



Dates and Times:

Main sessions will be held on successive Wednesday evenings in May 2019: 5/1; 5/8; 5/15; and 5/22 from 5:30pm-8pm, with a happy hour planned for June 12

Location:

Robert Half, 50 California Street, 10th Floor, San Francisco

Cost:

\$150 for SFBA Chapter FEI members

\$250 for non-members (*\$100 can be applied toward new FEI SFBA Chapter membership prior to 8/31/19*) and for non-SFBA Chapter FEI members

CFO Bootcamp 2019

FEI San Francisco Bay Area is pleased to sponsor our 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.

CFO Bootcamp is comprised of four main sessions covering **CFO and the Law, Fundraising and Capital Structure, Managing Talent, and Your Career** – to be held on successive Wednesday evenings in May 2019. Networking starts at 5:30pm, with sessions held from 6:00pm to 8:00pm.

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 <http://bit.ly/2019CFO-Bootcamp> for the Bootcamp application and contact Sofia Perel at program.admin@fei-sfba.org with any questions. **The deadline to apply is 4/10/19.**

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 access to many events throughout the year to connect senior finance executives to exchange best practices as well as provide education on relevant topics to finance executives in the greater San Francisco and East Bay region. FEI also provides research, webinars, and publications to its national membership.

Program Schedule

I: CFO and the Law

May 1

2.0 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, and will include an interactive case study.

- *Moderator/Executive in Residence: Ken Schwarz, Managing Director, BrightAvenues LLC*
- *Panelists: John Baum, Partner, Hirschfeld Kraemer LLP; Kyle Chin, General Counsel, Crocus Technology; Laurie Sanders, Partner, Osborn McDerby LLP*

Note: This session only will end later than other sessions (through 8:30pm).

II: Fundraising and Capital Structure

May 8

2.0 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. This session will cover: various financing solutions from equity to venture debt to traditional bank debt, steps necessary to prepare for financing, considerations for capital structuring, and investment policies.

- *Moderator/Executive in Residence: John Moffett, Consulting CFO*
- *Panelists: Adam Prescott, Senior Vice President, JP Morgan Chase; Todd Schneider, Partner, Spinta Capital*

III: Managing Talent

May 15

2.0 CPE credits (Personnel/HR)

A company's success depends on having the right talent, and the Bay Area faces critical shortages as well as competition from marquee companies and unicorns. This session will provide practical advice on addressing these issues as well as a discussion of compensation trends.

- *Executive in Residence/Panelist: Garfield Byrd, CFO, KIPP Foundation*
- *Panelists: Scott Dicke, Director of Permanent Services, Robert Half Finance & Accounting; Kayla Vatalaro, Head of Talent and Recruiting, Asana, Inc.*

IV: Your Career

May 22

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: Attila Bardos, Principal, Robert Half Executive Search*
- *Panelists: Nick Gerostathos, CFO, Hero Digital; Julie Ruehl, CFO, Fly Leasing Limited; Rob Williams, CFO, Hornblower Cruises and Events*

Happy Hour/Social Event

June 12

