MIT SLOAN
CFO SUMMIT

THE 21ST ANNUAL
MIT SLOAN CFO SUMMIT

DELIVERING RESULTS

2023

DEAR FRIENDS,

Welcome to the 21st annual MIT Sloan CFO Summit.

It's been an eventful year since our last conference. Higher interest rates and an evolving economy, not to mention most of us hadn't heard of generative AI a year ago. From 2023's start as a "year of efficiencies" to a year ending with green shoots, healthy IPOs, growing optimism, and a stronger-than-expected business environment, today's CFOs certainly live in interesting times.

This year's theme, "**DELIVERING RESULTS**," acknowledges your commitment to success and the reality of managing through an always-changing landscape.

As such, we are grateful to each of you here today. Whether on site for the first time or returning as a many-times attendee, participating as a member of the audience or as a speaker, we thank you for your presence. We are immensely proud of having more than two decades of achievement identifying the topics of interest, along with the speakers who can share their insights, and therefore attracting this best-in-class audience.

We are delighted to open the conference with **INNOVATION: DISTRIBUTING RESULTS** with Simon Johnson, PhD '89, Ronald A. Kurtz Professor of Entrepreneurship, MIT Sloan. Professor Johnson's appearance at our conference is years in the making, and we are excited to host him this year upon the launch of his latest book *Power and Progress: Our Thousand-Year Struggle Over Technology & Prosperity*. Enjoy your copy of the book!

We also look forward to his **FIRESIDE CHAT** with Joseph Wolk, Executive Vice President & Chief Financial Officer, Johnson & Johnson, a leader in healthcare innovation.

Our morning keynote, Michael Bungay Stanier, will share insights from his latest best-seller, ***HOW TO WORK WITH ALMOST ANYONE***. Happiness and success depend on good relationships, and Michael will share his insights into active relationship management—whether it's a good one that goes off the rails or one that was bad from the start.

Our keynote panel, **LEADERSHIP LESSONS**, includes CFOs from Delta Air Lines, GE and Honeywell led in conversation by Nina Trentmann of *Bloomberg News*. This preeminent group will provide their insights into setting goals, establishing processes and delivering results.

Our breakout panels today are organized along two tracks. The first track offers perspectives on **LEVERAGING RESULTS**—how CFOs lead new developments including everything from new technologies to new business frameworks; manage M&A including transactions and business cycles; and balance risks, rewards and results. The second track offers perspectives on **DELIVERING CAPABILITIES**—how CFOs manage the basics such as cash optimization and funding strategies; incorporate customer interactions into strategic planning, financial decision-making and resource allocation; and the ways CFOs can best recruit and retain talent in the finance function.

We traditionally end the formal portion of our conference with a look at an innovative industry leader. This year, in our closing fireside chat, we are honored to host moderator Jonathan Fleming, Senior Lecturer, Trust Center for MIT

Entrepreneurship in conversation with David Denton, Chief Financial Officer & Executive Vice President, Pfizer, one of the world's premier biopharmaceutical companies.

After this discussion, please join us as we close out the conference with our **NETWORKING RECEPTION**—a chance to say hello to new names and old friends over heavy appetizers and light dessert.

This event would not be possible without our volunteer team. Planning this conference is practically a year-round effort, and I would like to acknowledge the team's efforts by listing these individuals to the right. As you enjoy today's premier CFO Summit, please say thank-you to these volunteers.

We are also honored to be supported by a wonderful group of sponsors. The reputation and value of the CFO Summit attracts many outstanding organizations. This enables us to partner with thought leaders in their respective industries. Of special note is our knowledge partner, McKinsey & Company. We also thank our gold level sponsors KPMG, UBS and WilmerHale, our silver level sponsors Lockton, Robert Half/Protiviti and Vendr, and our networking sponsor Oracle NetSuite. Their support and intellectual contributions enable us to bring you this annual event, which has been recognized as the most influential conference of its kind.

An exciting and educational day is ahead. Absorb knowledge, expand your network, and once again, thank you for being an integral part of this extraordinary event!

Jeremy Seidman **MBA '03**

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Managing Director & Chief Financial Officer BDCs, Oak Hill Advisors, L.P.

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Chief Financial Officer, Trexon

7:30AM - 8:15AM
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 CFO SUMMIT — GRAND BALLROOM

Innovation: Distributing Results

SIMON JOHNSON PhD '89
Ronald A Kurtz Professor of Entrepreneurship, MIT Sloan

9:00 AM - 9:30 AM
MORNING FIRESIDE CHAT — GRAND BALLROOM

Fireside Chat with Joseph Wolk of Johnson & Johnson

SIMON JOHNSON PhD '89
Ronald A Kurtz Professor of Entrepreneurship, MIT Sloan

JOSEPH WOLK
Executive Vice President & Chief Financial Officer, Johnson & Johnson

9:30 AM - 10:00 AM
MORNING KEYNOTE — GRAND BALLROOM

How to Work with Almost Anyone

MICHAEL BUNGAY STANIER
Author, *The Coaching Habit* and *How to Work with Almost Anyone*

10:00 AM - 10:30 AM
GRAND BALLROOM FOYER

Morning Coffee Break

10:30 AM - 11:30 AM
TRACK 1: LEVERAGING RESULTS — GRAND BALLROOM

Driving Innovation

KSENIA KALADIOUK MCP '14
Partner, McKinsey & Company

DENNIS FEHR
Global Chief Financial Officer, 6K Energy

MONALISA SHROFF
Chief Financial Officer, Freight Farms

MATT SKARUPPA
Chief Financial Officer, Duolingo

SALONI VARMA
Chief Financial Officer, Thorne HealthTech

TRACK 2: DELIVERING CAPABILITIES — SALONS FGH

Cash is Still King

JEFF DYKSTRA
Principal, KPMG US

CHRIS CAPRIO
Chief Financial Officer, Focus Technology

KELLY MACDONALD
Chief Financial Officer, Dynavax

DUSTIN PEDERSON
Chief Financial Officer, Locus Robotics

JASON QUINN
Chief Financial Officer & Chief Operating Officer, Vendr

11:30 AM - 12:15 PM
GRAND BALLROOM FOYER

Luncheon Buffet

12:15 PM - 1:15 PM
LUNCHEON KEYNOTE PANEL — GRAND BALLROOM

Leadership Lessons

NINA TRENTMANN
Corporate Finance Team Leader, *Bloomberg News*

CAROLINA DYBECK HAPPE
Senior Vice President & former Chief Financial Officer, GE

DAN JANKI
Chief Financial Officer, Delta

GREG LEWIS
Senior Vice President & Chief Financial Officer, Honeywell

MODERATOR

SOCIAL

#MITCFO

1:30 PM - 2:30 PM
TRACK 1: LEVERAGING RESULTS — GRAND BALLROOM

Successful M&A: Managing Transactions and Market Cycles

LIZ WOL
Partner, McKinsey & Company

ANDREW BONNES
Partner, WilmerHale

PAUL MOZAK
Executive Vice President & Chief Financial Officer, Blue Cross Blue Shield of Michigan

JOSIAS PONTES
Former Chief Financial Officer, Sigilon Therapeutics

ALEX TRIPLETT
Chief Financial Officer & Chief Operating Officer, Appfire

TRACK 2: DELIVERING CAPABILITIES — SALONS FGH

The Customer-Centric CFO

SINCLAIR RIDLEY-THOMAS
Managing Director, UBS Financial Services Inc

CHANTELLE BREITHAUPT
Chief Financial Officer, Aspen Technology

NATHAN GOODEN
Chief Financial Officer, SquareSpace

TIMOTHY MAMMEN
Chief Financial Officer and Senior Vice President, IPG Photonics Corporation

CHRIS SANDS
Chief Financial Officer, IntelyCare

2:30 PM - 3:30 PM
TRACK 1: LEVERAGING RESULTS — GRAND BALLROOM

Balancing Risks, Rewards and Results

JOHN CARRIER SCD '95
Senior Lecturer, System Dynamics Group, MIT Sloan

PETER BANAT
Chief Financial Officer, Bay State Milling

DANIEL BERGER
Senior Vice President, Head of Tax Insurance, Lockton

DAVID CHAVEZ
Senior Vice President & Chief Financial Officer, Shared Services, CVS Health

SARAH ROMANO
Chief Financial Officer, First Wave BioPharma, Inc.

TRACK 2: DELIVERING CAPABILITIES — SALONS FGH

Talent in the Finance Function

ANKUR AGRAWAL
Partner, McKinsey & Company

KATE BUEKER MBA '98
Chief Financial Officer, HubSpot

KIM DODGE
Former Chief Financial Officer, Ibex Medical Analytics

RAVI RAGNAUTH
Partner, Chief Financial Officer, Berkshire Residential Investments

ANDREA SPINELLI
Managing Director, Protiviti

3:30 PM - 4:00 PM
GRAND BALLROOM FOYER

Coffee Break

4:00 PM - 4:30 PM
AFTERNOON FIRESIDE CHAT — GRAND BALLROOM

The Diversified CFO: From CVS to Lowe's to Pfizer

JONATHAN FLEMING
Senior Lecturer, Trust Center for MIT Entrepreneurship

DAVID DENTON
Chief Financial Officer & Executive Vice President, Pfizer Inc.

4:30 PM - 6:15 PM
GRAND BALLROOM FOYER

Networking Reception

Join Oracle NetSuite at our golf themed cocktail reception! There will be a golf simulator to help you improve your swing, as well as featured items from some of NetSuite's top customers in the game.

THE 21ST ANNUAL MIT SLOAN CFO SUMMIT

AGENDA

WELCOME

OPENING REMARKS

THE 21ST ANNUAL
MIT SLOAN CFO SUMMIT

8:15 AM - 8:30 AM
GRAND BALLROOM

Jeremy Seidman MBA ’03

Chair, MIT Sloan CFO Summit

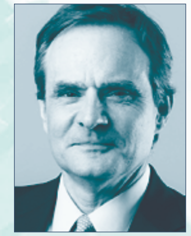
Jeremy Seidman is a Managing Director at UBS Financial Services, and joined UBS in 2015 after 10 years at Credit Suisse Private Bank, where he also served on Credit Suisse’s Advisory Council, a 14-person leadership team in the Private Bank.

He 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, he 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*. Jeremy has served on the advisory board for WGBH, and currently serves on the advisory boards for Coaching-4Change and MIT Sloan. Jeremy, his wife, son, and daughter live in Wellesley, MA and enjoy spending the summers in Narragansett, RI.

8:30AM - 9:00 AM
GRAND BALLROOM

INNOVATION: DISTRIBUTING RESULTS

The path of technology is a double-edged sword—making our corporate roles easier and more seamless, but also undermining jobs through excessive automation, massive data collection, and intrusive surveillance. It doesn't have to be this way, and the CFOs here have the power to balance this at their companies. Professor Simon Johnson delves into more detail during his keynote, and provides the vision needed to redirect innovation so it benefits the most employees.



MIT MANAGEMENT SLOAN SCHOOL

Simon Johnson PhD '89

Ronald A Kurtz Professor of Entrepreneurship, MIT Sloan

Simon Johnson is the Ronald A. Kurtz (1954) Professor of Entrepreneurship at the MIT Sloan School of Management, where he is head of the Global Economics and Management Group. In 2007-08, he was the chief economist at the International Monetary Fund (IMF), and he currently co-chairs the CFA Institute Systematic Risk Council. In February 2021, Professor Johnson joined the board of Fannie Mae.

Professor Johnson's most recent book, *Power and Progress: Our 1000-Year Struggle Over Technology & Prosperity*, explores the history and economics of major technological transformations up to and including the latest developments in Artificial Intelligence. His 2009 book *13 Bankers: the Wall Street Takeover and the Next Financial Meltdown* was an immediate bestseller and has become one of the most highly regarded books on the financial crisis. Professor Johnson holds a BA in economics and politics from University of Oxford, an MA in economics from the University of Manchester, and a PhD in economics from MIT.

9:00 AM - 9:30 AM
GRAND BALLROOM

Fireside Chat with Joseph Wolk of Johnson & Johnson

In this fireside chat, we look forward to sitting down with Joseph Wolk, Executive Vice President and Chief Financial Officer, of Johnson & Johnson and Simon Johnson from MIT Sloan.

MIT MANAGEMENT SLOAN SCHOOL

Simon Johnson PhD '89
Ronald A Kurtz Professor of Entrepreneurship, MIT Sloan

MORNING FIRESIDE CHAT

Johnson&Johnson

Joseph Wolk

Executive Vice President & Chief Financial Officer, Johnson & Johnson

Joseph J. Wolk (Joe) is the Executive Vice President and Chief Financial Officer for Johnson & Johnson where he leads the company's Finance and Global Services organizations and serves on the Company's Executive Committee.

Joe plays a strategic role in the overall management of the organization and leads the development and execution of the Company's long-term financial strategy. Additionally, as the financial steward of Johnson & Johnson, Joe's scope of responsibilities includes driving competitive and profitable growth, generating sustainable cash flow, allocating capital to maximize value creation and managing risk across the entire enterprise.

Prior to assuming his role as CFO in 2018, Joe was the Vice President of Investor Relations for Johnson & Johnson. In his 25-year tenure at the Company, Joe has held a variety of senior leadership roles in several sectors and functions. He served as Vice President of Finance for the Innovative Medicine Group, Vice President of Finance for the MedTech Global Supply Chain and Chief Financial Officer of the North America Innovative Medicine Group.

Joe holds a Bachelor of Science degree in Finance from St. Joseph's University and earned his Juris Doctor degree from Temple University School of Law. He is also a Certified Public Accountant (CPA).

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Perspectives on corporate finance and strategy

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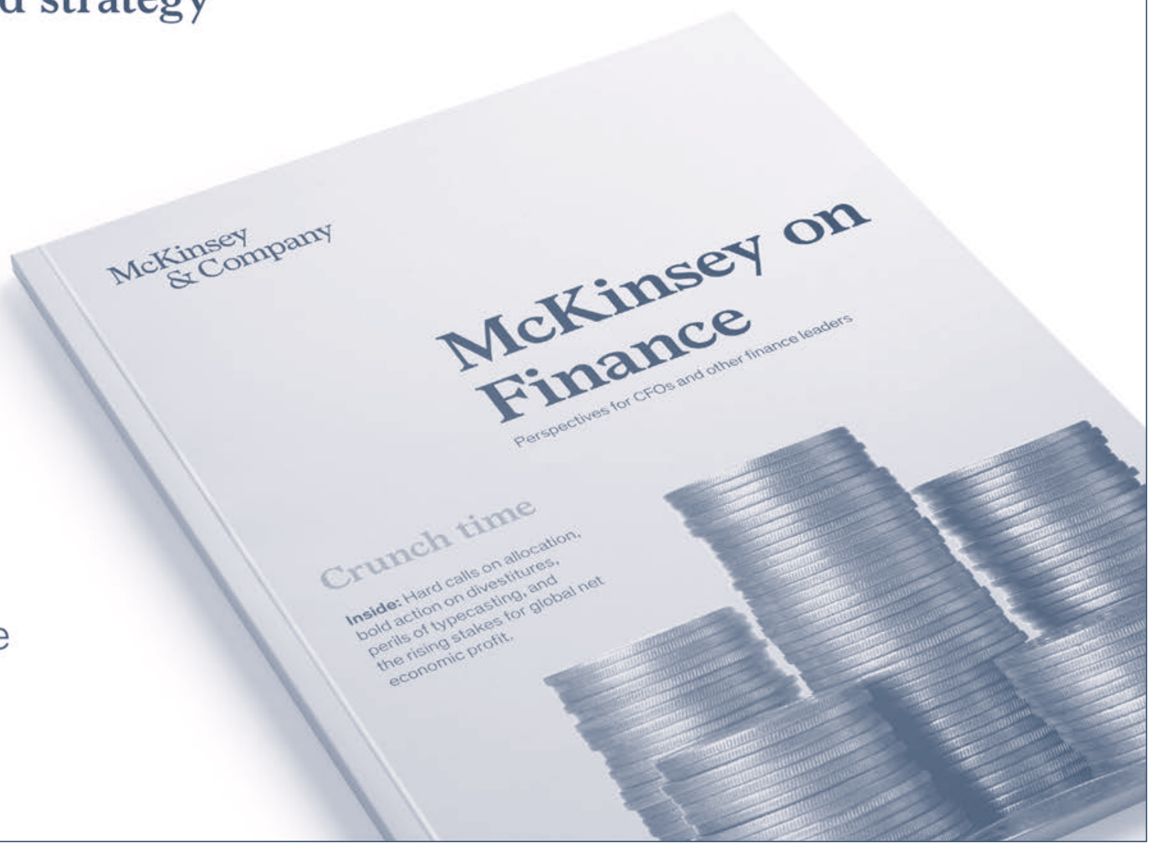

McKinsey Strategy & Corporate Finance

@McKonFinance

MORNING KEYNOTE

9:30 AM - 10:00 AM
GRAND BALLROOM

HOW TO WORK WITH ALMOST ANYONE

Every working relationship can be better. The people you manage. The way collaboration happens with colleagues and peers. How you connect with important prospects and key clients. We say “Hi,” exchange pleasantries… and hope for the best. The truth is it doesn’t have to be this way. Michael Bungay Stanier shares a tested process that sets up working relationships for the best possible success.

Michael Bungay Stanier

Author of best-selling books, *The Coaching Habit* and *How to Work with Almost Anyone*

Michael Bungay Stanier is at the forefront of shaping how organizations see coaching as an essential leadership competency. His book *The Coaching Habit* is the best-selling coaching book of this century, with over a million copies sold. In 2019, he was named the #1 thought leader in coaching, and he has spoken on coaching from Brené Brown’s podcast to the TEDx stage.

Michael also founded Box of Crayons, a learning and development company that helps organizations transform from advice-driven to curiosity-led. He currently leads MBS.Works, a place where people find the clarity, confidence and community to be a force for change.

Driving Innovation

10:30 AM - 11:30 AM
GRAND BALLROOM

Innovation is everywhere—from new technologies (hello ChatGPT) to new business frameworks (welcome ESG)—and CFOs are often at the forefront of deciding the trajectory of those technologies. In this session we'll learn how the CFO contributes to driving innovation, including when to be a first mover and when it may make sense to be a fast follower.

McKinsey&Company

Ksenia Kaladiouk MCP '14

Partner, McKinsey & Company

Ksenia Kaladiouk is a Partner in McKinsey & Company's Boston Office who serves as a leader in the Electric Power & Natural Gas and Strategy & Corporate Finance practices. Her work spans corporate and business strategy, investor relations, valuation, strategic financial planning, as well as M&A in the context of the energy transition. She works across the energy value chain with utilities, renewables developers, energy technology players, IPPs and infrastructure investment firms. She is the author of several external publications on the future of the power sector and grid evolution.

Prior to McKinsey, Ksenia was a Research Associate at MIT's Lab for Regional Innovation and Spatial Analysis, a Harvard Kennedy School Rappaport Fellow with the City of Boston and a Product Manager at the Corporate Executive Board (now Gartner).

Ksenia holds a Master of City Planning (MCP) from MIT in Cambridge, MA and a BA magna cum laude from the Cornell University.

6K

Dennis Fehr

Global Chief Financial Officer, 6K Energy

Dennis Fehr is Global Chief Financial Officer and strategic business partner at 6K, who works across the organization to optimize growth and enhance profitability. He is a go-to executive tapped to steer companies through exponential growth, turn around underperforming businesses, and institute discipline and analytical rigor. He operates with broad industry exposure; background ranging from startups to high growth and maturity; and expertise in Financial Planning & Analysis, Accounting, Tax, Treasury, Investor Relations, IT/ERP implementations, M&A, and Procurement.

As Chief Financial Officer of Fluence Energy, he guided a company that expanded revenue from $30 million in FY18 to a projected $1.1 billion in FY22 and built international presence to 10 regional entities across the globe. He built a finance function for the newly formed joint venture and raised $1 billion through an oversubscribed IPO priced above the range.

Previously, Dennis advanced through numerous finance roles at Siemens with assignments in Germany, Indonesia, Mexico, and China. As Vice President, Finance, he turned around an unprofitable, €350 million engineering, procurement, and construction (EPC) operation, rationalizing geographic and vertical market focus, downsizing footprint and workforce, and strengthening risk management associated with the contracting process. He also led ERP implementations, completing on time and on budget.

Dennis holds a BA in Business Administration from Cooperative State University in Villingen-Schwenningen, Germany. He currently serves as Chairman of the Board of the German International School Washington.

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Monalisa Shroff

Chief Financial Officer, Freight Farms

Monalisa Shroff is a leading force in the AgTech world. Formerly the Chief Financial Officer for Lettuce Grow, she was appointed the Chief Financial Officer of Freight Farms in 2021. Monalisa is a finance & operations professional with over 15 years' experience in finance and operations with strong focus in strategic and financial planning and analysis, forecasting and budgeting, business analytics and operations management.

Matt Skaruppa

Chief Financial Officer, Duolingo

Matthew Skaruppa has served as Chief Financial Officer for Duolingo since February 2020. He came to help the company prepare for IPO, and the company went public in July 2021. He joined with more than 15 years of finance and operations experience and prior to Duolingo was most recently a Vice President at Goldman Sachs from January 2016 to February 2020 where he focused on partnering and helping with growing technology companies. Before that, Matthew spent five years as Principal at KKR Capstone, where he partnered with CEOs, CFOs, and management teams on key value creation initiatives to drive growth and operating improvements. He also worked as a consultant at Bain & Company from 2004 to 2008 where he helped healthcare and real estate businesses with strategy and private equity firms on due diligence. He sits on the board of Lovevery, a company that helps parents develop their children through innovative and science-backed play kits. He holds a B.S. in Chemical Engineering from Northwestern University and an M.B.A. from the Stanford Graduate School of Business.

Saloni Varma

Chief Financial Officer, Thorne HealthTech

As CFO of Thorne HealthTech, Saloni Varma leads all aspects of the company's Accounting and Finance functions including budgeting planning and analysis, accounting, SEC reporting, tax, treasury, and investor relations. She brings more than 20 years of experience across a range of consumer goods companies, most recently as CFO of MotifFoodWorks. Prior to that she was CFO of ByHeart and has held various leadership roles at purpose-driven companies such as Unilever and Chobani. Saloni has worked in investment banking in New York and Tokyo at UBS and began her career in accounting at KPMG. She has a Master of Commerce, Accounting from the University of Mumbai, and a Master's in Finance and Entrepreneurial Management from The Wharton School. She is also the Co-Treasurer for Common Denominator, a non-profit providing free one-on-one tutoring to children in New York City. Saloni served as the Chair of the Audit Committee on the Thorne HealthTech Board of Directors from September 2021-March 2023, and still serves as a member of the board of directors. She currently lives in New York City with her two amazing kids.

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Cash is Still King

10:30 AM - 11:30 AM
SALONS FGH

In the realm of finance, with its increasingly complex rules and risk metrics, managing the basics remains of utmost importance. Learn how these CFOs use foundational finance, including attention to basic banking, automated systems and accounting measures, to position their companies for success. We'll review cash optimization, funding strategies, and more.

Jeff Dykstra

Principal, KPMG US

Jeff Dykstra is a Principal at KPMG in the Financial Services Risk, Regulatory and Compliance practice. With over 18 years of experience advising financial services firms, Jeff's focus is helping large banks and capital markets clients transform finance and risk to achieve cost-efficient and effective operations by helping them improve data access, data quality and analytical capabilities. He currently leads KPMG's growing U.S. Treasury practice, serving an expert on interest rate, liquidity, resolution and recovery planning to Treasurers and CFOs of the largest financial institutions in the U.S.

Prior to joining KPMG, Jeff served on the expert witness team in the Lehman Barclays matter and was a member of the balance sheet management group at ABN AMRO NA. Jeff holds a Bachelor's degree from Western Michigan University.

Chris Caprio

Chief Financial Officer, Focus Technology

Chris Caprio is the Chief Financial Officer of Focus Technology where he joined in 2017. Focus is a SOC 2 certified leading information technology company with expertise in next-generation infrastructure, managed services, cloud solutions and cyber security. Chris lends his 20+ years of experience in strategic planning, forecasting and reporting key financial data to asses the business and make quick and confident decisions. During his tenure, he has been a key contributor to the company's modernization, transformation and record company growth where the company has been recognized for awards such as CRN Top 500, MSP Security Top 100, Inc 5000 & BBJ Largest Private Companies. Chris was a 2022 BBJ CFO of the Year award winner. Recognized as an industry thought leader, Chris serves as President of FEI Boston, Advisory Board of the CFO LC and is a sought-after speaker at various industry events.

Prior to Focus, Chris served as a CFO of a PE portfolio company in the Energy Space and North American CFO of a French Public Engineering company. Chris lives in Lynnfield with his wife and three teenage daughters. Outside of work, he enjoys working out at his wife's fitness studio, playing golf, coaching his daughters and walking his dogs.

Kelly MacDonald

Chief Financial Officer, Dynavax

Kelly MacDonald is Chief Financial Officer at Dynavax, where she leads the finance and accounting functions to execute the company's strategic and financial objectives in support of its mission to help protect the world against infectious diseases. As a member of Dynavax's Senior Leadership Team, Ms. MacDonald has played an integral role in driving Dynavax's strong financial position and has led several important initiatives at the company, including advancing its efforts to foster an inclusive workplace and build a values-driven culture. She joined Dynavax in 2021 from Ironwood Pharmaceuticals where she served in roles of increasing responsibility, including as Chief Accounting Officer and Vice President, Finance, leading the company's corporate accounting and finance processes, enterprise risk management, treasury and capital allocation strategy. While at Ironwood, Ms. MacDonald also played an integral role in providing financial counsel on the company's strategic planning, accounting policies, R&D portfolio management, global business development, product launches and commercial execution.

She is a Certified Public Accountant and holds a Bachelor of Science in accounting from Fairfield University and a Master of Business Administration from the Isenberg School of Management at the University of Massachusetts Amherst.

Dustin Pederson

Chief Financial Officer, Locus Robotics

Dustin Pederson is the Chief Financial Officer at Locus Robotics, a subscription-based autonomous mobile robot and software solution focused on helping distribution and fulfillment warehouses become more efficient. Prior to Locus, he held roles at Cogito Corporation, EF Education First, Pegasystems, and Honeywell International.

Through his career he has focused on growing & developing high-performing teams and working cross-functionally to help companies identify and take advantage of opportunities to maximize performance. Dustin holds a BS in Accounting & Finance from the University of Minnesota and an MBA from Northwestern University's Kellogg School of Management. He currently resides in the Boston-area with his wife and two children.

Jason Quinn

Chief Financial Officer & Chief Operating Officer, Vendr

Jason Quinn is Vendr's Chief Financial Officer and Chief Operating Officer, leading the company's go-to-market and operations. Having scaled companies from product-market fit through IPO and raising $2.3 billion in capital markets along the way, his 19 years of deep experience have enabled him to successfully manage high-growth companies under the toughest conditions. During his first five years in the field, he served as the European Finance Executive at Cimpress as an expat living in Spain, starting and scaling their international business to over $500M in revenue. Upon returning to the United States, Mr. Quinn joined DraftKings as Head of Finance and scaled the young company through challenging times and ultimately through their IPO. Following this success, he joined DataRobot as SVP of Finance, responsible for strategic and operational management of all aspects of finance, business development, strategic partnerships, and corporate development. Now, he brings his wealth of experience to a rapidly-scaling Vendr as they fix how companies buy and sell software. Mr. Quinn graduated from Bentley University and currently resides in Dover, MA with his family.

LUNCHEON KEYNOTE PANEL

Leadership Lessons

12:15 PM - 1:15 PM
GRAND BALLROOM

The importance of CFO leadership has never been more visible as today. Learn how these CFOs deliver results for their companies as they manage near-in events and execute on long-term goals.

Nina Trentmann

Corporate Finance Team Leader, Bloomberg News

Nina Trentmann joined *Bloomberg* in January 2023 to lead its coverage of investment-grade bonds and loans, structured finance, ESG and Latin American & Canadian credit markets. She previously served as a Bureau Chief at the *Wall Street Journal*. Nina relocated to the U.S. in July 2019 after three years with the *WSJ* in London, during which she covered corporate finance at European and British companies. Prior to her time with the *WSJ*, she worked as a U.K. Business and Finance Correspondent for German media group Welt. She took on this role in August 2013, after her return from Shanghai, where she covered business and finance at Chinese and international firms.

Nina underwent journalistic training with German media group Welt in Berlin and worked for local publications in Germany. In 2012, she was awarded the "Georg von Holtzbrinck Preis für Wirtschaftspublizistik"—a prize for business reporting in Germany—for a story about surging pig exports to China. Nina studied Political Science, Modern History and American Studies at Bonn University in Germany and attended business and finance classes at Georgetown University in the U.S. She also holds a master's degree in Media and Global Communications from the London School of Economics and Fudan University in Shanghai.

Carolina Dybeck Happe

Senior Vice President & former
Chief Financial Officer, GE

Carolina Dybeck Happe is Senior Vice President and the former Chief Financial Officer of GE. As CFO, she was responsible for leading GE's overall financial strategy and global finance organization, and was a driving force behind the company's planned transformation into three industry-leading, global investment-grade public companies, in the critical sectors of healthcare, energy and aerospace. Her efforts were critical to the Company's $100 billion debt reduction, its successful spin off of GE Healthcare and earnings growth exceeding 50% in 2022. She also led the company's core Digital Technology function and is an executive sponsor of GE's women's network. She currently serves on the Board of Directors of Ericsson and previously served as a director of Schneider Electric and E.on.

Prior to joining GE, Carolina was Chief Financial Officer at Maersk, where she executed a substantial deleveraging plan and reshaped the company's portfolio to deliver more profitable growth. She also spent 16 years at Assa Abloy, including seven as Chief Financial Officer during which the company delivered total shareholder return of 170 percent, and she played a key role in leading both finance and technology to transform the company into a global, digitally enabled leader. Carolina has lived in seven different countries and speaks four languages. She received a Master of Science in Business and Economics from Upsala University.

DELTA

Dan Janki

Chief Financial Officer, Delta

Dan Janki is Executive Vice President and Chief Financial Officer of Delta Air Lines. Dan leads Delta's Finance organization, which includes financial reporting, the controller organization, corporate audit, financial planning, investor relations, treasury, fleet and TechOps supply chain, fuel management, including our refinery, supply chain management, and corporate strategy.

He also serves on the Delta Leadership Committee, a group of the airline's top executives who work closely with CEO Ed Bastian on the company's strategic vision and direction.

Prior to joining Delta in July 2021, Dan enjoyed a long tenure with General Electric, most recently serving as President & CEO of GE Power Portfolio and Senior Vice President of GE. He has more than 25 years of experience at GE in a wide variety of senior roles at GE Energy, GE Capital, GE Global Operations and GE Corporate.

Honeywell

Greg Lewis

Senior Vice President & Chief Financial Officer, Honeywell

Since joining Honeywell in 2006, Greg has held a series of finance leadership roles. Most recently, he was Vice President of Corporate Finance, where he led Treasury, Tax, Audit, Business Analysis and Planning, Investor Relations, M&A, Real Estate, Pension, Finance Operations and Enterprise Information Management (EIM). He focused on building a culture of managing data and information as a strategic asset.

Previously, Greg first served as CFO of the former Specialty Products unit within Performance Materials and Technologies (PMT). Subsequently, he served as Vice President of Business Analysis and Planning (BAP), CFO for Honeywell Process Solutions (HPS) and then held the same position for Automation and Control Solutions (ACS).

With a broad background in financial leadership across multiple industries, Greg began his career at Kraft Foods in 1991 and went onto roles at Tyco International, A&E and the Stanley Works.

Greg holds a master's degree in business administration from Fordham University and a bachelor's degree in finance from the University of Connecticut. He is also Six Sigma Green Belt Certified.

Successful M&A: Managing Transactions and Market Cycles

1:30 PM - 2:30 PM
GRAND BALLROOM

CFOs hold an important role not only in the mechanics of ensuring a successful merger or acquisition, but also in the decision making that leads up to, and follows, a deal. More than ever before, with the economy cycling through stages of strength and slowdown, financial executives must lead with vision, execute with precision and ensure appropriate value capture. We'll hear from CFOs experienced in leading through deals, including acquirers and acquirees.

McKinsey&Company

Liz Wol

Partner, McKinsey & Company

Liz Wol is a Partner in McKinsey's Health Systems and Services (HSS) and Strategy and Corporate Finance (S&CF) practices and the global co-lead of McKinsey's M&A Capability Building service line and Programmatic M&A Hub. She primarily advises healthcare clients on topics related to enterprise strategy and growth, optimal resource allocation, and M&A—including M&A strategy, proactive deal sourcing, integration planning, and M&A capability building. She also co-leads McKinsey recruiting at Columbia Business School.

She has a B.A. magna cum laude from Dartmouth College and a M.B.A. with Dean's Honors from Columbia Business School.

WilmerHale

Andrew Bonnes

Partner, WilmerHale

As a leading corporate lawyer and trusted business advisor, Andrew Bonnes focuses his practice on mergers and acquisitions and public company counseling. He has represented buyers, sellers, boards of directors, significant investors, financial advisors and other interested parties in mergers, acquisitions, divestitures, investments, joint ventures, alliances, PIPEs and other strategic transactions across a broad range of industries. He has also advised public companies on a variety of corporate matters, including corporate governance, fiduciary duties, securities law compliance and defensive measures. Learn more about his practice and how he can support your startup on WilmerHaleLaunch.com. Andrew maintains an active pro bono practice, representing organizations such as Digital Public Library of America and Epilepsy Foundation New England on a variety of matters.

He was named to *Boston Magazine*'s inaugural Top Lawyers list in 2021 and 2022 in the area of corporate law. Additionally, he was recommended in the 2019 edition and named a "Next Generation Lawyer" in the 2022 edition of *The Legal 500 United States* for his work in M&A: Middle-Market. Andrew has a BA from Dartmouth College and a JD from the University of Pennsylvania.

Paul Mozak

Executive Vice President & Chief Financial Officer, Blue Cross Blue Shield of Michigan

Paul Mozak is Executive Vice President and Chief Financial Officer for Blue Cross Blue Shield of Michigan, a $32 billion diversified health insurance company with subsidiaries in property and casualty insurance, managed Medicaid, and technology services. He has held this position since August 2021. Previously, he served as senior vice president and chief risk officer and has been with BCBSM since 2008. In his tenure at BCBSM, Paul has overseen the growth of the investment portfolio to $12 billion with returns to the company consistently above relative benchmarks, launched Bricktown Capital, a Registered Investment Advisor, Woodward Straights, an industry-leading captive insurance company, created two VEBA's to fund post retirement medical benefits, and established innovative inter-company money pool liquidity facilities. Paul leads the financial aspects of the company's mergers and acquisitions, actuary, financial reporting, tax, and enterprise finance.

Before joining Blue Cross in 2008, he served as CFO at H&R Block Financial Advisors Inc., leading the sale of the company to Ameriprise. He also held positions at Arthur Andersen earlier in his career. He received a bachelor's degree in accounting from Michigan State University and a master's degree with high honors from the University of Michigan. He is a licensed CPA and has held Series 27, 24, and seven securities licenses and is a member of the Michigan Association of Certified Public Accountants.

Josias Pontes

Former Chief Financial Officer, Sigilon Therapeutics

Josias Pontes is the former Chief Financial Officer of Sigilon Therapeutics, Inc., where he helped prepare the company for its IPO in 2020, which raised roughly $145 million. Most recently, Mr. Pontes was involved in the merger and acquisition process that resulted in Eli Lilly's acquisition of Sigilon for up to $310 million. Before joining Sigilon, Mr. Pontes held the position of Senior Director, Financial Planning and Analysis at Zafgen, Inc., a biotechnology company, from December 2017 to August 2019. Mr. Pontes held the position of Senior Director of Finance at Juniper Pharmaceuticals, Inc. from 2016 to 2018. Mr. Pontes also worked in various finance roles of increasing responsibility at Genzyme, most recently serving as the Senior Director of Finance for the Rare Diseases business unit with 8 different commercial drugs. At Genzyme, he spent over a decade in different positions, leading the finance function to support the significant and rapid growth of the rare diseases business in Latin America and in the U.S. Mr. Pontes had multiple roles at Genzyme, working as Head of Finance and Controller at a country level in Brazil, Chile and Venezuela as well as at a regional level as Senior Director of Finance, Regional Controller Latin America. He has also held progressive finance positions in other companies, in manufacturing and commercial settings of different industries such as air conditioning and automotive. Mr. Pontes began his accounting career at a United Steel Corporation subsidiary at the age of 15 and had approximately 8 years of accounting experience when he joined Price Waterhouse (now PricewaterhouseCoopers). He obtained his CPA designation in São Paulo, Brazil. He has an MBA from Ohio University and a B.A. in Accounting from FECAP University in São Paulo, Brazil.

Alex Triplett

Chief Financial Officer & Chief Operating Officer, Appfire

Alex Triplett is Chief Financial Officer and Chief Operating Officer at Appfire, a leading global provider of next-generation software that enhances, augments, extends, and connects the world's leading platforms such as Atlassian, Microsoft, Salesforce, and monday.com. Alex is responsible for capital structure, capital allocation, investor relations, operational scalability, financial objectives, and shareholder returns. Prior to Appfire, Alex served as Global Head of Corporate Development for TA portfolio company ION Group and CFO for ION's Corporates Division. Prior to Appfire, Alex served as Global Head of Corporate Development for ION Group. During his time at ION, Alex closed 22 acquisitions worth $11 billion in Enterprise Value, raised and refinanced $27.5 billion of debt and drove ION's growth from a single division and 600 people to 12,000 people across 5 divisions. He also managed ION's captive PE vehicle that completed minority and majority investments in a variety of software businesses and purchased LP stakes in technology VCs. Prior to ION Alex was an investor at TA Associates. Alex holds a B.S. in Commerce from the McIntire Business School at University of Virginia and is based in New York.

The Customer-Centric CFO

1:30 PM - 2:30 PM
SALONS FGH

The customer experience is vital to the success of every company. In this session, CFOs will share how they interact with customers and incorporate those insights into strategic planning, financial decision-making and resource allocation.

UBS

Sinclair Ridley-Thomas

Managing Director, UBS Financial Services Inc

Sinclair Ridley-Thomas leads TMT Private Placements in the Private Financing Markets group at UBS and is based in San Francisco where he focuses on connecting transformational companies with leading institutional investors.

Prior to UBS, Sinclair founded the Private Capital Markets team within Equity Capital Markets at Citi. Sinclair has raised $15bn+ in private capital for growth companies across all sectors and has built deep investor relationship with growth equity, private equity, sovereign wealth, crossover, special situations and institutional family office investors. Sinclair has raised all forms of equity and equity-linked capital for primary and secondary uses of proceeds.

Sinclair has also held leadership roles at RBC Capital Markets, JMP Securities and PwC. Sinclair earned a Bachelor's Degree in Finance from Morehouse College and a Master's in Business Administration from USC's Marshall School of Business where he was a Consortium Fellow.

aspentech

Chantelle Breithaupt

Chief Financial Officer, Aspen Technology

Chantelle Breithaupt holds the position of Chief Financial Officer & Senior Vice President at Aspen Technology, Inc., a leading software provider in asset optimization, helping customers solve the dual challenge of increasing standards of living in a sustainable manner. She has 15 years of global industrial experience within General Electric and 8 years of Sales, Software and Customer Experience at Cisco in the Silicon Valley Technology industry. As an innovative thinker, she has demonstrated success by developing and seamlessly executing financial strategies in complex organizational structures. In 2021, she was recognized by DiversityFirst as a Top 50 Financial Leader, recognizing her efforts in the diversity areas of both gender and ethnicity. She was recognized with the YWCA Silicon Valley Tribute to Women Award in 2018 for both excellence in Finance and significant contributions to Silicon Valley executive leadership. This is one of her most cherished achievements. In 2019, Cisco awarded her the honor of the Multiplier Effect award which recognizes the promotion and proximity to diverse employees.

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Nathan Gooden

Chief Financial Officer, SquareSpace

As Chief Financial Officer and Treasurer, Nathan Gooden oversees finance, treasury, and corporate development functions at SquareSpace. Nathan brings more than 25 years of financial experience. He joins SquareSpace from Amazon where he acted as the Chief Financial Officer of Amazon Alexa WorldWide for over five years. Prior to Amazon, Nathan served as Chief Financial Officer across several fields, including payments, social commerce, and consumer electronics. Nathan began his career at Pricewaterhouse-Coopers, where he spent five years as a lead auditor. He holds a Bachelor of Science degree in Accounting from Oral Roberts University.

Timothy Mammen

Chief Financial Officer and Senior Vice President, IPG Photonics Corporation

Timothy (Tim) Mammen has served as IPG's Chief Financial Officer since July 2000 and a Vice President since November 2000. He was promoted to Senior Vice President in February 2013. Between May 1999 and July 2000, Tim served as the Group Finance Director and General Manager of the United Kingdom operations for IPFD. He was Finance Director and General Manager of United Partners Plc, a commodities trading firm, from 1995 to 1999 and prior to that he worked in the finance department of E.I. du Pont de Nemours and Company.

Tim holds an Upper Second B.Sc. Honours degree in International Trade and Development from the London School of Economics and Political Science. Also, he is a Chartered Accountant and a member of the Institute of Chartered Accountants of Scotland.

Chris Sands

Chief Financial Officer, IntelyCare

As CFO, Chris is responsible for IntelyCare's financial strategy and operations. He is passionate about technology disrupting healthcare by driving efficiencies that lower costs, and he is proud of the role IntelyCare is playing in the pursuit of this mission.

Prior to joining IntelyCare, Chris served as CFO of MineralTree for three years until its sale in 2021. Earlier in his career, Chris held senior finance positions at ThermoFisher Scientific and EnerNOC following several years of investment banking and equity research experience at Barclays and J.P. Morgan.

Chris earned a B.S. from Lehigh University with majors in Finance, Accounting, and Economics and an M.B.A. from the University of Virginia. He is a CPA and CFA charterholder.

Balancing Risks, Rewards and Results

2:30 PM - 3:30 PM
GRAND BALLROOM

Different economic times require different risk assessment and management skills. Changes in the banking landscape, technology resources, regulatory environment and market sentiment all have an impact on company operations. How does the CFO manage this new economy? Learn what CFOs are seeing "in the wild" when it comes to managing risks and rewards as they consider future results.

John Carrier SCD '95

Senior Lecturer, System Dynamics Group, MIT Sloan

Dr. John Carrier is a Senior Lecturer of System Dynamics at the MIT Sloan School of Management. He instructs senior managers on improving manufacturing and business processes and serves as an on-site coach in support of projects. His research focuses on strategic marketing and new business development in high technology, specialty chemicals, and service segments. Dr. Carrier has more than 15 years of experience in a variety of corporate, entrepreneurial, and consulting environments. Since 2006, he has worked with Arsenal Capital Partners as director of Six Sigma, where he is responsible for increasing portfolio company valuation by adapting and applying Six Sigma techniques to midsize companies. He also handles due diligence, post-merger integrations, and financial analysis and improvement. Prior to joining Arsenal Capital Partners, he was employed by Grace Construction Products; Bain & Company, Inc.; and SuperCool LLC.

He holds a BS in chemical engineering from the University of Michigan, a PhD in chemical engineering from MIT, and an MBA from Harvard Business School.

Peter Banat

Chief Financial Officer, Bay State Milling

As Chief Financial Officer at Bay State Milling, Peter Banat is responsible for the development and execution of the company's strategic financial objectives, alignment of the Finance, Control and Corporate Services functions, as well as systems modernization. Peter has over 30 years of experience in Finance specializing in manufacturing and consumer products enterprises. He has most recently held the position of Chief Financial Officer at the Evenflo Company and Euro-Pro Holdings. His extensive background includes leadership roles in both national and global organizations such as Pepsico and Goodyear. Proficient in Spanish and Portuguese, he is a graduate of the University of Pennsylvania and earned his MBA from the University of Michigan, Stephen M. Ross School of Business.

Daniel Berger

Senior Vice President, Head of Tax Insurance, Lockton

Daniel Berger is the Senior Vice President and Head of Tax Insurance at Lockton. He focuses on protecting clients from tax risks associated with tax credit investments, M&A transactions and other situations. Daniel and his team of former tax attorneys craft bespoke insurance solutions for the most complex, critical and high-stakes tax risks.

Before joining Lockton, Daniel led tax insurance underwriting for AIG in North America. He previously worked as a Tax Director at Brookfield Asset Management and as an Associate at Moelis & Company, both in New York. Daniel began his tax career as an attorney at Proskauer Rose, where he advised on various transactional tax matters.

Daniel graduated magna cum laude with a Bachelor of Arts from New York University. He also has a J.D. from the University of Pennsylvania Carey Law School and a Certificate of Study in Business Economics and Public Policy from The Wharton School. He received his LL.M. in taxation from New York University School of Law.

David Chavez

Senior Vice President & Chief Financial Officer, Shared Services, CVS Health

David Chavez is CVS Health's Senior Vice President and Chief Financial Officer of Shared Services. David provides strategic leadership to the finance organization, including the execution of a multi-year plan to transform the function focusing on People, Technology, and Process Excellence & Innovation.

Born and raised in Mexico, David brings more than 20 years of diverse experience from a range of industries and leadership positions in finance, accounting and risk management, including most recently serving as Chief Financial Officer, Latin America for Marathon Petroleum Corporation. Prior to that, David served in several leadership roles in Finance, Accounting, Risk and Compliance for several companies including Andeavor, DreamWorks Animation, Deloitte, Dell Technologies, General Electric and Ernst & Young.

David is an avid supporter of Diversity and Inclusion, and he is extremely passionate about transformation and technology. In 2021 he was recognized as one of the Top 10 Hispanic Executives by the *Hispanic Executive Magazine*. He is an avid fan of Formula 1 Racing and loves to spend time with his 3 daughters.

Sarah Romano

Chief Financial Officer, First Wave BioPharma, Inc.

Sarah Romano, CPA, was appointed as Chief Financial Officer of First Wave BioPharma in March 2022. She previously served as Chief Financial Officer of Kiora Pharmaceuticals, Inc. (NASDAQ: KPRX) (formerly EyeGate Pharmaceuticals, Inc.), a clinical-stage specialty pharmaceutical company developing products for treating ophthalmic diseases, from February 2017 through February 2022 and as its Corporate Controller from August 2016 to January 2017. Prior to joining Kiora, Ms. Romano served as Assistant Controller at TechTarget from June 2015 through August 2016 and Corporate Controller at Bowdoin Group, a healthcare-focused executive recruiting firm, from September 2013 through May 2015. Previously, she held financial reporting positions of increasing responsibility at SoundBite Communications from 2008 until its acquisition by Genesys in 2013, and at Cognex Corporation from 2004 through 2008. Ms. Romano began her career as an Auditor in the Boston office of PricewaterhouseCoopers. A licensed CPA in Massachusetts, she holds a Bachelor of Arts in Accounting from College of the Holy Cross and a Master of Accounting from Boston College.

Talent in the Finance Function

2:30 PM - 3:30 PM
SALONS FGH

The finance function encompasses a myriad of expertise from controls to reporting, automating to analyzing, and interpreting to forecasting. In addition, CFOs must be able to work independently and collaboratively within and across business units. Learn how to attract, train, and retain the right talent for your company, including roles and function.

McKinsey&Company

Ankur Agrawal

Partner, McKinsey & Company

Ankur Agrawal is a Partner in McKinsey & Company's New York office. He is one of the leaders of the North America Healthcare Systems & Services Practice, with a focus and passion for counseling leading pharmaceutical and medical device companies on strategy and corporate finance topics, including healthcare services and technology. He leads the CFO/Finance service line in the Americas and has presented the firms' perspectives at CFO forums in New York, London and São Paulo. Prior to his McKinsey experience, he worked as a Vice President of Finance at a New York-based startup Gerson Lehrman Group that received Series A and Series B funding from Bessemer Venture Partners/Silver Lake Partners and as a President's Fellow at Harvard University.

Mr. Agrawal received his B. Eng. degree in Mechanical and Electrical Engineering from IRIM&EE, India. As part of his course work, he was designated a Chartered Engineer from Engineering Council, UK. He also received his MBA from Harvard Business School and graduated as a Baker Scholar and a Loeb Fellow in finance.

HubSpot

Kate Bueker MBA '98

Chief Financial Officer, HubSpot

Kate Bueker is the Chief Financial Officer at HubSpot, where she manages the company's finances, and is also the co-executive sponsor of the Women@HubSpot employee resource group. Kate has also served on the Procore Technologies, Inc. board of directors since April 2021.

Prior to HubSpot, Kate spent eleven years in finance and business development leadership roles at Akamai Technologies and most recently served as senior vice president of business finance and operations. During her tenure, Kate was instrumental in building out the finance business support capabilities and function at Akamai. Kate also spent almost 10 years in investment banking at The Blackstone Group, UBS, Credit Suisse and Donaldson, Lufkin & Jenrette.

Outside of work, Kate loves to travel (especially throughout Italy) and enjoys tennis and golf. Kate received her BA in mathematics from Cornell University and her MBA from the Massachusetts Institute of Technology. Kate currently serves on the Board of Procore and Bridge Over Troubled Waters.

Kim Dodge

Former Chief Financial Officer, Ibex Medical Analytics

Kim Dodge is the former Chief Financial Officer at Ibex Medical Analytics, providing revolutionary AI powered diagnostic solutions to pathologists to detect cancer. Ibex just closed a $55M Round C to help accelerate growth.

Prior to Ibex, she was the CFO for Tempo Software and was part of the team growing ARR from to over $100M.

She is a creative and strategic CPA with extensive experience in software and services organizations with public company, PE and VC sponsors. She is a key leader in the development and execution of turnaround, growth, M&A, fundraising and exit strategies.

Kim provides expert leadership and develops critical team alignment to execute strategy and complex programs.

Kim's organizational experience spans small-mid sized enterprises and large, multi-national companies such as Sodexo, Philips Medical Systems, WPP Group and growth companies Connance, Tempo and Ibex Medical.

Kim is a prior member of Launchpad Venture Group, providing angel investing and advice to early-stage technology driven companies. She is a current volunteer at E for All, accelerating economic and social impact in communities nationwide through inclusive entrepreneurship.

Ravi Ragnauth

Partner, Chief Financial Officer, Berkshire Residential Investments

Ravi Ragnauth serves as the Chief Financial Officer at Berkshire. In his position, Ravi is responsible for overseeing Financings Across Debt and Equity Investment Strategies, Corporate Finance & Accounting, Treasury, Tax, Portfolio Reporting & Analytics, and Investor Reporting. He also serves as a member of Berkshire's Investment Committee.

Prior to joining Berkshire, Ravi served as the Chief Financial Officer at the Davis Companies. During his tenure at the Davis Companies, Ravi was responsible for overseeing the firm's financial operations, including capital markets, debt placement, accounting, tax, budgeting, treasury, and implementation of all financial and risk management strategies. He also led the firm's information technology and human resources benefits. Ravi has 25 years of experience in the real estate industry, including previous employment at the Moinian Group, Fannie Mae and Ernst and Young LLP.

Ravi received a Master of Business Administration from the University of Maryland UC and is a Chartered Accountant. Ravi is also a director of the Real Estate Finance Association (REFA) Boston.

Andrea Spinelli

Managing Director, Protiviti

Andrea Spinelli is a Managing Director of Business Performance Improvement in the Boston office of Protiviti, and leads the East Region Managed Business Services (MBS) practice. She has more than 22 years of experience in business performance improvement, specializing in finance optimization solutions including process design, re-engineering, shared services and managed business services. Her background includes over 20 years of a combination of Big Four external audit industry finance and operations, and management consulting experience. Her industry expertise includes Healthcare and Life Sciences; Consumer Products;Telecommunications; Software and Technology and Financial Services.

She has a BS in Accounting from Fordham University and an MBA from Georgia State University. She is also a CPA.

4:00 PM - 4:30 PM
GRAND BALLROOM

THE DIVERSIFIED CFO:
From CVS to Lowe's to Pfizer

No company has been busier these last few years than Pfizer. And no CFO has had a more unique trajectory than David Denton of Pfizer. In this fireside chat, learn how David approaches these many changes and continues to stay rooted in what's most important.

AFTERNOON
FIRESIDE CHAT

MIT MANAGEMENT SLOAN SCHOOL

Jonathan Fleming

Senior Lecturer, Trust Center for MIT Entrepreneurship

Jonathan J. Fleming has been founding, financing and operating breakthrough life science companies for over 30 years in the USA, Europe, Asia, and the Middle East. During his career he has raised more than $1 billion for early stage investment funds that made more than 200 investments resulting in over 20 IPOs and 40 M&A events. Mr. Fleming has been the CEO of a neuroscience company, been the chairman of the board of numerous companies, and been a director of many public and private companies. He has participated in the creation of numerous companies and has worked with seven different Nobel laureates to create and build companies based upon their work.

Jonathan has been a senior lecturer at MIT Sloan School of Management since 2002. He has an MPA from Princeton University's Woodrow Wilson School and a BA from the University of California, Berkeley.

David Denton

Chief Financial Officer & Executive Vice President, Pfizer Inc.

Dave M. Denton is the Chief Financial Officer and Executive Vice President for Pfizer. Dave is a member of Pfizer's Executive Leadership Team (ELT), providing strategic global financial leadership. Dave leads the corporate finance functions including audit, treasury, tax, insurance, operations planning and analysis (OP&A), corporate controllership, and business finance and analytics. Dave has more than 25 years of finance and operational expertise, including more than 20 years in the healthcare sector. As a result, he brings to Pfizer a unique perspective on the role of payers, the needs of patients, and the rapidly evolving healthcare landscape.

Prior to joining Pfizer, Dave was the CFO and Executive Vice President of Lowe's Companies Inc. He joined Lowe's in 2018 and was responsible for all of Lowe's financial functions and processes. This includes corporate finance and treasury, strategy, real estate, accounting, tax, internal audit and risk management.

Before joining Lowe's, he served as executive vice president and CFO of CVS Health, where he was responsible for all aspects of financial planning and management. Dave played a key role in CVS's transformational journey from a retail pharmacy to the health solutions company it is today and led the full integration of Caremark into CVS. In December 2017, he played a pivotal role in one of the largest healthcare transactions in history when CVS acquired Aetna—structuring and negotiating the terms and financing for the transaction.

Before being named the CFO of CVS Health, Dave held several leadership roles at CVS, including Senior Vice President and Controller/Chief Accounting Officer. Prior to CVS, Dave was with the management consulting firm of Deloitte Touche Tohmatsu.

Dave earned a bachelor's degree in business administration from Kansas State University and an MBA from the Babcock Graduate School of Management at Wake Forest University. He serves on the board of Tapestry, Inc.

MAY 14, 2024

ROYAL SONESTA HOTEL, CAMBRIDGE, MA

Join CIOs and other senior business executives from around the world for the 21st annual MIT Sloan CIO Symposium at the Royal Sonesta Hotel in Cambridge, Massachusetts on May 14, 2024. The 2024 CIO Award Dinner and Innovation Showcase reception will take place on Monday, May 13.

The MIT Sloan CIO Symposium is the nation's premier CIO event bringing together information technology executives and leading faculty from MIT. We gather to explore how leading-edge academic research and innovative technologies can help address the practical challenges faced in today's volatile business environment and economy. The annual event offers interactive learning and thought-provoking discourse on the future of technology, best practices, and business that is not available anywhere else. It includes presentations, panels, networking and a closing reception. The annual MIT Sloan CIO Symposium began in 2004 and continues to adapt to changing times.

FOR MORE INFORMATION

Contact the Organizing Team at info@mitcio.com.

SCENES FROM 2022


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