



Driving Efficiency & Innovation

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Chicago, IL
June 18 – 19, 2020

EARN UP TO 12 CPE CREDITS

UPDATED MARCH 16

SPEAKER FACULTY

As well as 50 additional speakers soon to come!

- **Stephanie Kelton**, Former Chief Economist, **U.S. Senate Budget Committee**, Leading Expert on **Modern Monetary Theory** & Professor of Economics and Public Policy, **Stony Brook University**
- **Vince Ryan**, Editor-in-Chief, **CFO Magazine**
- **Russ Banham**, Pulitzer-Nominated Financial Journalist & Best-Selling Author, **Russ Banham Inc.**
- **Ryan Grimsland**, Vice President of Finance, U.S. Stores, **Lowe's**
- **Austin Jones**, Director, Finance and Treasury, **Caesars Entertainment Corporation**
- **Steven Cieslak**, Chief Financial Officer, **Nordex**
- **Suk Shah**, MBA, Chief Financial Officer, **Guaranteed Rate**
- **Tom De Weerd**, Chief Financial Officer & Executive Vice President, **Mauser Packaging**
- **Mark Noffke**, CPA, Chief Financial Officer & Executive Vice President, **Flying Foods**
- **Nayab Yusuf Saddiqi**, FCA, CFE, CISA Vice President of Finance, **VISA**
- **Kevin Mpambou Do Dang**, Chief Financial Officer, **Away From Home, Kellogg Company**
- **Lee Coulter**, Chief Executive Officer, **Transform AI** & Chair, **IEEE**
- **Mirek Purpura**, Head of Finance – Central Europe & Israel, **Baxter International**
- **Chris Ortega**, Director of Finance, Americas, **Emarsys**
- **Denise Chamberlain**, Executive Vice President & Chief Financial Officer, **Edward-Elmhurst Health**
- **Jamie Singer**, Senior Vice President Crisis & Risk Management, **Edelman**
- **Matt Poleski**, Regional Chief Financial Officer, **Arthur J. Gallagher**
- **Tiffany Harper**, First Deputy Treasurer & Chief of Staff, **City of Chicago**
- **Ashley Koch**, Chief Financial Officer, **Steward Medical Group**
- **John Lausas**, Vice President of Finance & Corporate Controller, **Chamberlain Group (CGI)**
- **Steven A. Bourne**, CPA, Chief Financial Officer, Secretary & Treasurer, **Clarus Therapeutics**
- **Deanna Strable**, Executive Vice President & Chief Financial Officer, **Principal Financial Group**
- **Jill Skordinski**, Corporate Controller, **Corelle Brands**
- **Brenna Albert**, CPA, Senior Vice President & Controller - Accounting, Treasury & Tax, **Cresco Labs**
- **Ozan Kaya**, Chief Financial Officer & Chief Operating Officer, **ShopRunner**
- **Jonathan Johnson**, Chief Financial Officer, **Chicago Department of Aviation (CDA)**
- **Larry Hai Lu**, Director Global Technical Accounting, **Walgreens Boots Alliance**
- **Rishi Potdar**, Chief Financial Officer, **K4 Mobility**
- **Ivan Ouzounov**, CMA, Director of Financial Planning & Analysis, **PSAV**

- **Lyndsey Zhang, MBA**, Chief Financial Officer, **MiaSole**
- **Yang Xu**, Vice President & Global Treasurer, **The Kraft Heinz Company**
- **Matt Galvanoni**, Vice President of Finance – North America, **Ingredion Incorporated**
- **Joe Richmond**, Vice President of Finance, Behavioral Health, **Kindred Healthcare**
- **Bill Mines**, Senior Vice President, Finance & Strategy, Supply Chain & Logistics, **Walmart**
- **Rahul Handa**, Head of Commercial, Vice President, Finance, Strategy & Market Development, **Inframark**
- **Michael C. Mroz**, Treasurer, **BP America Inc.**

CONFERENCE DAY ONE

Thursday, June 18, 2020

7:30am – 8:30am

Networking Breakfast*

8:30am - 8:45am

Opening Remarks*

8:45am – 9:30am

KEYNOTES ADDRESS: When a Presidential Election & Recession Collide

2020 will be a historic year economically and politically. Various factors are impacting the economic cycle including GDP, interest rates, and consumer spending, all which directly affect your organization. As finance executives, your priority is to appropriately manage spending and increase profitability, while preparing for backlash of the presidential election and a recession.

In this session, topics of discussion will include:

- How the government's deficit spending affects finance
- The ripple effect of expunged student debt
- What the future of healthcare looks like, depending on who is elected

Stephanie Kelton, Former Chief Economist, **U.S. Senate Budget Committee**, Leading Expert on **Modern Monetary Theory & Professor of Economics and Public Policy**, **Stony Brook University**

9:30am – 10:00am

FIRESIDE CHAT: Managing High-Performance Technology Platforms to Grow Business

The necessary implementation of technology platforms helps streamline finance processes and launch your organization into new growth. AI (artificial intelligence) capabilities allow for increased personalization and optimization of finance operations.

In this session, topics of discussion will include:

- How to integrate technology platforms within the finance function
- The importance of personalization
- Understand how to grow your organization through technology

Hosted by: **TripActions**

10:00am – 10:45am

Morning Networking Break & Expo Round Robin Challenge

10:45am – 11:15am

10:45am – 11:15am

10:45am – 11:15am

TRACK 1: STRATEGY & LEADERSHIP	TRACK 2: FP&A	WORKSHOP
The Changing Landscape in Audit & Control: Intelligent Automation and the World of 100% Sample Auditing	PANEL DISCUSSION: Skill-Set Evolution in FP&A* FP&A teams play a crucial role in achieving budgeting, forecasting, and analysis goals. As FP&A teams evolve, the	Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four

<p>Intelligent automation technology has created a new reality for risk management, audit, and control. Welcome to the end of control sampling and say hello to 100%. The new reality is that audit firms are no longer asking for a few samples to test your controls. They simply want access to everything: the whole ledger, and every single journal entry.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Utilizing modern tools to identify trends, risks, and outliers that were never possible Using intelligent automation in your operation to eliminate control risks Ensuring you are ready when your external auditor simply wants everything <p>Lee Coulter, <i>Chief Executive Officer, Transform AI & Chair, IEEE</i></p>	<p>competencies members need also change. Critical thinking, communication, and collaboration, among other skills, gain in importance.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> How the FP&A role is morphing as it gains prominence Obtaining better data and increasing efficiency as the teams grow Staying on track with delivering meaningful and strategic value 	<p>workshops over two days, these events within an event allow your organization to present its content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>
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11:20am – 11:50am	11:20am – 11:50am	11:20am – 11:50am
<p>TRACK 1: STRATEGY & LEADERSHIP</p> <p>The CFO's Crucial Role in Digital Transformation*</p> <p>Digital transformation utilizes technology that helps an organization create efficient operations and processes, but what's the role of the CFO and finance? Top priority is to decide which internal funding requests to prioritize. Which funding requests deserve priority? And how much financial investment should they get, both in the short and long term?</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Finance's role in creating and prioritizing a digital agenda Adapting to digital disruption and pivoting to competitive business models Ensuring digital investments launch your organization into new growth and profitability <p>Prevedere</p>	<p>TRACK 2: FP&A</p> <p>Key Principles of FP&A*</p> <p>In recent years, FP&A has emerged as a crucial function within finance. There is an increased need for an organization to obtain real-time data insights regarding products and services. Developing a strategic long-range plan, identifying resources to implement projects, and understanding how operational plans will drive financial results, are a few key principles that benefit FP&A.</p> <p>This session will explore:</p> <ul style="list-style-type: none"> Identifying specific targets and hold teams accountable for results Establishing KPIs that drive business success Monitoring the results of KPIs and the link to financial incentives <p>Ivan Ouzounov, CMA, Director of Financial Planning & Analysis, PSAV</p>	<p>WORKSHOP</p> <p>Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four workshops over two days, these events within an event allow your organization to present its content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>

11:55am – 12:25pm	11:55am – 12:25pm	11:55am – 12:25pm
<p>TRACK 1: STRATEGY & LEADERSHIP</p> <p>PANEL DISCUSSION: The Next Steps in Sustainability*</p> <p>Finance plays a very important role in the promotion and advancement of organization-wide sustainability initiatives and tackling climate change issues that</p>	<p>TRACK 2: FP&A</p> <p>PANEL DISCUSSION: FP&A's Holy Grail - A Highly Predictive Forecast*</p> <p>FP&A, is expected to forecast, plan, and analyze a company's financial and</p>	<p>WORKSHOP</p> <p>Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four workshops over two days, these events within an event allow your organization to present its</p>

<p>could impact the business. In particular, finance has a massive opportunity to trail-blaze new sustainable strategies and capitalize on the multi-level benefits that green finance practices offer. In addition, as the main financial adviser to the CEO, investors, and shareholders, CFOs can create and present strategies that will positively affect their companies' bottom lines, while also making a positive impact on the environment.</p> <p>This session will address:</p> <ul style="list-style-type: none"> Integrate sustainability into the core of existing businesses and new business models Steering the entire organization to focus on the importance of climate change and the drive for cleaner economic growth Moving beyond reporting on energy costs and carbon impact to prioritizing operations that minimize environmental impact <p>Vistra</p>	<p>operating performance for the near future. However, organizations often fall short of being able to predict how much growth and investment products & services will drive in the coming years. This session will cover some of the best practices in forecasting, including the use of rolling forecasts, instead of traditional budget, to allow for real-time responsiveness.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Examining forecast assumptions with a critical eye to improve accuracy How to make better guesses and prepare for the unknown Understanding the politics of financial uncertainty and what adequate predictions entail 	<p>content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>
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12:30pm – 1:00pm

TRACK 1: STRATEGY & LEADERSHIP

Building a Bridge: Engaging Non-Financial Leadership to Attain Financial Success

The CFO does not really control the financial success of the organization. That outcome is determined by the decisions made by everyone in the organization every day. Building a bridge to teach and engage non-financial leaders to understand how the choices they make affect the organization's success is vital.

In this session, topics of discussion will include:

- Where do you start to build the bridge?
- What processes can be used to engage non-financial leaders?
- How can you ensure sustained success?

Denise Chamberlain, Executive Vice President & Chief Financial Officer, **Edward-Elmhurst Health**

12:30pm – 1:00pm

TRACK 2: FP&A

Preventing Cloudy Forecasts: The Priority for FP&A

Companies face uncertain economic times, forcing FP&A executives and CFOs to find ways to improve the accuracy of financial planning and sharpen data-driven insights. Technology tools can help strengthen forecast accuracy and enrich data insights, but the real benefit comes from better process and practices.

In this session, topics of discussion will include:

- Producing a rolling forecast to understand business performance shifts
- Tracking real-time performance against objectives to improve agility
- Using feedback to discover what works and what doesn't

12:30pm – 1:00pm

WORKSHOP

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1:00pm - 2:00pm

Networking Lunch

2:00pm – 2:30pm

TRACK 1: STRATEGY & LEADERSHIP

Aligning Professional Development and Training with Current and Future Business Goals

As the expectations of finance change, there is an increased bias towards talent management and a higher demand for finance business partnering initiatives. Finance executives must stay abreast to new initiatives regarding talent management and development, successful onboarding, and coaching individuals to prepare for the C-suite.

In this session, topics of discussion will include:

- Investing in finance business partnering capabilities
- Developing and managing talent in the finance function
- Mentoring and coaching for the C-suite

Tom De Weerd, *Chief Financial Officer & Executive Vice President, Mauser Packaging*

2:00pm – 2:30pm

TRACK 2: FP&A

Pushing Finance Into the Digital Era*

Today, many companies are solving critical financial and strategic challenges through digital transformation. A key priority in a transformation is gaining the ability to analyze data to make smarter decisions, rather than the historical norm of basing them on gut instinct. However, how does the CFO push the finance organization to reach these heights? And how can a CFO accelerate the finance team's shift from performing low-value, manual work to providing analytics-rich internal financial advice enabled by cutting-edge automation?

In this session, topics of discussion will include:

- Utilizing technologies like robotic process automation and machine learning to make operations and processes more efficient
- Ensuring finance has the right technology and talent to support the business's future needs
- Positioning finance organizationally to be a better business partner

John Lausas, *Vice President of Finance & Corporate Controller, Chamberlain Group (CGI)*

2:00pm – 2:30pm

WORKSHOP

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2:30pm – 3:00pm

TRACK 1: STRATEGY & LEADERSHIP

The Future of Automated Payment Across Borders*

The rise of digital transformation has been steering consumers away from cash and creating a demand for fast, frictionless payments. New technologies and companies are finding ways to bring more streamlined international payment services to businesses of all stripes. With the expansion of these digital payment services, an organization can broaden its business initiatives into new terrain.

In this session, topics of discussion will include:

- Improving accuracy and mobility through the implementation of automated payment services
- Providing business customers with an easy, accessible way to buy goods or services from your organization

2:30pm – 3:00pm

TRACK 2: FP&A

Cyber Risk: Crisis Communications Lessons Learned from the Trenches

As the cyber risk landscape continues to evolve, all organizations must be prepared to respond to potential data security & privacy threats. Failure to communicate effectively and with expediency on these and other important issues can damage business by eroding trust, tarnishing brand reputation and undermining competitiveness. As a result, stakeholders expect organizations to develop, maintain and execute a robust capability to manage and mitigate reputational risk effectively.

2:30pm – 3:00pm

WORKSHOP

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<ul style="list-style-type: none"> Save money on bill pay processing by optimizing automated payment services 	<p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Understanding the evolution of today's risk landscape How to communicate effectively in response to data security & privacy issues, and how to avoid common communication missteps Budgeting for critical solutions to combat attacker's evolving tactics <p>Jamie Singer, Senior Vice President Crisis & Risk Management, Edelman</p>	
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3:00pm – 3:30pm TRACK 1: STRATEGY & LEADERSHIP	3:00pm – 3:30pm TRACK 2: FP&A	3:00pm – 3:30pm WORKSHOP
<p>PANEL DISCUSSION: Achieving the CFO Title</p> <p>Finance executives, especially Treasurers and Controllers, often have the end goal of earning the CFO title within an organization. Navigating internal growth opportunities as well as the job market gives insight into the availability of positions including the desired skill-sets companies are asking for.</p> <p>This session will explore:</p> <ul style="list-style-type: none"> Understanding the competencies needed to be a CFO Strengthening your personal brand What to expect when working with recruiters <p>Panelists: Mark Noffke, CPA, Chief Financial Officer & Executive Vice President, Flying Food Group</p> <p>Steven A. Bourne, CPA, Chief Financial Officer, Secretary & Treasurer, Clarus Therapeutics</p>	<p>Taxes & the Economy: How Taxation Directly Affects Your Organization</p> <p>The 2020 presidential election may unearth insecurities within your organization, especially when evaluating the aftermath of the vote. Tax-free income may be brought to light especially considering the state and local tax (SALT) deduction and changes made with the Tax Cut and Jobs act (TCJA).</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Understanding implications of the 2020 presidential election on business taxation trends How changes pertaining to taxes and healthcare can directly impact your bottom line How potential changes in international taxation may affect operations domestically and abroad <p>Lyndsey Zhang, MBA, Chief Financial Officer, MiaSole</p>	<p>Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four workshops over two days, these events within an event allow your organization to present its content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>

3:30pm – 4:00pm

Afternoon Networking Break*

4:00pm – 4:30pm

PANEL DISCUSSION: 2020 Recession? Planning for the Unexpected*

Although the U.S. economy is fairly stable, the word "recession" is still being uttered by economists and CFOs, and uncertainty and fear of a sustained downturn still dogs business planning. Fortunately, organizations have had ample time to position themselves to withstand uncertain economic times.

In this session, topics of discussion will include:

- Prepare for a gradual or sudden downturn in the global economy
- Position a business for stability as economic growth slows or turns negative
- Identify financial risks and forecast the effects on investment, spending, and capital-raising

Panelists:

Yang Xu, Vice President & Global Treasurer, **The Kraft Heinz Company**

Deanna Strable, Executive Vice President & Chief Financial Officer, **Principal Financial Group**

4:30pm – 5:00pm

Coronavirus Virus Outbreak - Early Lessons

The spread of the coronavirus virus cut quickly into global trade flows and threatened the financial well-being of some companies. Understanding and preparing for epidemics, as well as other Black Swans, requires thoughtful planning. That said, it's absolutely necessary to protect a business from unpredictable, turbulent events.

In this session, topics of discussion will include:

- How to identify an epidemic and its attendant threats
- Putting into action strategic risk assessments for all kinds of catastrophic hazards
- Developing a plan to manage post-event consequences

5:00pm – 6:00pm

Networking Cocktail Reception*

6:00pm

Conference Day One Concludes

CONFERENCE DAY TWO

Friday, June 19, 2020

7:45am – 8:45am

Networking Breakfast*

8:45am – 9:00am

Opening Remarks*

9:00am – 9:30am

PANEL DISCUSSION: Women in Leadership - Cracking the Glass Ceiling*

Hear from leading finance executives on their experience as women in leadership and what barriers they're fighting to overcome to gain a seat at the table

In this session, topics of discussion will include:

- How to face the 'glass cliff' – taking over a CFO job when the probability for failure is high
- How to build a team of advocates and collaborators to ensure success
- Making a concerted effort to promote gender diversity in your organization

Panelists:

Denise Chamberlain, Executive Vice President & Chief Financial Officer, **Edward-Elmhurst Health**

Tiffany Harper, First Deputy Treasurer & Chief of Staff, **City of Chicago**

Yang Xu, Vice President & Global Treasurer, **The Kraft Heinz Company**

Deanna Strable, Executive Vice President & Chief Financial Officer, **Principal Financial Group**

Moderator:

Brenna Albert, CPA, Senior Vice President & Controller - Accounting, Treasury & Tax, **Cresco Labs**

9:30am – 10:00am

Business & the 2020 Presidential Election*

The presidential election four years ago brought massive uncertainty, but this time around may be even more challenging. The polarization of politics could mean a massive swing in business regulations, taxes, and investment depending on what party wins the White House and Congress. How can organizations prepare for different election outcomes?

In this session, topics of discussion will include:

- Strengthening the organization's finances to withstand economic disruptions
- Managing through events that could unsettle financial markets and curb demand for products and services
- Navigating policy changes in an altered business environment post-election

10:00am – 10:45am

Morning Networking Break & Expo Round Robin Challenge Raffle Drive

10:45am – 11:15am

TRACK 1: STRATEGY & LEADERSHIP

The U.S. Cannabis Industry – The Evolving Role of a Finance Team in a Period of Hyper-Growth and Regulatory Uncertainty

Due to hyper-growth and an ever-changing regulatory landscape, the U.S. cannabis industry provides unique challenges to finance professionals entering the space. Consistent with the theme of evolution in today's world of finance, leaders in this industry are required to maintain focus on long-term goals and core values, even when strategies may need to unexpectedly shift due to rapidly developing market factors and regulatory changes. However, broad lessons can be learned about navigating and managing change, building a diverse team with skill-sets needed for success in an evolving industry, and solving unexpected problems on a day-to-day basis.

This session will explore:

- Background of the regulated U.S. cannabis industry and the emergence of public companies in the space
- Navigating change and driving the evolution of a finance organization
- Problem-solving and resourcefulness in the face of a unique set of circumstances or challenges

Brenna Albert, CPA, Senior Vice President & Controller - Accounting, Treasury & Tax, Cresco Labs

10:45am – 11:15am

TRACK 2: FP&A

PANEL DISCUSSION: FP&A Data Strategies - Collecting Accurate Information and Strengthening Predictive Insights*

FP&A executives are tasked with sourcing and collecting accurate information to forecast data-driven insights. However, many organizations do not have a healthy framework for collecting and storing data and preventing user error and data corruption.

In this session, topics of discussion will include:

- Capturing information with less error and more clarity, strengthening forecast accuracy
- Developing best practices for sourcing, protecting, and sourcing data
- Implementing forecast solutions that ensure end-to-end data integrity

10:45am – 11:15am

WORKSHOP

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11:20am – 11:50am

11:20am – 11:50am

11:20am – 11:50am

TRACK 1: STRATEGY & LEADERSHIP	TRACK 2: FP&A	WORKSHOP
<p>PANEL DISCUSSION: The Necessity of Good Governance*</p> <p>The sustainability and societal impact of a company or business is a major determinant for many investors today. How can finance executives shoulder the responsibility to ensure social and environmental viability?</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Ensuring your organization has an ESG framework in place Navigating the three pillars of sustainability: economic, social, and environmental Pursuing sustainable initiatives that produce both environmental and economic benefits 	<p>Why Modern Accounting Processes are Crucial to Financial Planning & Forecasts</p> <p>Trying to expeditiously assemble financial plans and forecasts, FP&A executives struggle with traditional accounting processes that stall their work. Accounting teams present FP&A with an analysis of the financial figures, but it is produced in such a way that FP&A is left to ask multiple questions. This back and forth process is labor intensive and time-consuming.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Finding ways for FP&A teams and accounting to work together Exploring modern accounting processes and systems that make financial data transparent Recognizing the responsibilities of each role to streamline processes <p>Matt Galvanoni, Vice President of Finance – North America, Ingredient Incorporated</p>	<p>Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four workshops over two days, these events within an event allow your organization to present its content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>

11:55am – 12:25pm

11:55am – 12:25pm

11:55am – 12:25pm

TRACK 1: STRATEGY & LEADERSHIP	TRACK 2: FP&A	WORKSHOP
<p>Data Democratization</p> <p>Properly translating data across every department within an organization is critical to preserving confidential information. When everyone has access to data, decision-making is expedited and barriers that limit understanding are eliminated. Data democratization is disruptive with the potential to change long standing business models.</p> <p>This session will address:</p> <ul style="list-style-type: none"> Democratizing your organization through data access Enabling access through machine learning Efficiently deliver insights 	<p>Reevaluating Corporate Performance Management</p> <p>Corporate Performance Management (CPM) systems have become critical tools for monitoring and managing organization's performance, with the most prevalent KPIs covering revenue, ROI, overhead, and operational costs. Implementing the appropriate frameworks will ensure performance management is accurately assessed, giving an organization measurable metrics to enhance decision-making.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Assessing the most important KPIs for your organization Implementing appropriate frameworks to ensure performance management is accurately measured 	<p>Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four workshops over two days, these events within an event allow your organization to present its content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>

12:30pm – 1:00pm

12:30pm – 1:00pm

12:30pm – 1:00pm

TRACK 1: STRATEGY & LEADERSHIP	TRACK 2: FP&A	WORKSHOPS
<p>PANEL DISCUSSION: CFOs & Healthcare Costs</p> <p>Healthcare is one of the largest expenses within an organization. Employers are responsible for covering the benefits of their employees, a cost which is expected to increase over the next year. Finance executives are tasked with budgeting healthcare costs while ensuring employees still receive quality assistance.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Understanding the varying costs of healthcare Promoting healthcare benefits to attract talent Negotiating health plans that fit your organization's needs and budget <p>Panelists: Joe Richmond, Vice President of Finance, Behavioral Health, Kindred Healthcare</p>	<p>Metrics and Reporting for FP&A*</p> <p>Understanding the metrics FP&A needs to meet is essential to achieving the goals of this function. Whether the metrics are based on ROI, closing opportunities, formalizing procedures, or budgeting, tracking them is critical.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Devising the metrics FP&A professionals should be measured on within your organization Aligning FP&A around the importance of meeting deadlines and achieving goals Translating performance data into manageable numerical targets 	<p>Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four workshops over two days, these events within an event allow your organization to present its content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>

1:00pm - 2:00pm

Networking Lunch Break

2:00pm – 2:30pm

2:00pm – 2:30pm

2:00pm – 2:30pm

TRACK 1: STRATEGY & LEADERSHIP	TRACK 2: FP&A	WORKSHOP
<p>PANEL DISCUSSION: Striving to Be More Customer-Centric</p> <p>Providing a positive consumer experience to drive profit and gain a competitive edge requires changing an organization's culture. Many businesses underestimate the effort required. How can a CFO help lead the effort and drive best practices and customer-centric processes?</p> <p>This session will explore:</p> <ul style="list-style-type: none"> Developing long-term relationships with customers in the digital age Understanding customer needs and shifting processes and products to meet them Pivoting finance to be customer focused <p>Panelists: Lyndsey Zhang, MBA, Chief Financial Officer, MiaSole</p>	<p>Digital Transformation - Overcoming Change Resistance on a Global Scale*</p> <p>Whenever your organization takes on a transformation or improvement project, there is often a resistance to change. These transformations directly impact employees and jobs, which could increase frustrations and disrupt streamlined processes. It is important to understand where to customize transformations and where you don't, especially if your organization is on a global scale.</p> <p>In this session, topics of discussion will include:</p> <ul style="list-style-type: none"> Operational strategy, process changes, and managing budget How to deliver transformation appropriately Budgeting for necessary finance transformations 	<p>Workshops at CFO Live are an exclusive opportunity to truly engage your prospects and clients by hosting a unique and exclusive deep dive breakout session. Capped at four workshops over two days, these events within an event allow your organization to present its content to a select audience. Our content & production team will work closely with you to create a thoughtful and engaging session.</p> <p>Interested in a workshop opportunity? Contact Argyle on sponsorship@argyleforum.com or 646-380-9200.</p>

2:30pm – 3:00pm

TRACK 1: STRATEGY & LEADERSHIP

Fireside Chat: Sustaining Company Culture During Rapid Growth

As an organization goes through high growth periods, the nurturing of company culture becomes harder. But losing the culture that brought the organization success could directly impact the quality of talent within your organization.

This session will cover:

- How to create team building events to enhance company culture and a feeling of togetherness
- How to help employees balance work and life during periods of high stress
- Evolving the policies and practices to allow for greater workplace flexibility and better management of remote workers

Jill Skordinski, *Corporate Controller*,
Corelle Brands

2:30pm – 3:00pm

TRACK 2: FP&A

PANEL DISCUSSION: Deploying AI & Machine Learning*

Artificial intelligence and machine learning-enabled technology solutions continue to flood the market, forcing finance executives to evaluate the solutions available and the benefits they can bring. How do you distinguish between hype and reality? What can AI and machine learning help organizations accomplish in the short and long terms?

In this session, topics of discussion will include:

- How to build the right team to explore and implement AI & machine learning solutions
- How to identify AI use cases and establish enterprise-wide data policies
- Expanding the use of algorithms across the organization once they are proved successful in finance operations

Panelists:
Chris Ortega, *Director of Finance, Americas*, **Emarsys**

2:30pm – 3:00pm

WORKSHOP

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3:00pm – 3:30pm

Afternoon Networking Break*

3:30pm – 4:00pm

Fireside Chat: Evolution of the Finance Function

The requirements of today's CFOs are ultimately more diverse, complicated, and sweeping. They are expected to not only provide counsel to the CEO but to perform a key role in identifying strategic growth opportunities for the business. There's an absolute need for CFOs to evolve in their roles, even if not transitioning into a CEO position. This means adopting a more left-brain right-brain balance where, as numbers people, they can also begin to embrace a more creative, problem solving, and intelligent risk-taking attitude when it's needed.

This session will explore:

- Balancing fiscal prudence with a broader perspective on the benefits of investing in people, training and technologies
- Developing a more collaborate attitude
- Bringing a future-forward perspective that requires giving up control of some day-to-day details

Suk Shah, *MBA, Chief Financial Officer*, **Guaranteed Rate**
Ozan Kaya, *Chief Financial Officer & Chief Operating Officer*, **ShopRunner**

4:00pm – 4:30pm

PANEL DISCUSSION: Recruiting & Retaining Finance Talent*

Developed and talented finance teams often become direct targets for recruiters which results in competitors poaching seasoned talent. Organizations can prevent that by analyzing the competitive landscape for new hires and assessing whether the salaries, benefits and opportunities you offer new and seasoned employees are attractive relative to competition.

In this session, topics of discussion will include:

- Understanding the relationship between your organization's performance and hired talent
- Recruiting productive and talented professionals to increase productivity and company value
- Avoiding the threat of competitor's poaching your outstanding performers

4:30pm

Conference Day Two Concludes