CFO Bootcamp 2020

FEI San Francisco Bay Area is pleased to sponsor the fourth annual CFO Bootcamp – designed for senior finance professionals whose next career step is CFO or current CFOs who want to sharpen their strategic and leadership skills. The CFO Bootcamp program was awarded the FEI 2018-2019 Innovation Award – which recognized one chapter for an initiative which demonstrated creativity and out-of-the-box thinking.

For 2020, CFO Bootcamp has been expanded to include seven main sessions – with each focusing on a specific topic. Sessions will cover law, strategic planning and FP&A, fundraising and capital structure, managing talent, risk management, growth through international expansion, and career considerations. COVID-19 has impacted all of these areas and all sessions will address the new and unique related issues and challenges.

Sessions will be held on successive Wednesday afternoons in September and October 2020. Networking (with breakout rooms for small groups) starts at 3:30pm PT, with the sessions held from 4pm to 6pm/6:30pm PT.

In addition to our presenters and panelists, each session will also include an Executive in Residence to provide mentorship, further perspectives, and experiences/examples. Sessions will also include time for scenario sharing, problem solving, and interaction with fellow Bootcamp attendees.

**SPACE IS LIMITED! Please see https://shorturl.at/uCR34 for the Bootcamp application and please contact Dalyte Kodzis at program.admin@fei-sfba.org with any questions. The deadline to apply is September 3, 2020.**

**Cost**: $199 For FEI SFBA members
$399 For members of other FEI chapters
$499 For non-members ($199 can be applied toward new FEI SFBA Chapter membership)

**CPE credits: 15.5 CPE hours**

**Dates and Times:**
- Formal sessions will be held on successive Wednesday afternoons in September and October 2020. Two social/networking events are also planned.
- See pages 2 & 3 for session dates and times.

**Format:** Interactive webinar

**For company group discounts, please contact us at program.admin@fei-sfba.org.**
Program Schedule

All sessions (except Sessions I, III, and VI with case studies) begin with networking (with breakout rooms for small groups) at 3:30pm PT, with formal sessions running from 4pm – 6pm PT. Please also see below for planned times related to two social/networking events.

Speakers confirmed to date are noted below; other panelists to be announced soon.

I: CFO and the Law  
**September 9**  
2.5 CPE credits (Business Law)

The CFO often has the responsibility for legal matters and is generally the primary interface with outside legal advisors. This session will cover various aspects of the law such as corporate governance, fiduciary duties, and employment law, including COVID-19-specific considerations. The session will also include an interactive case study with breakout groups.

- **Moderator/Executive in Residence:** Ken Schwarz, Managing Director, BrightAvenues LLC
- **Panelist:** John Baum, Partner, Hirschfeld Kraemer LLP
- **Panelist:** Laurie Sanders, Partner, Wendel Rosen LLP

Note: This session will end later than other sessions (through 6:30pm PT) because of the case study.

Social/Networking Event  
**September 15**

II: Strategic Planning and FP&A  
**September 16**  
2.0 CPE credits (Finance)

This session will cover new ways CFOs are being called to harness the data in an organization to develop actionable insights as a strategic business partner; provide decision support by building speed and flexibility into forecasting, planning, and resource-allocation processes; and incorporate new tools and rapid decision-making protocols into the finance team’s day-to-day work – especially in times of volatility, significant change, and increasing risk.

- **Moderator:** Brian Kalish, Principal, Kalish Consulting
- **Executive in Residence:** Sas Mukherjee, CFO and Chief Strategy Officer, York Risk Services

III: Fundraising and Capital Structure  
**September 23**  
2.5 CPE credits (Finance)

A critical component of the CFO role is to manage a company’s capital structure to ensure sufficient liquidity to execute goals and strategies – even more challenging with the impact of COVID-19. During this session, a panel of experienced CFOs will cover the pros and cons of various funding solutions from equity to venture debt to traditional bank debt, steps necessary to prepare for financing, considerations for capital structuring, and managing liquidity. The session will also include an interactive case study related to evaluating, selecting, and executing a financing scenario.

- **Moderator/Executive in Residence:** Robert Miller, Partner, CFOs2GO
- **Panelist:** Robert Breuil, former CFO, Corium International
- **Panelist:** Donald Huffman, Board of Directors (Audit Chair), Amaranthus BioScience Holdings, Inc.; Board Advisor, Aerami Therapeutics (formerly Board of Directors and CFO)
- **Panelist:** Adam Prescott, Executive Director, JP Morgan Chase

Note: This session will end later than other sessions (through 6:30pm PT) because of the case study.
Program Schedule (continued)

IV: Managing Talent  September 30  2.0 CPE credits (Personnel/HR)
With the spread of COVID-19, businesses have had to quickly adapt to changes related to managing remote teams and dealing with challenges associated with team members’ physical and mental health and well-being. This session will provide practical advice on addressing these issues, as well as a discussion of evolving compensation trends and benefits.
- Moderator/Executive in Residence: Garfield Byrd, CFO KIPP Foundation
- Panelist: Scott Dicke, Director of Permanent Placement Services, Robert Half Finance & Accounting
- Panelist: Elizabeth Shober Smith, Vice President of Recruiting, Udemy

Social/Networking Event  October 6

V: Risk Management  October 7  2.0 CPE credits (Mgmt. Services)
In the post-COVID-19 world, CFOs are increasingly expected and need to be Chief Risk Officers. There are multiple aspects of risks that need to be understood, assessed, and proactively managed which this session will cover. These include, but are not limited to: supply chain risk, physical and security risk, disaster recovery/business continuity planning, and insurance coverage. CFOs also need to consider liability estimation and the financial impact associated with the various risks.
- Panelist: John Schaefer, Senior Corporate Risk Manager, Airbnb
- Panelist: Thomas Hebson, Managing Director, Captive and Program Affinity, Sedgwick

VI: Growth Through International Expansion  October 14  2.5 CPE credits (Business Management & Organization)
Establishing operations outside the U.S. is one of the key initiatives that companies employ for scaling growth. This session will discuss the issues and decisions that companies face and need to make as they expand outside of their borders, and will also include an interactive case study.
- Executive in Residence: Joan Varrone, CFO Consulting & Services
- Panelist: Stephen Wares, Vice President, CCW Business Solutions
- Panelist: William Devenish, International Expansion Lawyer, Osborne Clark
Note: This session will end later than other sessions (through 6:30pm PT) because of the case study.

VII: Your Career  October 21  2.0 CPE credits (Personal Development)
With the short tenure of CFOs and the demands of the position, this session will explore how to navigate and thrive in this environment -- including an overview of the employment market for CFOs. This session will also cover effective communications with boards and investors, and leadership with a strategic framework (including becoming a trusted advisor and working on cross-functional teams).
- Moderator: Jason Flanders, Global Executive Director, Robert Half Management Resources
- Panelist: David Cooper, CFO, Ripple Foods
- Panelist: Chris Newman, CFO, Rodan + Fields
- Panelist: Shelly Schorer, CFO, Northern California Division at CommonSpirit Health
Feedback from Attendees of Prior CFO Bootcamps:

- “I had recently transitioned to the Bay Area and the program allowed me to gain 30 to 40 great networking contacts and obtain valuable knowledge and insight into SF Bay industries and trends for CFOs.”

- “We covered all the key topics, from fundraising to mentoring effective teams to overcoming the unknown unknowns. The CFO Bootcamp delivers ROI!”

- “I enjoyed the camaraderie of fellow ‘classmates’ and found the content to be on-point.”

Participants in Prior CFO Bootcamps have included senior professionals from:

- Autodesk, Inc.
- Blue Shield of California
- California Bank of Commerce
- Chevron Corporation
- Autodesk, Inc.
- CSAA Insurance
- Gensler
- Google
- Marin Software
- Nokia Corporation
- One Medical
- Twitter
- Wells Fargo & Company

Prior CFO Bootcamp instructors have included executives from:

- Anaplan
- Foley & Lardner
- Hero Digital
- Hirschfeld Kraemer
- Hornblower Cruises & Events
- HotelTonight, Inc.
- JP Morgan Chase
- Robert Half
- Sharethrough, Inc.
- Silver Springs Network
- Spinta Capital
- Veritas Investments, Inc.

2020 CFO Bootcamp Committee:

- Kristine Aragon
- Shannon Tatum
- Robert Half
- Josette Ferrer
- Clairent Advisors
- CFOs2Go
- Sas Mukherjee
- York Risk Services
- Joan Varrone
- CFO Consulting and Services

About FEI

Financial Executives International (FEI) is a nationwide group of more than 10,000 senior-level financial executives organized around 65 chapters in the U.S. Membership in FEI’s San Francisco Bay Area chapter provides senior finance executives in the greater San Francisco and East Bay region access to many events throughout the year to connect, exchange best practices, as well as participate in professional development sessions on relevant topics and issues. FEI also provides research, webinars, conferences, and publications to its national membership.