



# CFO LEADERSHIP CONFERENCE 2018

---

MAY 9-10, 2018  
BOSTON NEWTON MARRIOTT

# WELCOME

Good morning,

**Welcome to 2018 CFO Leadership Conference! We're thrilled to have you here and look forward to spending the day with you.**

When you're well-equipped with strong leadership skills, you become a catalyst for growth, both for your company and your career.

However, we know that strong leadership skills don't just appear out of thin air – they are the result of endless cultivation, learning, and experience.

During the next two days, you will experience through a practical and compelling framework how to refine the CFO leadership skill set. From leading with ethics and integrity to being resilient, building an extraordinary team of leaders, leading through crisis and more, our two-day event strives to deliver tangible takeaways to enhance your leadership skills and drive your company and career forward.

We'd like to take this opportunity to thank our fantastic sponsors, including Abacus, Aon, The Association of International Certified Professional Accountants, Capital One, Carlson Management Consulting, Comdata, Consero, Floqast, Littler Mendelson, Mineral Tree, Moody, Famiglietti & Andronico, LLP, Robert Half, and Sage Intacct.

Finally, please join us at the end of the day for our annual social and fundraiser, this year to support Make A Wish Massachusetts and Rhode Island. This amazing organizations' mission: to grant the wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy.

We can't think of any people worthier of our support and are humbled by their presence today. Our goal is to raise at least \$20,000, which is enough to grant one amazing wish for a local child in need. We're accepting donations onsite today – just visit the Make-A-Wish table in our sponsor area to make a donation or get more information!

Remember we are never as good as we are when we come together to bring joy and hope to families in need.

Finally, be sure to join in the conversation today online by following us on Twitter (@CFOLeader) or by following #CFOLead.

Thank you for giving us your time today – we hope you enjoy it!

**Regards,**

Becky Blackler, President | Jack McCullough, Founder

**The CFO Leadership Council wishes to thank the following sponsors for their generous support**

## Premier Sponsors



## Advanced Leadership Boot Camp Sponsors



## Meal Sponsors



## Cocktail Reception Sponsor



# AGENDA

## DAY 1 - ADVANCED LEADERSHIP BOOT CAMP

WEDNESDAY, MAY 9

- 12:30pm - 1:00pm:** Registration and Networking
- 1:00pm - 2:30pm:** CFO Leadership In Good Times And Bad  
*Sponsored by Consero Global*
- 2:30pm - 3:00pm:** Break
- 3:00pm - 4:30pm:** Leading The Finance Team To Lead The Organization  
*Sponsored by Abacus Labs*
- 4:30pm - 6:00pm:** Cocktail Reception  
*Sponsored by MFA*

## DAY 2 - FULL DAY CONFERENCE

THURSDAY, MAY 10

- 7:30am - 8:00am:** Registration and Networking  
*Breakfast Sponsored by Mineral Tree*
- 8:00am - 8:10am:** Conference Welcome
- 8:10am - 9:10am:** Morning Keynote: Defining Your Leadership Style
- 9:10am - 9:30am:** Break
- 9:30am - 9:40am:** Radical CFO

- 9:40am - 10:30am:** Demonstrating Resilience and Adaptability in Changing Times
- 10:30am - 10:40am:** Radical CFO
- 10:40am - 11:30am:** Ethics & Integrity in Leadership
- 11:30am - 12:00pm:** Break
- 12:00pm - 12:15pm:** Make-A-Wish Guest Speaker
- 12:15pm - 1:00pm:** Networking Luncheon  
*Sponsored by Littler Mendelson*
- 1:00pm - 1:10pm:** Radical CFO
- 1:10pm - 2:00pm:** Building Great Leaders
- 2:00pm - 2:15pm:** Break
- 2:15pm - 2:25pm:** Radical CFO
- 2:25pm - 3:15pm:** Leading Through Crisis
- 3:15pm - 3:25pm:** Radical CFO
- 3:25pm - 4:15pm:** Servant Leadership
- 4:15pm - 6:00pm:** Thank You Comments and Social To Benefit Make-A-Wish  
*Sponsored by AON*

# PROGRAM: DAY 1

## 12:30pm - 1:00pm Registration and Networking

### 1:00pm - 2:30pm CFO Leadership In Good Times And Bad *Sponsored by Consero Global*

How do you lead under crisis or amidst hyper growth? Can you keep your team from running wild, and yet still run fast? In this hands-on workshop, the Consero Global experts will share leadership principles and help you apply them immediately to practical situations. Take a closer look at real-life examples of both the successes and failures. Discover techniques to ensure survival and ultimate recovery of the enterprise, especially when everyone is panicking around you. This workshop will be the perfect combination of presentations and group discussions.



**Mike Dansby**  
VP of CFO Services  
Consero Global



**Eric Sockol**  
Managing Director  
Consero Global

#### **Mike Dansby, VP of CFO Services, Consero Global**

With more than 32 years of combined management and consulting experience, Mike has successfully raised over \$100M in debt and equity capital, conducted successful M&A transactions, and served as CFO at several tech companies. He is a CPA and earned his MBA from the Wharton School of Business.

#### **Eric Sockol, Managing Director, Consero Global**

Eric brings over 25 years of executive leadership managing dynamic growth at both entrepreneurial startups and highly profitable public companies. Eric has extensive experience raising capital, including three public offerings, ten private placements and numerous bank financings. Eric's career spans comprehensive involvement in finance, corporate governance, M&A, human resources, corporate strategy and operations on a global basis. Prior to joining Consero Global, Eric held the position of CFO at six technology companies. He holds a BBA from the University of Massachusetts, Amherst and is a CPA.

## 2:30pm - 3:00pm Break

### 3:00pm - 4:30pm Leading The Finance Team To Lead The Organization *Sponsored by Abacus Labs*

Finance leaders are increasingly evolving from operational stewards into change agents within their organizations. In this session, Abacus will present a tactical action plan based on The Five Dysfunctions of A Team that can help finance leaders build a culture of accountability and trust in their own teams and among their peers in leadership.



**Omar Qari**  
Co-Founder & CEO  
Abacus Labs, Inc.

#### **Omar Qari, Co-Founder & CEO, Abacus Labs, Inc.**

Omar Qari specializes in financial technologies, mobile, and big data. Previously, he was at Wharton Venture Partners and Abraaj Capital, where he focused on the post-acquisition restructuring of a regional airline and executing early and late stage investment opportunities. He held Board Observer positions at a regional payments business and at a domestic investment bank. He is an MBA candidate at The Wharton School, holds a BS in Computer Science and Minors in International Business from Wake Forest University.

## 4:30pm - 6:00pm Cocktail Reception *Sponsored by MFA*



Performance by **John Duke Logan**  
TEDx & Forbes Summit Speaker  
"Team Magician For New England Patriots"

## PROGRAM: DAY 2

**7:30am - 8:00am**    **Registration and Networking**  
*Breakfast Sponsored by Mineral Tree*

**8:00am - 8:10am**    **Conference Welcome**

**8:10am - 9:10am**    **Morning Keynote: Defining Your Leadership Style**

The relationship between a CEO and CFO is one that defines success for an organization. But how can a CFO actively lead the development of this dynamic relationship? Join our morning keynote speakers, Laura Sen, former Non-Executive Chairman, CEO & President, BJ's Wholesale Club, and Ash Noah, CPA, CGMA, VP of CGMA External Relations, Association of International Certified Professional Accountants, as they discuss the key leadership attributes that CEOs need from their CFOs, as well as how this dynamic team can be a positive and grounded influence on the business.



**Laura Sen**

*former* Non-Executive Chairman,  
CEO & President  
BJ's Wholesale Club, Inc.



**Ash Noah, CPA, CGMA**

VP of CGMA External Relations  
Association of International  
Certified Professional Accountants  
*Moderator*

**Laura Sen, *former* Non-Executive Chairman, CEO & President, BJ's Wholesale Club, Inc.**

Laura began her career with BJ's in 1989, and served in a number of positions until 1997, when she became Executive VP of Merchandising and Logistics. Ms. Sen left BJ's for a three-year period to be Principal of Sen Retail Consulting. In 2008, after her return, she became President, COO and a member of BJ's Board of Directors. In 2009, Ms. Sen assumed the additional role of CEO of BJ's. She is a Director of the Massachusetts Port Authority, and is a former Director of the Federal Reserve Bank of Boston, EMC, Rue21, Abington Savings Bank and the National Retail Federation. Ms. Sen serves on the Board of Directors of the following non-profit organizations: The Boston Ballet; The Dana Farber Cancer Institute; and The Pine Street Inn. She joined the MassMutual Board in October of 2012, and presently serves as a member of the Audit and Human Resources Committees.

**Ash Noah, CPA, CGMA, VP of CGMA External Relations  
Association of International Certified Professional Accountants**

In his role, Ash Noah focuses on introducing, promoting and widening awareness of the Chartered Global Management Accountant® (CGMA) designation among organizations worldwide. He works closely with CFOs and Finance Leaders globally, identifying the trends impacting the finance profession and enabling the Association to proactively respond to equip its members and professionals with the required skills and competencies. Ash has previously served as CFO of the International Unit of the global transport and logistics provider, TNT Express, and has led business transformation through finance teams in Australia, Americas, Asia, Australia Pacific, Europe and the Middle East. Ash is a Chartered Global Management Accountant (CGMA), licensed US CPA, member of the American Institute of CPA's (AICPA) and a Fellow of the Chartered Institute of Management Accountants (CIMA).

**9:10am - 9:30am**    **Break**

**9:30am - 9:40am**    **Radical CFO**



**Blake Oliver**

Senior Product Marketing Manager  
FloQast

**Blake Oliver, Senior Product Marketing Manager, FloQast**

Blake Oliver is an entrepreneur, accountant, writer, and speaker who specializes in cloud accounting technology. In 2016 & 2017, Blake was named a "40 Under 40" by CPA Practice Advisor. He is the Editor of Cloud Accounting Weekly, an online publication for controllers and accountants. In 2012, Blake founded Cloudsourced Accounting. He holds a Bachelor of Music from Northwestern University and an Accounting Certificate from UCLA. He lives in LA with his wife, son, and Jack Russell terrier.

## PROGRAM: DAY 2 *continued*

### 9:40am – 10:30am **Demonstrating Resilience and Adaptability in Changing Times**

The Reebok leadership team will take us on a journey through Reebok headquarters' recent move to Boston's Seaport area amidst extremely tight budget & timeline constraints. They will give personal accounts of executing their "Muscle Up" Financial Fitness project, working in tandem to execute this four-year project and already exceeding goals.



**Craig Thornton**

Vice President of Finance,  
Reebok



**John Lynch**

Vice President of Marketing,  
Reebok

#### **Craig Thornton, Vice President of Finance, Reebok**

A 20-year veteran of the Adidas/Reebok company, Craig is responsible for the financial operations and business transformation efforts at Reebok. He received a BS in accounting from Western Oregon University and quickly joined Adidas in Portland. By the time he moved to Boston in 2013 he was leading a significant portion of the finance functions for the US Adidas subsidiary. Craig has been the leading figure driving significant organizational changes and business improvements. He is married to wife Melissa, and two energetic daughters Reese and Cadence.

#### **John Lynch, Vice President of Marketing, Reebok**

John is responsible for Reebok's Global Business and Marketing Planning, Retail Support Licensing and Business Development. John drives the Reebok brand through all global markets. John first joined Reebok in 1999 and has held various positions in Marketing Communications and Sports Marketing. He played a major part in Reebok's rebranding as THE fitness and training brand. Before joining Reebok, John was the Director of Marketing for Polaroid Corporation. John is an active CrossFitter and runner, but loves all fitness and sports. John received his undergraduate degree from University of Massachusetts and earned his MBA from Duke University. He lives in Melrose, MA with his wife Mimi, and their three children.

### 10:30am – 10:40am **Radical CFO**



**Ethan Carlson**

Founder & CEO

Carlson Management Consulting

#### **Ethan Carlson, Founder & CEO, Carlson Management Consulting**

Ethan founded Carlson Management Consulting in 2010. He has extensive budgeting and forecasting experience for companies of all sizes and industries. Prior, he was CFO for Hayes Management Consulting, Divisional CFO for GE Healthcare and Director of FP&A for Picis, Inc. He is a former co-host of the ASK ETHAN podcast on the CFO Thought Leader. He is also an honoree of the Boston Business Journal's 40 Under 40 for 2016.

### 10:40am – 11:30am **Ethics & Integrity in Leadership**

The CFO must be the most ethical person in his or her company. Each company stakeholder – employee, investor, management, customers, suppliers, and the greater community – relies on the CFO for integrity and transparency. As such, it is not surprising that the CFOs are more likely to face ethical dilemmas in the course of executing their responsibilities. Join Jill Brown, Ph.D., Harold S. Geneen Research Professor of Corporate Governance, Bentley University for a lively conversation where we dive into the slippery slope that CFOs face on a daily basis, and practical methods to navigate flawlessly while leading with ethics and integrity in the forefront.



#### **MEMBERSHIP IS OPEN**

Join The CFO Leadership Council  
for our 2018-2019 Season

#### **Learn more:**

Stop by the registration desk  
during the conference  
or visit [www.cfolc.com](http://www.cfolc.com)



**Jill Brown, Ph.D.**

Research Professor of Corporate Governance  
Bentley University

**Jill Brown, Ph.D., Harold S. Geneen Research Professor of Corporate Governance, Bentley University**

Jill's published research focuses on strategic leadership, including areas of corporate social responsibility, corporate governance and ethics. She is co-author of the 10th edition of a widely used textbook on ethics called *Business and Society: Ethics and Stakeholder Management* (Cengage Publishers). She is an editor at the *Journal of Business Ethics*, among other journals, and she is the current Program Chair for the Social Issues in Management division of the Academy of Management. Prior to her career in academe, she was a commercial banker and small business consultant.

**11:30am - 12:00pm Break**

**12:00pm - 12:15pm Make-A-Wish Guest Speaker**



**Andy Phelan**

Board Member  
Make-A-Wish of MA & RI

**Andy Phelan, Board Member, Make-A-Wish of MA & RI; Partner, Morgan, Lewis & Bockius LLP**

Andrew C. Phelan is a Partner at Morgan Lewis and an experienced trial lawyer who represents clients in a broad range of business disputes and criminal matters. For several years he has generously provided legal counsel to Make-A-Wish Massachusetts and Rhode Island. In 2017, he was invited to join and accepted the position as a member of the Make-A-Wish Massachusetts and Rhode Island Board of Directors.

**12:15pm - 1:00pm Networking Luncheon**  
*Sponsored by Littler Mendelson*

**1:00pm - 1:10pm Radical CFO**



**Jim Kirby**

Regional VP of Sales  
Sage Intacct

**Jim Kirby, Regional VP of Sales, Sage Intacct**

Jim is a seasoned sale leader with over 20 years experience building teams that sell to both Fortune 500 and upper Mid-Market enterprises. Over the last 15 years he has been involved with selling business solutions that leverage the emerging SAAS delivery platform. Strengths in business acumen, technology and leadership have enabled Jim to build train and motivate sales teams to achieve targets. Jim's early background as a consultant has given him a unique experience and perspective to design and re-design sales processes and implement structure that enables better visibility and predictability. Jim received his BBA in Management and Operations from the Massachusetts College of Liberal Arts.

**1:10pm - 2:00pm Building Great Leaders**

It takes one to know one!...When building great leaders you need to be one - Listen in and hear from Jason Trevisan CFO of CarGurus on what it takes to build individuals and teams that can consistently perform, execute flawlessly and attain goals while earning the respect of the organization. Recently recognized as one of the best companies to work for by The Boston Business Journal, learn the key leadership principles and key attributes of the culture used to ensure successful scaling and growth.

**QUESTIONS FOR TODAY'S SPEAKERS?**



Tweet your questions to #CFOLead. Share what you've learned.



**Jason Trevisan**  
CFO  
CarGurus



**Angela Tise**  
National Membership Chair  
CFO Leadership Council  
*Moderator*

**Jason Trevisan, CFO, CarGurus**

Prior to CarGurus, Jason was with Polaris Partners for twelve years, serving as a General Partner since 2010. While at Polaris, Jason lead and supported investments and served on the boards of Internet and SaaS companies including Legalzoom, Shoedazzle, Life Line Screening, PartsSource and Art.com among others. Prior to Polaris, he held various management roles in Analytics and Client Services at aQuantive (acquired by Microsoft). Earlier in his career he was a consultant with Bain & Company. Trevisan received his MBA with Distinction from The Tuck School at Dartmouth graduating as an Edward Tuck Scholar and a BA with honors from Duke University.

**Angela Tise, National Membership Chair, CFO Leadership Council**

As a leader in the marketing efforts of our northeast region, Angela is an experienced manager who strives to improve and insure overall membership quality. In addition, on a national level, she is CFOLC's National Membership Chair. Angela began her career at Unilever Cosmetics Corporation as a Global Marketing Liaison, where she was responsible for the sales aids and advertising of more than 35 brands. She was also the Director of Marketing and Business Development for Panasonic and, most recently, Manager of Membership Services for FEI. Angela received a BA in English and a Master of Arts degree in Education at Montclair State University.

**Let's Grant A Wish!**

This Year's Charity of Choice:



**DONATE NOW:** <https://bit.ly/2Clxwbn>  
or visit Make-A-Wish today in the exhibit area

**2:00pm - 2:15pm**

**Break**

**2:15pm - 2:25pm**

**Radical CFO**



**John Budischak**  
VP of Strategic Sales  
Comdata

**John Budischak, VP of Strategic Sales, Comdata**

John Budischak leads a team of sales directors responsible for building Comdata's virtual credit card (ePayables), purchasing card, T&E card, and payroll card programs in the Mid Atlantic Region. As part of one of the largest B2B payments companies in the world, Comdata partners with more than 500,000 client accounts to manage 1.9 billion transactions each year. Prior, John was the Director of Global Business Development at American Express. He earned his BA from University of Delaware.

**2:25pm - 3:15pm**

**Leading Through Crisis**

Based on 15 years of research on leaders in the midst of major crises—from the Deepwater Horizon Spill, super storm Sandy, to The Boston Marathon bombings — Eric McNulty, Associate Director, Harvard University's National Leadership Preparedness Institute, will present five common mistakes that befall leaders, as well as how to overcome them.



**Eric McNulty**  
Director of Research & Professional Programs  
Harvard's National Leadership Preparedness Institute

## PROGRAM: DAY 2 *continued*

### **Eric McNulty, Director of Research & Professional Programs Harvard's National Preparedness Leadership Institute**

Eric's work centers on leadership in high-stakes, high-stress situations. McNulty is the principal author of the NPLI's case studies on leadership decision making in the Boston Marathon bombing response, innovation in the response Hurricane Sandy and the professional/political interface in the Deepwater Horizon response. McNulty co-founded Harvard Business Publishing's conference business and served as its director for six years. He also developed custom programs in collaboration with leading companies such as Accenture, Coca-Cola, SAS, UPS, Visa, and others.

McNulty holds a BA in Economics (with honors) from the UMASS Amherst and a Master of Arts in Leadership from Lesley University.

### **3:15pm - 3:25pm Radical CFO**



**Marietta Defini**

VP, Commercial Payments Business Development  
Capital One

### **Marietta Defini, VP, Commercial Payments Business Development, Capital One**

Marietta has spent the last decade consulting with finance leaders on how to access and manage cash in an ever-changing digital world. Her wealth of experience and knowledge help companies attract and retain millennial talent as well as optimize working capital. At Capital One, she focuses on bringing technology and personalization to midmarket companies and dedicates herself to the mantra of 'Changing Banking for Good.' She has her BA from the University of Georgia. Marietta co-chairs a Somerville woman's skill share and champions a Boston-based feminist book club. She lives in Boston with her husband Jim and young son Jacob.

### **3:25pm - 4:15pm Servant Leadership**

Business success depends on customer loyalty, which depends on high levels of customer satisfaction, which depend on high levels of employee performance, which in turn depends on high levels of employee engagement. And what does high employee engagement depend on? Servant leadership. Join Joe Patrnczak, Principal, Green Summit Partners, LLC, as he discusses how servant leaders put the enterprise and the people first in everything they do, and how that, in turn, brings success to the business.



**Joe Patrnczak**

Principal  
Green Summit Partners, LLC

### **Joe Patrnczak, Principal, Green Summit Partners, LLC**

Joe Patrnczak is head of Green Summit Partners, a consulting practice dedicated to helping organizations bring out the best in their people. Prior to establishing Green Summit, Joe served as Chief Human Resources Officer at Cleveland Clinic, tasked with making the Clinic a great place to work and grow, building a highly engaged workforce, and modernizing the HR function. Previously, Joe served as Vice President of Human Resources for HP/Compaq/Digital, including leading HR for the \$4.5B Global Customer Services Division, which was cited for five years by IDC, Gartner, and Forrester as the technology industry's #1 or #2 service business. Joe holds an MS in Human Resources Management and Organizational Development from American University; he is also a graduate of the Advanced Executive Program at Northwestern University's Kellogg School, and the International Management Program at INSEAD, Fontainebleau France. He holds a BA in Sociology from Northwestern, where he (along with his twin brother Carl) was defensive co-captain of the football team and a member of the All Big Ten Academic Team. Joe divides his time between his Boston home and Vermont log cabin. He is an avid skier, tennis player, and fly fisherman.

### **4:15pm - 6:00pm: Thank You Comments and Social To Benefit Make-A-Wish**

*Sponsored by AON*

#### **QUESTIONS FOR TODAY'S SPEAKERS?**



Tweet your questions to #CFOLead. Share what you've learned.

## CFO SOCIAL FOR A CAUSE



Make-A-Wish® Massachusetts and Rhode Island grants wishes for children with life-threatening medical conditions to enrich the human experience with hope, strength, and joy. According to information from the Centers for Disease Control and Prevention, approximately 500 children in Massachusetts and Rhode Island are newly diagnosed with life-threatening medical conditions each year. Our vision is to grant wishes for every medically eligible child annually.

Make-A-Wish® Massachusetts and Rhode Island began its joy-filled journey in 1987 when a little girl named Colleen, who had Niemann-Pick disease, made a simple wish for a family trip to York Beach in Maine. Since granting this first wish, our organization has made dreams come true for over 7,000 children in Massachusetts and Rhode Island.

### HOW ARE WE GOING TO HELP?

This year, The CFO Leadership Council has chosen Make-A-Wish Massachusetts and Rhode Island as our group to support. We're accepting donations in any amount today at our Make-A-Wish table in our sponsor area.

Our goal - to raise \$20,000 or more to grant two amazing, life changing wishes for families who need it the most.

We are never as good as we are when we come together like this to bring joy and hope to families in need.

Thank you for your support!

### Let's Grant A Wish!

This Year's Charity of Choice:



**DONATE NOW:** <https://bit.ly/2Clxwbn>  
or visit Make-A-Wish today in the exhibit area

## ABOUT THE CFO LEADERSHIP COUNCIL

### WHO WE ARE

The CFO Leadership Council is a professional association whose mission is to empower senior financial executives realize success in their careers, as well as for the people and companies they lead.

Our members realize this success through the collaborative and energetic community we foster, which helps them build a professional network of their peers, as well as involves them in engaging discussions, both in-person and online, that deliver pragmatic and tangible insights on business and leadership issues.

### OUR VISION

Founded in 2006, the CFO Leadership Council started as an informal gathering of finance executives interested in building lasting connections with their peers in a comfortable, open setting.

Our vision is to remain the premiere CFO organization in the United States, with live, professional development programs and online resources that are focused on relevant issues and emphasize leadership development.

### CHAPTER LOCATIONS

Atlanta, GA	Houston, TX	San Diego, CA
Austin, TX	Jacksonville, FL	San Francisco, CA
Boston, MA	Los Angeles, CA	Seattle, WA
Charlotte, NC	Minneapolis-St. Paul, MN	Silicon Valley, CA
Chicago, IL	Short Hills, NJ	South Florida, FL
Dallas, TX	New York, NY	Washington, DC
Denver, CO	Orange County, CA	
Detroit, MI	Philadelphia, PA	

### INTERNATIONAL LOCATION

Toronto, Canada

For more information, visit [www.cfolc.com](http://www.cfolc.com).



[www.cfolc.com](http://www.cfolc.com) | [@CFOLeader](https://twitter.com/CFOLeader)