MIT SLOAN
CFO SUMMIT

THE INTENTIONAL CFO: INNOVATIVE & PRAGMATIC

The 22nd Annual MIT Sloan CFO Summit

November 21, 2024

DEAR FRIENDS, Welcome!

As we round the corner to 2025, we know that as Chief Financial Officers you are looking ahead with new ideas, motivation, and persistence.

We are so proud that 400+ CFOs and Senior Financial Executives have opted to spend the day learning and networking at the 22nd annual MIT Sloan CFO Summit.

This year's theme, "**The Intentional CFO: Innovative and Pragmatic**" acknowledges the need for Chief Financial Officers to be forward-looking and practical. That you navigate the continued evolution in financial technology, public policy and business practices, while maintaining your company-specific characteristics and contributions to success.

We are delighted to open the conference with **How to Measure a 'Fit for Purpose' Culture**, with Donald Sull, Professor of the Practice at the MIT Sloan School of Management, where he directs the Strategic Agility Project and the Culture 500. *The Economist* has named Donald "a rising star in a new generation of gurus."

We also look forward to his fireside chat, **A View into Kenvue: Agility and Experience**, with Paul Ruh, MBA '96, Chief Financial Officer, Kenvue. Kenvue was formerly the Consumer Health division of Johnson & Johnson, and was spun out as an independent consumer health company with leading brands such as Aveeno, Listerine and Visine.

Laura Gassner Otting, our morning keynote, is a bestselling author, catalyst and executive coach. Laura will share **Practical Strategies for Architecting Success**—how to manage initial success as well as the next challenge.

Our featured luncheon panel, **Leading with Intention**, includes CFOs from ADP, Moody's and Nasdaq, led in conversation by Walden Siew, Bureau Chief, CFO Journal, *The Wall Street Journal*. These companies collectively represent more than 24 decades in business, with leadership across payroll and HR solutions, corporate risk analytics, and capital markets liquidity. We look forward to their insights into purposeful evolution.

Our breakout panels today are organized along two tracks. The first track offers structural perspectives: how CFOs lead through shifts in industry or market function. These panels include **Smart & Savvy FP&A**; **CFO Best Practices**; and **GenAI in Finance**. The second track offers situational perspectives: how CFOs manage through temporal events. These panels include **M&A: Strategic, PE and Other Opportunities**; **Partnering with Your CTO**; and **Impact and Opportunity of Changing Interest Rates**.

In our closing fireside chat, **Aramco: the $2 Trillion Energy Company with 91 Years of History**, we are honored to host moderator Francis O'Sullivan, Managing Director, S2G Ventures & Senior Lecturer, MIT Sloan School of Management in conversation with Ziad T. Al-Murshed, MBA '16, Executive Vice President and Chief Financial Officer, Saudi Armaco.

Following this discussion, you are invited to join us in closing out the conference at our **Networking Reception**—a chance to continue your conversations 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. This group of men and women who dedicate themselves to this effort are listed to the right. As you enjoy today's premier CFO Summit, please say thank-you to these volunteers.

The reputation and value of the CFO Summit enables us to partner with thought leaders in their respective industries. Of special note, we thank our knowledge partner, McKinsey & Company. We also thank our gold level sponsors, Cprime, G-P, UBS and WilmerHale and our silver level sponsors KPMG, OneStream and Robert Half/Protiviti. 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.

Learn much, network well, and again, thank you for your participation! An exciting and educational day is ahead.

Jeremy Seidman MBA '03
Executive Chair, MIT Sloan CFO Summit

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Chief Financial Officer, Trexon

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
Executive Chair, MIT Sloan CFO Summit

8:30 AM – 9:00 AM
WELCOME TO MIT SLOAN CFO SUMMIT | GRAND BALLROOM
How to Measure a 'Fit for Purpose' Culture
DONALD SULL
Professor of the Practice, MIT Sloan

9:00 AM – 9:30 AM
MORNING FIRESIDE CHAT | GRAND BALLROOM
A View into Kenvue: Agility and Experience
M **DONALD SULL**
Professor of the Practice, MIT Sloan
PAUL RUH MBA '96
Chief Financial Officer, Kenvue Inc.

9:30 AM – 10:00 AM
MORNING KEYNOTE | GRAND BALLROOM
Practical Strategies for Architecting Success
LAURA GASSNER OTTING
Author, Catalyst and Executive Coach

10:00 AM – 10:30 AM
GRAND BALLROOM FOYER
Morning Coffee Break

10:30 AM – 11:30 AM
TRACK 1: STRUCTURAL | GRAND BALLROOM
Smart & Savvy FP&A
M **RYAN KENNEY**
Managing Director, Finance Transformation, KPMG
VALERIE BAUER GORE
Chief Financial Officer, Knack
LUDOVIC MONCHAL
Chief Financial Officer, Americas, Dassault Systems
DOUG ORSAGH
Vice President of Value Transformation, OneStream
DEREK WARNICK MBA '09
Co-Founder and Chief Financial Officer, Electric Hydrogen Company

TRACK 2: SITUATIONAL | SALONS FGH
M&A: Strategic, PE and other Opportunities
M **JEFF RUDNICKI**
Senior Partner, McKinsey & Company
LOUIS J. ARCUDI III
Former Chief Financial Officer, Amolyt Pharma
SHU JIANG
Finance Executive, Private Equity Backed Tech/Service Companies
MARK NASIFF
Chief Operating Officer and Chief Financial Officer, Lookout
DANIEL O'SHAUGHNESSY
Chief Financial Officer, Formlabs

11:30 AM – 12:00 PM
GRAND BALLROOM FOYER
Luncheon Buffet

12:15 PM – 1:15 PM
LUNCHEON KEYNOTE PANEL | GRAND BALLROOM
Leading With Intention
M **WALDEN SIEW**
Bureau Chief, CFO Journal, *The Wall Street Journal*
NOÉMIE HEULAND
Chief Financial Officer, Moody's
DON MCGUIRE
Chief Financial Officer, ADP
SARAH YOUNGWOOD
Executive Vice President and Chief Financial Officer, Nasdaq

1:30 PM – 2:30 PM
TRACK 1: STRUCTURAL | GRAND BALLROOM
CFO Best Practices
M **ANDY WEST**
Global Co-leader of Strategy & Corporate Finance Practice, McKinsey & Company
BETH CLYMER
President, Finance, Strategy & Administration, Canada Goose
KEVIN MESSERLE MBA '03
Chief Financial Officer, York Space Systems LLC
KONSTANTIN POPOV
Vice President, Enterprise Portfolio & Financial Management, Cprime
RENIKA SEHGAL
Chief Financial Officer, Biofourmis

TRACK 2: SITUATIONAL | SALONS FGH
Partnering With Your CTO
M **ANDREA SPINELLI**
Managing Director, Protiviti
CLEMENTE COHEN
Chief Financial Officer, PG Forsta
TERESA KIM
Chief Financial Officer, Duck Creek Technologies
DAVID MANN
Chief Financial Officer, SponsorUnited
SIMONE NARDI
Chief Financial Officer, G-P

2:30 PM – 3:30 PM
TRACK 1: STRUCTURAL | GRAND BALLROOM
GenAI in Finance
M **BELKIS VASQUEZ-MCCALL**
Partner, McKinsey & Company
OLIVER FOLEY
Chief Financial Officer, TrueCar, Inc.
JAMES HILLIER
Chief Financial Officer, Bitsight
KEVIN RHODES
Executive Vice President & Chief Financial Officer, Extreme Networks, Inc.
ARIEL SOIFFER
Partner, WilmerHale

TRACK 2: SITUATIONAL | SALONS FGH
The Impact and Opportunity of Changing Interest Rates
M **STEVE PETTIGREW**
Global Head of Software Investment Banking, UBS
JEFF BRAY
Chief Financial Officer, Semperis
MARK MCCAFFREY
Chief Financial Officer, GoDaddy
KRISTIAN PEARSON
Chief Financial Officer, Hyperice
ELIZABETH WARD
Chief Financial Officer, MassMutual

3:30 PM – 4:00 PM
GRAND BALLROOM FOYER
Coffee Break

4:00 PM – 4:30 PM
AFTERNOON FIRESIDE CHAT | GRAND BALLROOM
Aramco: The $2 Trillion Energy Company with 91 Years of History
M **FRANCIS O'SULLIVAN**
Managing Director, S2G Ventures & Senior Lecturer, MIT Sloan
ZIAD T. AL-MURSHED MBA '16
Executive Vice President and Chief Financial Officer, Saudi Aramco

4:30 PM – 6:15 PM
GRAND BALLROOM FOYER
Networking Reception

M MODERATOR

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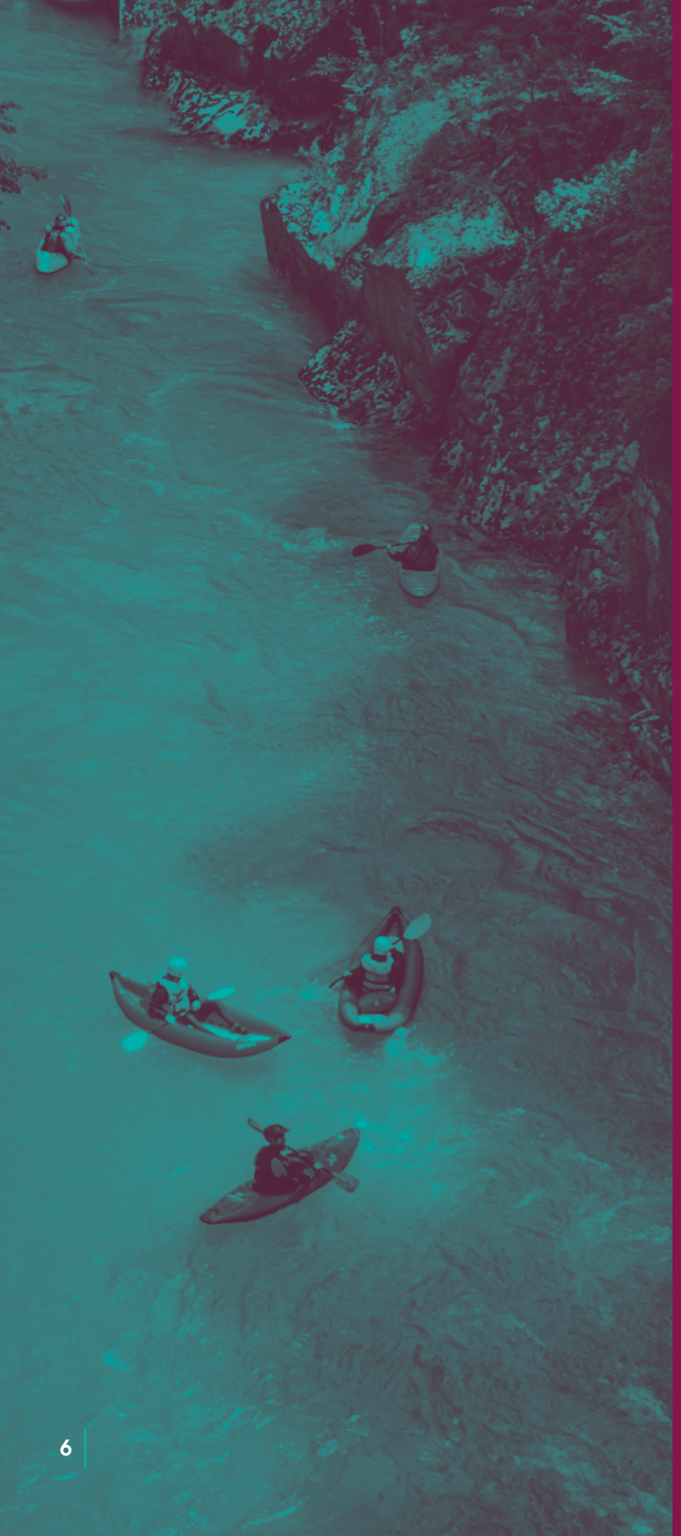
THE 22ND ANNUAL
MIT SLOAN CFO SUMMIT
AGENDA



8:15 AM - 8:30 AM
GRAND BALLROOM

WELCOME

OPENING REMARKS

Jeremy Seidman MBA '03
Executive 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. He 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 Coaching4Change and MIT Sloan. Jeremy, his wife, son, and daughter live in Wellesley, MA and enjoy spending the summers in Narragansett, RI.

WELCOME TO MIT SLOAN CFO SUMMIT

8:30 AM - 9:00 AM
GRAND BALLROOM

HOW TO MEASURE A 'FIT FOR PURPOSE' CULTURE

Culture matters. CFOs know a well-aligned corporate culture has a positive impact on every aspect of corporate health—from employee relations to customer success, financial metrics to market value. But how do you measure culture? Employee surveys were a great first step, offering ranked analyses and word cloud visualization. Today, however, AI has revolutionized our ability to analyze unstructured text and develop 'fit-for-purpose' elements of culture.

Learn how today's financial executives can measure the extent to which an organization lives its core values and identify what drives mission critical outcomes.

MIT MANAGEMENT SLOAN SCHOOL

Donald Sull
Professor of the Practice, MIT Sloan

Donald Sull is a Professor of Practice at the MIT Sloan School of Management, where he directs the Strategic Agility Project and the Culture 500. He teaches courses on competitive strategy and strategy execution. Prior to academia, he worked as a strategy consultant with McKinsey & Company, and as a management-investor with the leveraged buyout firm Clayton, Dubilier & Rice.

The Economist named him "a rising star in a new generation of management gurus" and identified his theory of active inertia as an idea that shaped business management over the past century. Fortune listed him among the ten new management gurus. He has published five books and over 100 cases and articles, including a dozen best-selling *Harvard Business Review* articles.

He is the cofounder of CultureX, which leverages proprietary AI to measure and improve corporate culture. He is the chairman of FilmFish and an advisor to several startups including Betterworks, Tomorrow.io, and eToro. He has advised top teams of more than fifty Fortune Global 500 companies, as well as non-business organizations ranging from the Bill and Melinda Gates Foundation to the Naval Criminal Investigative Service (NCIS). Donald was formerly a Professor at Harvard Business School and London Business School, and earned his Bachelor's, Master's, and Doctorate at Harvard University.

FIRE SIDE CHAT

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

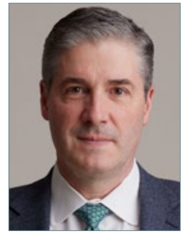
A View into Kenvue: Agility and Experience

Kenvue, formerly a division of Johnson & Johnson, was spun out as an independent company in 2023 and today is the world's largest pure-play consumer health company by revenue. Kenvue's brands include Aveeno, BAND-AID, Listerine, Tylenol and more.

Learn how Kenvue CFO Paul Ruh leads this consumer health business with a north star of "everyday care meets scientific precision" the biggest opportunities and challenges Kenvue faces as an independent company, and the culture of agility he instills to make product, operational, and financial decisions.

He'll be led in conversation by Donald Sull, Professor of the Practice, MIT Sloan School of Management.

Donald Sull
Professor of the Practice, MIT Sloan



Kenvue

Paul Ruh MBA '96
Chief Financial Officer, Kenvue Inc.

Paul Ruh is the Chief Financial Officer for Kenvue. He has more than 30 years of deep experience building global consumer brands and leading diverse teams through times of intense change. In his role as CFO, Paul helps establish and oversee corporate financial planning and reporting, tax, audit, treasury, investor relations and global shared services.

In his previous role as CFO of Johnson & Johnson Consumer Health, Paul helped to steer the Consumer Health business. Over the past five years, Paul, in partnership with the Consumer Health Leadership Team, executed transformational change, putting the business in a position of financial strength. At the helm of finance operations, Paul delivered significant Operating Margin improvement and produced the highest growth the business has seen in a decade, despite the challenges brought by the COVID-19 pandemic and an increasingly competitive consumer marketplace.

Paul has reshaped global consumer brands throughout his entire career, executing more than ten major acquisitions and strategic divestures in his career. He joined Johnson & Johnson Consumer Health from PepsiCo, where he served as the CFO of the multibillion-dollar Latin America business. During Paul's tenure at PepsiCo, he held several roles in both the Foods and Beverages businesses, including CFO of Latin America, CFO of PBA (Gatorade and Tropicana US) and CFO of PepsiCo Foodservice. Paul's career at PepsiCo began in his homeland of Mexico, in 2000, as Director of Strategy and Planning. Prior to joining PepsiCo, Paul worked at McKinsey & Company in the Mexico City and Santiago de Chile offices as a member of the Corporate Finance Practice. He holds an MBA from the MIT Sloan School of Management and a BS in Engineering from the Universidad Iberoamericana in Mexico City. He also was an exchange student at the Swiss Federal Institute of Technology in Zürich, Switzerland. He speaks five languages.

KEY
NOTE

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

PRACTICAL STRATEGIES FOR **ARCHITECTING SUCCESS**

Join author, catalyst and executive coach Laura Gassner Otting for practical strategies to manage present and future opportunities. What comes after initial success? The next challenge.

Learn how to manage people, power and perspective between your past success and next accomplishment.

LAURA GASSNER OTTING

Laura Gassner Otting

Author, Catalyst and Executive Coach

Laura Gassner Otting inspires people to push past the doubt and indecision that keep great ideas in limbo by helping audiences think bigger and accept greater challenges that reach beyond their current, limited scope of belief. She delivers strategic thinking, well-honed wisdom, and perspective generated by decades of navigating change across the start-up, corporate, nonprofit, political, as well as philanthropic landscapes. Laura dares audiences to find their voice and generate the confidence needed to tackle larger-than-life challenges by helping them to seek new ways of leading, managing, and mentoring others.

Laura's rebellious and entrepreneurial edge has been well-honed over a 25-year career that started when she dropped out of law school to join an unknown southern governor's presidential campaign and ended up as a Presidential Appointee in Bill Clinton's White House, where she helped shape AmeriCorps. She left a leadership role as the youngest Vice President at a nationally respected search firm when she realized that her boss's definition of success didn't align with hers and, instead, founded and ran one of the fastest-growing search firms in the country, partnering with the full gamut of mission-driven executives, from start-up founders to scaling social entrepreneurs to global philanthropists. In 2015, Laura sold that firm to the team who helped her build it, both because she was hungry for the next chapter and because she held an audacious dream of electing our nation's first female president.

Since that time, Laura has appeared regularly on Good Morning America and the TODAY Show, and her writing has been seen in *Harvard Business Review, Forbes, HR Magazine*. She is the *Wall Street Journal* bestselling author of three books, including *Wonderhell: Why Success Doesn't Feel Like It Should... and What to Do About It, Limitless: How to Ignore Everybody, Carve Your Own Path, and Live Your Best Life*, and *Mission-Drive: Moving from Profit to Purpose*. Her books have been translated into five languages.

TRACK 1: **STRUCTURAL**

10:30 AM – 11:30 AM
GRAND BALLROOM

Smart & Savvy FP&A

Financial planning and analysis is the foundation upon which every company's modeling, forecasting and budgeting are determined.

Learn the latest strategies and tactics for utilizing internal data, competitive intelligence and real-world experience to develop optimal capital allocation, near-in projects, upcoming goals and long-term strategy.

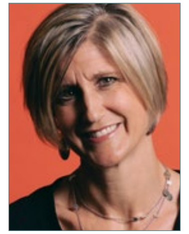
Ryan Kenney

Managing Director, Finance Transformation, KPMG

Ryan Kenney is a Managing Director in KPMG's Finance Transformation consulting practice. He assists CFOs and other senior executives in shaping and implementing their strategic vision, enhancing digital and analytical capabilities, and fostering a more agile and efficient organization.

With over 18 years of experience across diverse sectors such as Industrial Manufacturing, Consumer and Retail, and Healthcare, he has led numerous global, multi-year technology-driven transformations for *Fortune* 500 companies.

Ryan holds a B.S. in Accounting and Information Systems from the University of Massachusetts-Amherst and is a licensed CPA.



Valerie Bauer Gore

Chief Financial Officer, Knack

Valerie Bauer Gore serves as Chief Financial Officer of Knack, a no-code software company. In this role, Valerie oversees finance, operations and people. Over the past 15 years, Valerie has held leadership and finance roles at various B2B SaaS companies with revenues ranging from $9M to $400M. Her finance experience encompasses companies with private equity, venture capital and public ownership.

Valerie is an analytical, metrics-driven leader focused on driving results by supporting data-driven decision making whose earlier roles were in banking and management consulting. Valerie has an MBA from the University of Chicago Booth School of Business and BA in Economics from the University of Michigan

Ludovic Monchal

Chief Financial Officer, Americas, Dassault Systems

Ludovic Monchal is a seasoned finance executive with extensive experience in the software industry. He currently serves as the Chief Financial Officer for the Americas at Dassault Systèmes, a leading global software company specializing in 3D design, engineering, and simulation solutions. In this role, he oversees the company's financial activities across the Americas, including financial planning and analysis, commercial finance, and expense management. His areas of expertise encompass financial planning and analysis, mergers and acquisitions, post-merger integrations, and software distribution models, including cloud and SaaS.

Ludovic served as Chief Financial Officer for multiple companies within the Dassault Systemes group, including more recently Medidata, a company specializing in clinical trial software. He was also in charge of the Corporate FP&A for the Dassault Systemes group and led the transformation of the FP&A function through a 4-year transformation program, which included standardizing on a new Enterprise Performance Management system across all businesses.

He began his career with Deloitte, in Auditing and then M&A Transactions Services, primarily serving multinational companies from the TMT and Aeronautic Sectors for 8 years. He holds a BS in Economics from the Aix-Marseille University, and a MS in Financial Engineering from the Kedge Business School in Marseille.

Doug Orsagh

Vice President of Value Transformation, OneStream

Doug Orsagh is the Vice President of Value Transformation at OneStream. Since coming to OneStream, Doug created and still runs a team that works with prospects and customers to understand the potential benefits delivered by the unique OneStream capabilities based on existing OneStream customers' realized benefits. Prior to OneStream, Doug performed a similar function at Oracle for seven years. He is a recovering CFO with a stint at a global telecom company putting fiber in the ground throughout the US, Canada and the UK. He was also a CFO of a real estate company that performed workouts on the Lehman Brothers portfolio.

He is a CPA from PwC and also holds a Chartered Financial Analyst designation earned while we was at the investment bank Robinson Humphrey in Atlanta, Georgia. Prior to his time in banking Doug worked in the movie business in film production.

He holds both Communications (film) and Economics degrees from the University of Notre Dame and an MBA in Finance from Georgia State University. Doug resides in Atlanta, Georgia with his wife and four children.

Derek Warnick MBA '09

Co-Founder and Chief Financial Officer, Electric Hydrogen Company

Derek Warnick is Chief Financial Officer and co-founder of Electric Hydrogen, a company manufacturing the world's most efficient and low cost electrolyzers to produce green hydrogen at truly global scale. Electric Hydrogen has 380 employees and has raised over $800M to date.

Prior to Electric Hydrogen, Derek spent the last 15 years of his career, since leaving the World Bank, focused exclusively on the intersection of clean energy and finance, including most recently at Break-through Energy Ventures, the cleantech venture capital firm founded by Bill Gates.

Derek received his MBA from the MIT Sloan School of Management (2009) and his BS from Georgetown University.

TRACK 2: **SITUATIONAL**

10:30 AM – 11:30 AM
SALONS FGH

M&A: Strategic, PE and other Opportunities

Mergers and acquisitions are an integral aspect of the business landscape. Whether your company is positioning to be an acquiror or acquiree, or maybe evaluating the impact as those in your sector engage in M&A, it's important to understand the full suite of available opportunities.

McKinsey&Company

Jeff Rudnicki

Senior Partner, McKinsey & Company

Jeff Rudnicki is a Senior Partner in the Boston office. He is a leader in McKinsey's M&A Practice and the global leader of the M&A capability building and performance service line. Jeff has spent 18 years in mergers and acquisitions in a number of roles. His focus is on end-to-end M&A from deal scans, to due diligence, to integrations. He works closely with organizations looking to design and build high-performing M&A capabilities. Jeff also leads SynergyLab, McKinsey's knowledge efforts on best practices in value capture and synergy estimation. Jeff has worked on 80+ acquisitions (before and at McKinsey) including large scale mergers and acquisitions in most industries especially in healthcare and consumer sectors. Jeff holds a MA in economics from John Hopkins University and an MBA with honors from the University of Virginia.

AMOLYT PHARMA

Louis J. Arcudi III

Former Chief Financial Officer, Amolyt Pharma

Louis J. Arcudi III served as Amolyt Pharma's Chief Financial Officer until recently. Louis joined Amolyt from Millendo Therapeutics, where he served as Chief Executive Officer since February 2021, and Chief Financial Officer prior to that. Prior to joining Millendo, he served as Senior Vice President of Operations and Chief Financial Officer at Idera Pharmaceuticals. Before that, Louis served as Vice President of Finance and Administration for Peptimmune, Inc. where he handled all financial business and operations. Before his time at Peptimmune, he served as Senior Director of Finance and Administration at Genzyme Molecular Oncology Corporation, after serving as Director of International Finance and Commercial Operations at Genzyme Corporation. Earlier in his career, he held finance positions with increasing levels of responsibility at Cognex Corporation, Millipore Corporation and General Motors Corporation. Louis obtained his MBA from Bryant College and B.S. in Accounting and Information Systems from the University of Southern New Hampshire.

Shu Jiang

Finance Executive, Private Equity Backed Tech/Service Companies

Shu Jiang is a seasoned finance executive with a strategic and operational focus, boasting experience in leading both publicly traded and private equity backed companies across industries such as technology and healthcare. She has a proven track record of building and leading a top-performing finance & operations team, demonstrating strong business acumen that consistently delivers significant results. She has successfully led and completed 9 M&A transactions (both buy side and sell side) end-to-end (transaction values vary from ~$50 Million to ~$6 Billion per transaction). Additionally, she has overseen multiple financings totaling nearly $2 billion, and has been instrumental in IPO preparation.

Shu has a Master's degree in Business Administration and Management from Boston College, and a Master's degree in Accounting from Bentley University.

Lookout

Mark Nasiff

Chief Operating Officer and Chief Financial Officer, Lookout

Mark Nasiff brings nearly 30 years of finance and operations experience to Lookout, most recently as VP Worldwide Sales Operations and Sales Finance at Brocade. In this role, he was responsible for all aspects of global sales and service operations, sales development, sales and marketing financial planning, and analysis and revenue forecasting in this $2.5B operation. Prior to Brocade, Mark served as the Chief Financial Officer for VeriVue, a content delivery solution company. Before VeriVue, he was Vice President of Sales Finance and later Vice President of Worldwide Sales Processes and Operations at Juniper Networks. He joined Juniper through the acquisition of Unisphere Networks, where he served as Chief Financial Officer and managed the Company's growth from development stage to more than $200M annual revenue over a 2-year period. He's also served as Corporate Controller at Dragon Systems, a provider of advanced speech recognition products and LTX Corporation, a manufacturer of semiconductor test equipment. Mark received his Bachelor of Science in Accountancy from Bentley College in Waltham, MA.

formlabs

Daniel O'Shaughnessy

Chief Financial Officer, Formlabs

Daniel O'Shaughnessy is the Chief Financial Officer of leading 3D printing company Formlabs. He joined Formlabs following his time with SharkNinja as Vice President of Finance, Treasury, Investor Relations and Controller. Prior to joining SharkNinja, Daniel was Vice President of Finance, Investor Relations and Treasurer at The Gymboree Corporation, and M&A diligence manager at PwC. His decade plus of financial executive experience across multiple companies and industries supports the overall strategy and growth of Formlabs.

KEY NOTE

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

LEADING WITH INTENTION

CFOs provide valuable context for evaluating innovations and balancing practical considerations. Join our luncheon keynote for a conversation on embracing new technology, influencing employee success, managing financial health and planning for the future.

WSJ

Walden Siew

Bureau Chief, CFO Journal, *The Wall Street Journal*

Walden Siew is the bureau chief of *The Wall Street Journal*'s CFO Journal.

Walden is a veteran business and finance editor with more than 20 years running major titles and serving global media companies such as Thomson Reuters, Bloomberg and LinkedIn, where he was the company's first finance editor. He's been responsible for hiring, financials, new lines of revenue and product launches.

He is a former Society of American Business Editors and Writers board member, and he holds degrees from Boston University and Northwestern University.

MOODY'S

Noémie Heuland

Chief Financial Officer, Moody's

Noémie Heuland is Chief Financial Officer of Moody's with responsibility for leading the global finance organization, including accounting and controllership, financial planning and analysis, financial systems, investor relations, strategic sourcing and procurement, and tax and treasury.

Before joining Moody's, Noémie was CFO at Dayforce, formerly known as Ceridian, and spent 12 years with SAP in finance leadership roles. Noémie holds an M.S. in Finance and Accounting from Nantes Business School of Management, now known as Audencia, and a degree in international finance from American University. She is a Certified Public Accountant and is fluent in English, French, and Spanish.

ADP

Don McGuire

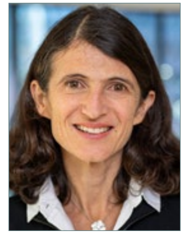
Chief Financial Officer, ADP

Don McGuire is the Chief Financial Officer at ADP. Appointed to the role in 2021, Don serves as the financial leader of the organization, overseeing all global financial operations including accounting and financial reporting.

Don's deep commercial business and financial acumen, as well as his acute understanding of our global markets and client needs, brings a unique lens to his role in helping to shape the strategic growth of the company.

Joining the company in 1998, Don has spent the better part of 20 years leading and growing with ADP, holding a multitude of senior leadership roles in markets around the world. Most recently, as President of Employer Services International (ESI), Don led the company's international regions, overseeing ADP's offerings in 140 countries, driving strategic growth and operational excellence across the portfolio. He was instrumental in the launch of new technologies to streamline and manage multi-country payroll and HR administration.

A Chartered Professional Accountant and a member of CNBC's CFO Council, Don believes that to be a successful leader means learning from those around you and helping others grow. He is driven by purpose and is most motivated by delivering top-notch service to clients.



Nasdaq

Sarah Youngwood

Executive Vice President and Chief Financial Officer, Nasdaq

Sarah Youngwood serves as Executive Vice President and Chief Financial Officer at Nasdaq. With more than 25 years of leadership experience in corporate finance, financial reporting, and investor relations, Sarah leads a global team responsible for Corporate Finance, Treasury, Financial Planning & Analysis, Investor Relations, ESG Reporting, Procurement, Real Estate, Facilities, and Security.

Sarah joined Nasdaq from UBS Group, where she served as Chief Financial Officer and Group Executive Board member. In her role, Sarah led a global team of 3,500 people across Finance, Treasury and M&A, and played a key role in modernizing the bank's infrastructure as well as the acquisition of Credit Suisse.

Prior to UBS, Sarah spent more than two decades at JPMorgan Chase in a number of executive roles, including Chief Financial Officer for the Consumer and Community Banking and Global Technology businesses, Head of Investor Relations, and Managing Director in the Financial Institutions Group.

Sarah holds a combined undergraduate and Master's Degree in Finance and Business from ESCP Business School. Since 2018, she has also served as an Advisory Board Member of Wall Street Women's Alliance.

TRACK 1: **STRUCTURAL**

1:30 PM - 2:30 PM
GRAND BALLROOM

CFO Best Practices

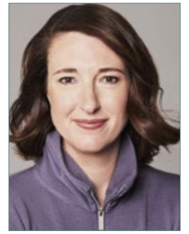
What's the best way to organize your time, communicate with employees, evaluate technology, drive revenue, and manage your career? In this session we'll cover CFO best practices from A to Z including assets and balance sheet management to zero balance emails.

McKinsey&Company

Andy West

Global Co-leader of Strategy & Corporate Finance Practice, McKinsey & Company

Andy West is Global Co-leader of McKinsey's Strategy & Corporate Finance Practice, helping leaders and organizations accelerate sustainable and inclusive growth through strategy development, innovation, portfolio management, effective capital markets engagement and communications, IPOs, M&A, and divestitures. Andy works across sectors, including life sciences, healthcare, high tech, and industrials, partnering with companies to improve their performance. He focuses on helping organizations build capabilities, ensure effective CEO and CFO transitions, drive large-scale transformations, and deliver the full potential of all facets of M&A. Andy holds a BA in political science and economics from Washington University in St. Louis and an MBA from the Kellogg School of Management at Northwestern University.

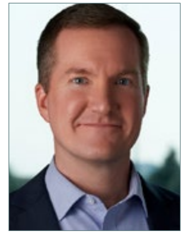


CANADA GOOSE

Beth Clymer

President, Finance, Strategy & Administration, Canada Goose

Beth Clymer is the President of Finance, Strategy, and Administration at Canada Goose, the global performance luxury brand. She's responsible for ensuring the critical functions of finance, human resources, legal, strategy and corporate development support and drive the business, while also providing strategic and operational counsel to the executive team. Before Canada Goose, Beth was the Chief Financial Officer at Jobcase, a social platform for hourly and front-line workers. She previously spent a decade at Bain Capital Private Equity, partnering with many high-growth consumer and retail investments including Burlington Stores, Bob's Discount Furniture, and Canada Goose. Beth holds an MBA from Harvard Business School and a BSE from Princeton University. She and her husband Brian are parents of two spirited daughters and active philanthropists. Beth serves on the board of the Dana Farber Cancer Institute and the Facing History & Ourselves New England Advisory board, and in her free time can be found sculling on the Charles River.



YORK SPACE SYSTEMS

Kevin Messerle MBA '03

Chief Financial Officer, York Space Systems LLC

Kevin Messerle, based in Denver, CO, US, is currently a Chief Financial Officer at York Space Systems, bringing experience from previous roles at Summit Partners, Regiment Capital Advisors LP, Davidson Kempner Capital Management and GE Capital.

Kevin holds a Master of Business Administration at MIT Sloan. With a robust skill set that includes Portfolio Management, Management Consulting, Structured Finance, Management, Leveraged Finance and more, Kevin contributes valuable insights to the industry.

cprime

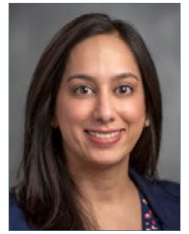
Konstantin Popov

VP, Enterprise Portfolio & Financial Management, Cprime

Konstantin Popov is a senior leader with over two decades of experience driving transformational growth through strategic portfolio and labor financial management. As a Vice President at Cprime, following the acquisition of his company Vincerion in 2023, Konstantin helps organizations align IT spending, allocate resources effectively, and manage enterprise architecture to maximize ROI.

With deep expertise in Finance Transformation & Workforce Management, Technology Portfolio Management, and Profit Optimization, Konstantin partners with clients to develop comprehensive solutions tailored to the unique needs of leaders responsible for financial operations, portfolio strategy, digital initiatives, technology infrastructure, and overall financial performance. His approach enables enhanced financial control, accelerated innovation, and future-readiness for organizations.

Konstantin's success is rooted in his practical experience delivering results for Fortune 500 companies and global industry leaders, combining a consensus-driven management style with acute technical prowess. His client portfolio includes some of the world's largest banks, oil and gas corporations, and cutting-edge pharmaceutical companies, with collective market capitalizations in the hundreds of billions of dollars. By helping organizations navigate the complexities of modern business landscapes, Konstantin empowers them to achieve sustainable growth and competitive advantage in today's rapidly evolving market.



Biofourmis

Renika Sehgal

Chief Financial Officer, Biofourmis

Renika Sehgal is Chief Financial Officer at Biofourmis, a global technology company enabling care delivery. She is a global senior financial executive with over 16+ years of experience in various industries including Healthcare, Infrastructure and Telecom. She has specifically focused on leading businesses and finance teams through strategic transformations and her career reflects a demonstrated track record as an operational finance leader focused on capital allocation, business productivity and strategic M&A opportunities. In addition, she has continuously modernized the finance function by automating processes, implementing global solutions, and leading development programs across early career finance talent.

Renika received a BS in Finance from Babson College.

TRACK 2: **SITUATIONAL**

1:30 PM – 2:30 PM
SALONS FGH

Partnering With Your CTO

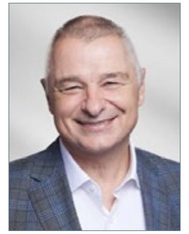
CFOs are on the technology front-line, alongside their Chief Technology Officers, including decisions on resource allocation, how best to fund and manage data security, analytics, cloud-based applications, technology debt and more.

Learn how to partner with your company's CTO for optimal technology outcomes.

Andrea Spinelli
Managing Director, Protiviti

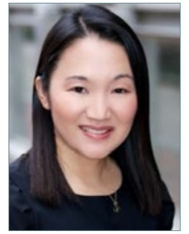
Andrea Spinelli is a Managing Director of Business Performance Improvement in the Boston office of Protiviti, and leads the East Region Managed Business Services (MBS) practice. She has more than 22 years of experience in business performance improvement, specializing in finance optimization solutions 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.



Clemente Cohen
Chief Financial Officer, PG Forsta

As Chief Financial Officer at PG Forsta, Clemente Cohen leads the global financial organization and financial activities, including accounting and controllership, financial planning and analysis, tax, investor relations, internal audit, and treasury. He has over 25 years of international finance and operations management experience for Fortune 500 organizations across Latin America, Europe, and the U.S. Clemente most recently served as Chief Financial Officer at Lionbridge. He previously held leadership positions at Empirix Inc., CA Technologies, Sun Microsystem, and Silicon Graphics Inc.



Teresa Kim
Chief Financial Officer, Duck Creek Technologies

As Chief Financial Officer, Teresa Kim is instrumental in helping to direct Duck Creek's strategic transformation and optimizing our financial operations.

Teresa joined Duck Creek in September 2023 and is an accomplished senior finance leader with a strong background in cloud computing, technology platforms, and "Big Four" public accounting. She joins Duck Creek following a 20-year tenure with Akamai Technologies, a worldwide content delivery network and cloud service company, where she most recently served as vice president of finance in their cloud technology group, overseeing $2B-plus in revenues while helping the business to build a scaling world-class platform. Before that, Teresa held other leadership roles at Akamai and has also served as a senior auditor with Ernst & Young.

She earned her Bachelor of Arts degree with a focus in economics and a minor in Asian American studies from UCLA. She earned her MBA and a master's degree in accounting from Northeastern University.

David Mann
Chief Financial Officer, SponsorUnited

David Mann is Chief Financial Officer at SponsorUnited. He is at the helm of all financial activities, including Controllership, Financial Planning and Analysis (FP&A), Investor Relations, and Treasury. David has an impressive track record spanning more than 20 years in finance leadership roles. He also has demonstrated exceptional skill in guiding software-as-a-service (SaaS) companies through significant revenue growth and operational scaling. Most recently, as CFO at Repsly, a Boston-based growth equity-backed company, he helped drive rapid revenue growth and capital raising efforts, and was instrumental in building a robust financial team and infrastructure. While at Constant Contact, a leading digital marketing and automation platform, Mann played a key role in managing the company through hyper-growth and supported its successful IPO.

David's diverse background also includes finance leadership positions at Tufts Health Plan (now Point-32Health) and Raytheon. He also worked in investment banking at Citibank, research at the Federal Reserve Bank of Boston, and treasury at GTECH (now IGT). He received an MBA from Duke University's Fuqua School of Business.

Simone Nardi
Chief Financial Officer, G-P

Simone Nardi is G-P's chief financial officer. Simone brings 25 years of experience in strategic planning, capital markets, business development, investor relations and change management with companies of various sizes, industries and complexities, both internationally and across the U.S. He has launched and scaled multiple global businesses and divisions in his career and served on several international boards.

At G-P, Simone is an integral member of the executive leadership team, playing a key role in charting the company's future. Responsible for its overall financial health, he works collaboratively with leaders across the organization to drive optimal operating results and create value for its stakeholders.

Prior to joining G-P, Simone was Chief Financial Officer at FuboTV, guiding the firm through a multi-billion-dollar IPO and served as its CFO as a publicly traded company. Simone has also raised over $1 billion in capital through equity and debt financing and held financial leadership positions at Scripps Networks Interactive, NBC Universal and General Electric, where he completed several leadership development programs.

Originally from Italy, Simone earned a bachelor's degree in economics and business administration from Bocconi University in Milan, where he graduated summa cum laude. He also attended the Harvard Business School Program for executive education.

Simone lives in New York City with his wife and their two sons.

TRACK 1: **STRUCTURAL**

2:30 PM – 3:30 PM
GRAND BALLROOM

GenAI in Finance

Artificial intelligence is here to stay. Whether it's helping approve expense reports or providing first-draft management reports, AI has entered the chat and is here to stay. Come learn from those at the forefront of this technological powerhouse.

McKinsey&Company

Belkis Vasquez-McCall

Partner, McKinsey & Company

Belkis Vasquez-McCall is a Partner with McKinsey Digital, based out of the Southern California office. She leads the Firm's Build by McKinsey capabilities in North America and is a global leader in our McKinsey Technology practice. Belkis has more than two decades of experience leading companies through major enterprise-wide transformation programs, including those affecting digital and engineering excellence. She's an experienced technologist and practitioner, with broad experience in product development and new business building, helping businesses transform into digitally-integrated companies that use emerging, cutting-edge technologies to differentiate themselves from their competitors. She served with several top financial, life sciences, healthcare and other institutions globally on technology and digital transformation programs resulting in increased speed, growth and efficiency.

Before McKinsey, Belkis was with the New York Stock Exchange where she led the upgrade of mission-critical enterprise systems. Belkis holds an BA from the New York City School of Technology.

TrueCar

Oliver Foley

Chief Financial Officer, TrueCar, Inc.

Oliver Foley is the Chief Financial Officer at TrueCar, Inc. responsible for financial strategy, accounting operations, tax compliance and investor relations. Oliver has over 10 years of experience in senior corporate finance and strategy roles across several high-growth consumer brands, having joined the company from Flexcar, LLC, a leading vehicle-subscription business in the U.S., where he served as Head of Finance. While there he led the Finance and Accounting, Risk and Analytics teams.

Prior to Flexcar, Oliver was VP of Strategy at Leaf Group Ltd., a publicly traded Internet, media, and ecommerce company where he was responsible for driving profitable growth strategies for its two-sided marketplace business, Society6. Prior to Leaf Group, Oliver was Director of Finance at Ogin, Inc., a private equity backed clean technology company. He began his career in corporate advisory and M&A at Capstone Advisory Group.

Oliver holds an MBA from the Tuck School of Business at Dartmouth and a B.A. from Davidson College.

BITSIGHT

James Hillier

Chief Financial Officer, Bitsight

Jim Hillier is the Chief Financial Officer at BitSight, where he oversees the company's Global Accounting, Financial Planning & Analysis, Order Operations, Procurement, Revenue Operations, and Workplace Services Teams. With over 20 years of experience in the technology sector, Jim has held various finance leadership roles since 2013, following his tenure as an equity research analyst from 2000 to 2013. Before joining BitSight in 2020, Jim led Financial Planning & Analysis and Investor Relations at IPG Photonics, the global leader in fiber laser technology. From 2015 to 2017, he served as Vice President of Investor Relations at Demandware, an industry-leading provider of enterprise cloud commerce solutions, which was acquired by Salesforce for $3 billion in 2016. Between 2013 and 2015, Jim was Vice President of Investor Relations at PTC, a global provider of software for discrete manufacturers used to design, operate, and service complex products. Additionally, Jim was a member of the Board of Directors for NIRI Boston, a non-profit organization of approximately 150 investor relations professionals in the Greater Boston area, serving as President from 2018 to 2019.

Earlier in his career, Jim spent 14 years as a sell-side equity research analyst, including 13 years at UBS, where he was a Director and Senior Analyst. At UBS, he specialized in the global technology industry, working as both a Technology Strategist and a Research Analyst covering the networking and communications equipment sectors. Jim holds a B.A. in Economics and English from the University of Pennsylvania.

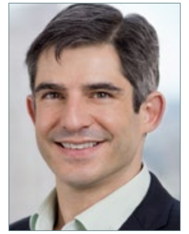
Extreme networks

Kevin Rhodes

Executive Vice President & Chief Financial Officer, Extreme Networks, Inc.

Kevin Rhodes, CPA, serves as Executive Vice President and Chief Financial Officer at Extreme. He is responsible for financial planning and reporting with a focus on developing and implementing key strategies and initiatives that support Extreme's continued growth and expansion.

Kevin joined Extreme in May 2023. Previously, he was EVP and CFO at Duck Creek Technologies, a global vertical SaaS provider, where he played a significant role in leading the company to a successful acquisition by Vista Equity Partners for $19 a share or $2.6B, a 64% premium over the 30-day volume weighted average price (VWAP). Prior to Duck Creek, Kevin held CFO roles at Finvi, Markforged and Brightcove. He holds an MBA from Babson College's FW Olin Graduate School of Business and a B.S., Accounting/Finance from Merrimack College.



WILMERHALE

Ariel Soiffer

Partner, WilmerHale

Ariel Soiffer is a partner in WilmerHale's Boston office, where he focuses on technology transactions and related advice. He was previously a management consultant focused on data analytics and has over twenty years of experience in AI and AI-related fields. He has spoken on AI matters at MIT, the Federal Reserve, Cornell and several venture capital or financial firms.

As a sample of a few recent AI-related engagements, Ariel (1) advised ZebiAI in various research and development and other transactions relating to application of AI to drug discovery; (2) advised a major mutual fund company on use of generative AI together with its offerings; (3) advised a VC investor in investing in a leading GAI unicorn; (4) advised several generative AI startups regarding their respective services in fields including audiovisual content, medical care, and forestry, among others; and (5) advised on a contract for use of AI for fraud detection for a major financial institution.

Ariel is a Chambers-ranked attorney in Technology and a Legal 500 Next Generation Lawyer for Technology Transactions. In addition to his AI work, Ariel's practice includes outsourcing and complex commercial transactions, financial and FinTech transactions, and life sciences transactions, among others. Ariel represents clients in domestic and international transactions.

He studied at the University of Pennsylvania (B.A., *magna cum laude*, Biochemistry and Japanese) and Boston University (J.D., *cum laude*). Ariel won the 2009–2010 ABA Law Students National Negotiation Competition.

TRACK 2: **SITUATIONAL**

2:30 PM - 3:30 PM
SALONS FGH

The Impact and Opportunity of Changing Interest Rates

Capital is the lifeblood of business growth, essential for companies of all sizes and stages, whether private, VC-backed, or public. As a CFO, navigating capital management is crucial.

Join us for a dive into the strategic decisions CFOs face regarding debt vs. equity, managing banking relationships, optimizing balance sheet ratios, and more, all in the most volatile business climate of our lifetimes. Learn from industry leaders and peers about innovative approaches to capital management that can fuel your company's success.

M

Steve Pettigrew

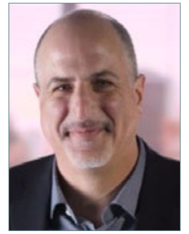
Global Head of Software Investment Banking, UBS

Steve Pettigrew is a Managing Director and Global Head of Software Investment Banking Group at UBS. He has been a software investment banker in San Francisco for the past 20+ years after moving to the Bay Area from Toronto in 2000. Prior to joining UBS, Steve led the software banking teams at Bank of America, Citigroup and Deutsche Bank. He has worked on hundreds of M&A transactions, IPOs and other public financings and has represented a wide range of software clients. Clients have included Bill.com, Blackline, Cloud Software Group, Coupa, Docusign, Guidewire, Omnissa, Palo Alto Networks, Proofpoint, Sailpoint, Salesforce and ServiceNow. Steve received his Bachelor of Science in Engineering from Queen's University in Canada.

Jeff Bray

Chief Financial Officer, Semperis

For the past 10 years, Jeff Bray has led finance teams at cybersecurity vendors in the public and private markets, including Semperis, Rapid7, Imprivata and Invicti Security, helping them grow into scalable software businesses. Jeff has been involved in multiple acquisitions and has managed more than $1 billion in capital markets transactions. Previously, he was an investor in public technology companies for more than 20 years. He serves on the boards of United Way Massachusetts Bay and Old North Illuminated.



Mark McCaffrey

Chief Financial Officer, GoDaddy

As GoDaddy's Chief Financial Officer, Mark McCaffrey is responsible for the company's accounting, finance, financial planning and analysis, tax, treasury procurement, investor relations and global real estate departments. Before joining GoDaddy, Mark spent over 20 years holding various roles at PwC in the Technology, Media and Telecommunications (TMT) sector. Mark most recently was its US TMT Sector Leader, guiding an experienced team of consultants working across clients in the TMT industries.

He also served as the Global Software Industry Leader for the firm, including the global engagement partner on several of PwC's largest multinational software and services clients. Mark has experience as a strategic business advisor, with frequent speaking engagements at industry conferences world-wide and annual workshops for financial executives, operational executives, and board members. He also lectures at colleges and universities on the subject of leadership and frequently blogs on industry and leadership topics.

Mark's career has centered on serving clients in the technology and media industries, particularly on organizations building their digital capabilities. As industries converge, digital innovation has been a hallmark of his work and his clients' success. A graduate of Pace University, Mark was a member of the Board at the Children's Discovery Museum of San Jose through 2017, and is currently the President of the Board of the Kristi Yamaguchi's Always Dream Foundation.

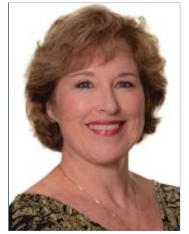
Kristian Pearson

Chief Financial Officer, Hyperice

Kristian Pearson is the Chief Financial Officer and Head of Operations at Hyperice, the global leader in performance and recovery technology. He joined Hyperice in 2020 through the acquisition of NormaTec, where he served as the CFO and Head of Business Development since 2013. Prior to NormaTec, Kristian spent 10 years in institutional trust at BNY Mellon, servicing endowments, 401k's, and retirement funds.

Under Kristian's financial leadership, NormaTec experienced steady and profitable growth, leading to its acquisition by Hyperice in 2000, achieving 30X returns for angel investors – the only round NormaTec ever raised. Since joining Hyperice, Kristian served in a utility capacity for two years before taking over as CFO in August 2022. Since then, Kristian has increased profitability, reduced working capital, and prioritized key investments in innovation and brand development. Kristian has a proven track record of integrating finance and operational functions to optimize production, supply chain, quality assurance, reverse logistics, and go-to-market strategies.

Kristian is a CFA charterholder and holds degrees in Economics and Finance from the University of Pittsburgh, where he graduated *Magna Cum Laude* and served as University of Pittsburgh Rowing Team Captain.



Elizabeth Ward

Chief Financial Officer, MassMutual

Elizabeth (Betsy) Ward is the Chief Financial Officer of MassMutual, a leading mutual life insurance company with $500 billion in assets under management as of December 31, 2023. A member of MassMutual's Executive Leadership Team, Betsy currently leads MassMutual's financial organization including Controllers and Accounting, Financial Planning & Analysis, Corporate Tax, Corporate Actuarial and Business Analytics, Strategy, Corporate Development, and Consumer & Market Insights areas.

Before assuming the role of Chief Financial Officer in 2016, she held the role of Chief Enterprise Risk Officer leading the enterprise risk management and actuarial division across all of the insurance and asset management companies. Prior to joining MassMutual affiliate Babson Capital Management in 2001, Betsy worked in investment portfolio management roles at American Skandia, Charter Oak Capital Management and Aeltus Investment Management, a subsidiary of Aetna Life & Casualty.

She holds a B.A. from the University of Rochester in Economics and Spanish, and is a Fellow of the Society of Actuaries, holds a Professional Risk Manager designation from the Professional Risk Managers' International Association, is a Member of the American Academy of Actuaries, and is National Association of Corporate Directorship certified.

Betsy currently serves on the Federal Advisory Council on Insurance to the Federal Insurance Office of the U.S. Treasury. She is a Non-Executive Director at The Hanover Group, a U.S.-based public property and casualty insurance carrier.

FIRE SIDE CHAT

AFTERNOON
FIRESIDE CHAT

4:00 PM – 4:30 PM
GRAND BALLROOM

ARAMCO:

THE $2 TRILLION ENERGY COMPANY WITH 91 YEARS OF HISTORY

Ziad Al-Murshed, MBA '16, Executive Vice President & Chief Financial Officer, Saudi Aramco, shares the company's approach to exploration, discovery and innovation stemming from Aramco's role as caretakers of Saudi Arabia's vast hydrocarbon resources.

The conversation will be led by Francis (Frank) O'Sullivan, a Managing Director at S2G Ventures where he oversees the firm's energy investing activities. Frank holds a Senior Lecturer position at the MIT Sloan School of Management and engages broadly as a speaker and writer on the topics of clean energy, water, and climate regulatory and policy development.

Francis O'Sullivan

Managing Director, S2G Ventures &
Senior Lecturer, MIT Sloan

Dr. Francis (Frank) O'Sullivan is a Managing Director at S2G Ventures where he oversees the firm's energy investing activities. He is also an adjunct faculty member at the MIT Sloan School, and has previously served as the Director of Research for MIT's Energy Initiative and as Co-Director of the MIT Electric Power System Center. Earlier in his career Frank was a senior consultant at McKinsey & Company.

Frank is a Senior Associate with the Energy and National Security Program at the Center for Strategic and International Studies in Washington DC, a Distinguished Associate at the Energy Futures Initiative and has previously served as a board member of the American Council on Renewable Energy. He is also a member of the Governing Authority of University College Cork.

He received his Ph.D., E.E., and S.M. degrees from MIT and his B.E. from the University College Cork, all in electrical engineering.

Ziad T. Al-Murshed MBA '16

Executive Vice President and Chief Financial Officer,
Saudi Aramco

Ziad T. Al-Murshed has over 27 years of experience in the energy industry and became Executive Vice President and Chief Financial Officer of Saudi Aramco in May 2022. He was appointed Acting Service Line Head for Finance, Strategy & Development in July 2021. Previously, he had served as the Vice President of Fuels & Lubricants, the Vice President of International Operations, and the Vice President of Downstream Growth & Integration. Prior to that, Ziad served as the Executive Director of New Business Development and the General Manager and Head of Transaction Development, responsible for executing joint ventures, mergers, acquisitions, and divestitures, as well as third-party and other transactions.

He joined the company in 1991 and started his career as a producing engineer in the Exploration and Producing business line; currently named Upstream. He then moved to Downstream in 1998 and assumed several responsibilities covering refining, marketing, and joint venture development and coordination.

From 2005 to 2008, he worked at Ras Tanura Refinery, where he was Superintendent of Operations. In 2008, Ziad moved to Corporate Planning, where he was responsible for the company's long-range business plan. From 2010 to 2012, he served as Manager of Yanbu' NGL Fractionation Plant. In 2012, he was appointed Manager of Business Analysis in Corporate Planning, later becoming the Director of Economic & Energy Analysis. From 2013 to 2015, he was the Director of Strategic Planning for the Group.

Ziad holds a B.S. degree in Chemical Engineering from Arizona State University, and an MBA from MIT Sloan. He is also a graduate of the General Management Program at Harvard Business School.

CIO SYMPOSIUM

Global CIOs are invited to join the 22nd MIT Sloan CIO Symposium at the Royal Sonesta Hotel in Cambridge, MA. This annual event provides an unparalleled opportunity for learning, networking, and engaging in insightful discussions on the future of technology, best practices, and business innovation. Featuring presentations, expert panels, and a closing reception, the Symposium fosters a unique environment for professional growth.

New for 2025, the online community will be divided into three tiers, including the exclusive Innovator tier, which offers paid access to premium content and discounts. Innovator members will receive special perks such as discounted tickets to the Symposium, early access to pre-event tickets, and monthly online events. This initiative aims to extend the MIT Sloan CIO Symposium's impactful conversations year-round.

Additionally, the VIP pre-event will be held on May 19, featuring a full afternoon of networking opportunities. The agenda includes lunch, an inspirational talk, roundtable discussions, a formal debate, the Innovation Showcase reception, and the CIO Leadership Award dinner.

FOR MORE INFORMATION

Contact the Organizing Team at info@mitcio.com.

MAY 20, 2025

ROYAL SONESTA HOTEL,
CAMBRIDGE, MA

SCENES FROM 2023

SAVE THE DATE
SAVE THE DATE

SAVE THE DATE

THE 23RD ANNUAL
MIT SLOAN CFO SUMMIT

NOVEMBER 20, 2025

PROGRAM DESIGN
Monderer Design
www.monderer.com

MIT SLOAN BOSTON ALUMNI ASSOCIATION
admin@mitsloanboston.com