as a Staff Accountant, Senior Accountant, Manager and became a Partner and Shareholder.

Mr. DeNisco has a B.S. degree in Accounting from SUNY at Buffalo and is an inactive licensed CPA in New York State.



THE BUSINESS OF CANNABIS



MARK CASTANEDA

Chief Financial Officer, Tilray

In his capacity as Chief Financial Officer at Tilray, Mark Castaneda is responsible for stewarding Tilray's finances as the company pursues an aggressive global growth strategy to scale distribution of its high-quality cannabis products in Canada and internationally. He has served as Chief Financial Officer, Secretary and Treasurer since March 2018. Mr. Castaneda previously served as the Chief Financial Officer and Assistant Treasurer of Primo Water Corporation, a publicly traded water marketing and distribution company, from March 2008 to January 2018. From October 2007 to March 2008, Mr. Castaneda served as the Chief Financial Officer for Tecta America, Inc., a private national roofing contractor, and from October 2004 to August 2006, he served as Chief Financial Officer for Pike Electric Corporation, a publicly traded energy solutions provider, where he helped lead its initial public offering in July 2005.

Mr. Castaneda 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 2004. Mr. Castaneda helped lead Blue Rhino's initial public offering in May 1998. 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 Ranir Global Holdings, LLC since August 2016. Mr. Castaneda holds a BS in Accountancy and a Masters, Taxation from DePaul University.

MARIJUANA HAS COME A LONG WAY. From Reefer Madness to GMP-certified medical marijuana, today the business of cannabis offers a bold new promise. This fireside chat will dig into the weeds of cannabis science and technology, as well as the policy changes and resulting strategic opportunities of this new market.



TIM SAUNDERS

Executive Vice President and Chief Financial Officer, Canopy Growth Corporation

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 production capacity, brand strength and global business footprint. In addition, he facilitated the July 2016 up-listing of the company's shares to the Toronto Stock Exchange—making Canopy the first cannabis company to be listed on a major global stock exchange and later the first to be on the S&P TSX Index. His leadership was instrumental to listing the company's shares on the New York Stock Exchange (NYSE) in May 2018. Prior to joining Canopy, Mr. Saunders held executive finance positions at Mitel, Zarlink Semiconductor, Vodafone (UK/Czech Republic), Oskar Mobil (Czech Republic) and Plasco Energy Group.

Mr. Saunders earned his CPA with PricewaterhouseCoopers and is a proud graduate of Bishop's University (Quebec) where he obtained his BBA. Mr. Saunders also earned an executive certificate from the Ivey School of Business at the University of Western Ontario.



SCOTT STERN

Professor of Management, MIT Sloan

Scott Stern is a Professor of Management at the MIT Sloan School of Management. Professor Stern explores how innovation and entrepreneurship differ from more traditional economic activities, and the consequences of these differences for strategy and policy. His research in the economics of innovation and entrepreneurship focuses on entrepreneurial strategy, innovation-driven entrepreneurial ecosystems, and innovation policy and management. Recent studies include the impact of clusters on entrepreneurship, the role of institutions in shaping the accumulation of scientific and technical knowledge, and the drivers and consequences of entrepreneurial strategy.

Professor Stern has worked widely with practitioners in bridging the gap between academic research and the practice of innovation and entrepreneurship. This includes advising start-ups and other growth firms in the area of entrepreneurial strategy, as well as working with governments and other stakeholders on policy issues related to competitiveness and regional performance. Additionally, Professor Stern co-founded the MIT Regional Entrepreneurship Acceleration Program, advised the development of the Social Progress Index, and served as the lead MIT investigator on the US Cluster Mapping Project.

Professor Stern started his career at MIT, where he taught from 1995 to 2001. Before returning to MIT in 2009, he held positions as a Professor at the Kellogg School of Management and as a Non-Resident Senior Fellow at the Brookings Institution. Stern is the director and cofounder of the Innovation Policy Working Group at the National Bureau of Economic Research. In 2005, he was awarded the Kauffman Prize Medal for Distinguished Research in Entrepreneurship. He holds a BA in economics from New York University and a PhD in economics from Stanford University.





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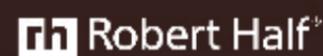
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