Amy Davis, CFO
RS&H

Amy Davis, CPA serves as the CFO for RS&H, joining the national architecture, engineering, and consulting firm in April 2022. Amy works with senior management and the company's board to develop finance and business strategies to further strengthen its growth and position as an industry leader.

Amy holds a BSBA in Accounting & Business Administration from Robert Morris University and has a progressive background with more than 25 years of global business and finance leadership across diverse industries, including A/E/C, retail, manufacturing, and Big 4 public accounting. She has extensive experience spanning controllership, strategic planning, operations finance, treasury and capital markets, mergers and acquisitions, and enterprise risk management. Most recently, she served as CFO for Michael Baker International.

She is also actively involved in several industry and professional associations, including Ernst & Young's alumni council. She and her family love the beach, spending time at their beach house in the Outer Banks and are die-hard fans of the Pittsburgh Steelers and Penguins.

Andy Watts, EVP & CFO
Brown & Brown Insurance
fiCFO Advisory Board Member

Andy Watts' style of high-impact financial leadership at Brown & Brown has delivered a heightened focus on financial discipline, capital allocation and decision support for the business.

Andy is responsible for all financial aspects of the organization, including treasury and investor relations. He also supports strategy, acquisitions and the board of directors. Before joining Brown & Brown, Andy spent 12 years at Thomson Reuters, where he held several positions, including global head of customer administration and CFO of the Investment and Advisory Division of Thomson Reuters Markets.

Andy currently sits on the board of directors for New Planet Energy Development, an organization focused on recycling, manufacturing of alternative renewable fuels and bio-refinery technology. He is also on the advisory board for his alma mater, Illinois State University (ISU) College of Business and was inducted into the ISU College of Businesses Hall of Fame. Andy is currently serving a three-year term on the Federal Reserve Bank of Atlanta, Jacksonville Branch Board of Directors until 2025. He is also a member of the Florida Chamber Board of Trustees.

Andy previously held the Certified Public Accountant (CPA) designation and holds a Bachelor of Science degree from Illinois State University. He resides in Daytona Beach, Florida, is married with two daughters and enjoys golf, basketball, skiing and traveling.

April Frazer, CFO CIB Banking
Wells Fargo Bank, NA

April Frazer is the Chief Financial Officer (CFO) for CIB Banking, where she leads day- to-day financial management, planning, and capital and balance sheet optimization for the group. She also works with the Bank's leadership team to drive strategic decision-making and financial performance for Banking.

April is a seasoned banker and financial services industry veteran who has a deep first-hand understanding of CIB Banking. She brings more than two decades of experience to the role and has held numerous senior leadership positions within Wells Fargo. Most recently, she was the head of Banks for CIB where she led the coordination of all investment banking and corporate banking activities across the Banks client segment globally. Prior to that, she was the managing director and Global Head of Banks in the Financial Institutions Group, where she was responsible for strategy and growth of the company's global bank portfolio.

Previous roles with Wells Fargo include managing director in Wells Fargo Securities' Financial Institutions Investment Banking Group where she led the group's Global Regulatory Capital and Advisory practice and several positions in High Grade Debt Capital Markets as part of the Client Solutions Group and Financial Institutions Investment Banking.

April was recognized as one of the 15 Most Powerful Women in Banking: NEXT in 2019. She is on the Martha & Spencer Love School of Business Board of Advisors for Elon University, the St. Jude Carolinas Advisory council, and a committee member for the St. Jude Charlotte Celebrity Chef & Wine Dinner in Charlotte, NC. April holds a Bachelor of Science from Elon University, where she graduated summa cum laude. She was also awarded the John W. Barney Award, which is given to the graduating senior with the highest cumulative GPA.

Ashley Regner, Partner
Ernst and Young, LLP

Ashley Regner serves as EY's Financial Services Markets Growth Leader for the Consulting Practice, and CPA based in Houston, Texas. Ashley has over 20 years of financial services experience, including industry operations and consulting experience focused leading enterprise-wide transformation agendas in Finance, Risk, Treasury and Data in the Banking and Capital Markets sector. Additionally, Ashley leads our Financial Services Sector Consulting Practice for the South Market in the United States leading over 3,000 of our talented associates.

Ashley graduated cum laude from the University of Alabama, where she received a degree in Business Administration, followed by a Masters of Accountancy degree. Prior to joining EY in 2015, Ashley was a Senior Vice President at Regions Financial Corporation for nearly 10 years across Finance, Risk and Audit departments. Prior to Regions, Ashley worked in public accounting for nearly 5 years serving leading large banking audits across the Mid-South business market.

Ashley also serves in various community service organizations. She serves on Advisory Board for the University of Alabama Culverhouse of Business Administration, a leader in the Fort Bend County Zeta Tau Alpha alumnae chapter, and sustainer for the Junior League of Birmingham, Alabama. Ashley is a licensed CPA in the State of Texas and is a member of the AICPA.

Casey Rodgers, CFO
Vinik Sports Group (VSG)
fiCFO Advisory Board Member

Casey Rodgers is the Chief Financial Officer of Vinik Sports Group (VSG), the operator of the Tampa Bay Lightning, Amalie Arena, and the Yuengling Center.

Mr. Rodgers is a senior executive with multifaceted international and domestic industry experience who provides corporate and operational strategy that helps drive companies to record success. He is adept at forecasting trends and working with diverse executives to improve cash flow and profitability while improving customer relations. Mr. Rodgers is known for pioneering strong financial and administrative organizations that generate accurate, meaningful, timely, and actionable information.

Mr. Rodgers has held key roles in aviation, healthcare, pharmaceuticals, consumer products, entertainment, and sports. In addition, his experience includes the restructuring of several finance, people operations, and legal departments, implementation of advanced software systems, and improvement in cash flow through strong accountability processes. Further, he excels at generating standard operating metrics for domestic and international affiliates, creating balanced compensation plans and pricing methodologies, and achieving cost savings through efficiencies and negotiation of contracts.

Prior to joining VSG in 2017, Mr. Rodgers was the Global Vice President of Financial and Strategic Planning for FELD Entertainment, Inc., the world's premiere provider of live family entertainment. In addition, he has over 20 years of experience working in the corporate finance world.

Mr. Rodgers holds a Master of Business Administration from the University of Maryland Robert H. Smith School of Business and a Bachelor of Science in Aviation Management from Florida Institute of Technology.

Charlie Dougherty, Director & Senior Economist
Wells Fargo Corporate & Investment Banking

Charlie Dougherty is a director and senior economist with Wells Fargo's Corporate and Investment Bank. Based in Charlotte, North Carolina, he covers the U.S. economy with a focus on commercial real estate, housing, construction, and regional sectors of the economy. He regularly writes indicator reports, produces special commentary, and contributes to the company's Weekly Economic & Financial Commentary. His commentary on the U.S. economy has been featured in various regional and national media publications, including Bloomberg News, Yahoo Finance, and The Washington Post.

Before joining Wells Fargo in 2017, Charlie worked as a regional economist and consultant for IHS Markit and more recently for CertainTeed, one of the largest building product manufacturers in North America. Charlie holds a B.A. and B.S. in economics and finance from the University of Pittsburgh and a M.A. in economics from Temple University in Philadelphia. He is a member of the National Association of Business Economics, Philadelphia Council of Business Economics, and Charlotte Economics Club.

Cheryl Grise, Americas Industry and Solutions Leader
EY

Cheryl is the EY Americas Industry and Solutions Leader, Women. Fast Forward Americas Executive Sponsor and EY North America Entrepreneurial Winning Women Program Executive Sponsor. She is an energetic and forward-thinking transformational leader who is passionate about helping clients navigate significant changes and grow their business in a connected, fast-paced and complex world.

At EY, Cheryl developed a new methodology and toolset to help activate the firm's Vision 2020 implementation. She also led the Global Advisory Strategy practice, where she launched the Purpose-Led Transformation team and capability in the marketplace for clients.

Cheryl was the co-founder of the Beacon Institute, which she helped launch at the World Economic Forum in Davos. To drive Purpose Led Transformation, she worked closely with an author and thought leader to help companies "discover and activate their why." She introduced new research in collaboration with the University of Oxford's Saïd Business School and HBR Analytic Services on the topic of using purpose to transform and drive new levels of growth and innovation.

Cheryl has spent the last 25 years of her career in consulting with EY, IBM, and PwC where she held various senior leadership roles. Throughout her career she has served as the Lead Transformation Partner on strategic enterprise programs to optimize clients' business models, processes, and providing support to business systems to deliver significant and measurable returns. In 2006, Cheryl was a contributing author to the book Can Two Rights Make a Wrong? Insights from IBM's Tangible Culture. She was also an adjunct professor at Carnegie Mellon University, where she taught a graduate course on Transformational Leadership. In her many years of experience one key theme emerges - Cheryl helps clients transform.

Chris Aisenbrey, Chief Human Resources Officer
Raymond James Financial

Chris Aisenbrey is the Chief Human Resources Officer at Raymond James Financial. In his role as CHRO, Chris leads all human resources functions including talent acquisition, talent development, diversity & inclusion, executive compensation & total rewards, employment practices, HR technology, and workforce planning to ensure human capital strategies align with the firm's culture and growth. Chris is also a member of the firm's Operating Committee.

Prior to his current role, Chris was Senior Vice President of Organization and Talent Development where he was responsible for talent development, training, diversity and inclusion, assessment and employee engagement. He also served as the Chair of the SIFMA Diversity and Inclusion Advisory Council.

Prior to Raymond James, Chris held senior HR leadership roles at Fortune 500 companies. He was Group Director of Talent Management & Leadership Development at The Coca-Cola Company for their North America business, as well as the Bottling Investments Group. Prior to Chris' nine years at Coca-Cola, he served as Director, Global Talent Acquisition and University Relations at Whirlpool Corporation in Benton Harbor, Michigan. Chris began his career at McKinsey & Company where he held leadership roles within recruiting and professional (consultant) development. Chris holds a Master of Science degree in Human Resources from New School University (New York City) and a Bachelor of Science degree in Business Management from Ithaca (NY) College.

Chris Meyer, EVP & CFO
Bloomin' Brands

Christopher (Chris) Meyer was named Executive Vice President, Chief Financial Officer of Bloomin' Brands in March 2019 after serving as Group Vice President of Financial Planning & Analysis and Investor Relations. As CFO, Chris is responsible for the company's business analytics and global strategy, as well as all areas of financial planning and reporting for Bloomin' Brands, including accounting services, corporate tax, treasury, and investor relations.

Since joining Bloomin' Brands in 2004, Chris has held positions of increasing responsibility in the areas of Finance, Accounting, and Investor Relations. He led the Treasury function during the company's successful sale-leaseback program and through four successful refinancing transactions since 2014. He also implemented the company's share repurchase and dividend program, which returned $1 billion to shareholders over a five-year period. Prior to Bloomin' Brands, Chris was the Group Finance Officer at Kforce. Chris earned an MBA and a bachelor's degree in business administration from the University of Florida, and he served as the President of Florida Blue Key.

Christina Clohecy, CFO
Newfold Digital
fiCFO Advisory Board Member

Christina brings more than 20 years of financial experience and is responsible for Newfold Digital's financial strategy and finance operations. Most recently, she held leadership positions with Siris Capital portfolio companies Stratus Technologies, Inc., which she joined in 2016 as CFO, and Airvana. Previously, she held a series of positions at both Sycamore Networks Inc. and Vitronics Soltec.

Christina has an MBA from Babson College and a BS in business from Southern New Hampshire University. Christina is on the board for the American Heart Association and InvestCloud.

Cort Sabina, EVP & CFO
WastePro USA
fiCFO Advisory Board Member

Cort Sabina has more than 35 years of in-depth accounting and financial management experience. At Waste Pro, he has served as Corporate Controller, Vice President, and Chief Accounting Officer and is presently Executive Vice President and Chief Financial Officer.

Cort was elected to the Waste Pro board of directors in March 2015. Cort's experience began with one of the Nation's largest Taft-Hartley Health and Welfare and Pension Funds, Central States Southeast and Southwest Areas Health and Welfare and Pension Funds in Chicago. During his 10 years with Central States, he held a variety of positions including Staff Auditor and Audit Manager. Widening his accounting skills in public accounting, he joined the "big four" firm Ernst & Young in Chicago, IL. He followed that role as Division Controller with Allied Waste in the Chicago market. In 2000, Cort moved to Florida to join Florida Recycling Services (FRS). Following an acquisition by Waste Services (Progressive Waste), Cort continued with the company as a District/Regional Controller. Cort joined the management team of Waste Pro USA as Corporate Controller in July 2006.

Cort is a member of the Rollins College Financial Leadership Network (FLN) as part of the CFO Council. Cort is an Advisory Board Member for Blackstone Global Insurance.

David Hecht, CFO
Luxury Brand Partners

David is the CFO of Luxury Brand Partners, a private-equity backed incubator of high performance, artist-based beauty brands. Portfolio companies have included Oribe Hair Care, Becca Cosmetics, R+Co., and One/Size Beauty. Prior to Luxury Brand Partners, Mr. Hecht was a Senior Vice President of Business Development and Strategy at World Fuel Services, a publicly traded energy and logistics provider. Prior to World Fuel Services, Mr. Hecht was a senior investment banker at Morgan Stanley and a corporate attorney at Skadden, Arps, Slate, Meagher and Flom. He is a Certified Public Accountant and a member of the New York State bar.

David Jordan, CFO of the Americas
TD SYNNEX

David Jordan is the Chief Financial Officer of the Americas at TD SYNNEX. In his role, he is responsible for overseeing all financial aspects of the Americas business. Prior to TD SYNNEX, Mr. Jordan was with Tech Data for 7 years, serving most recently as the Chief Financial Officer of the Americas. Mr. Jordan earned a bachelor’s and master’s degree in accounting from the University of Florida.

David Kantaros, Co-Chair for Artificial Intelligence
Foley & Lardner

David Kantaros serves as Co-Chair for Artificial Intelligence within Foley’s Innovative Technology sector and is a member of the Private Equity & Venture Capital and Transactional & Securities Practices. He represents venture capital and private equity funds as well as publicly and privately held corporations in the emerging technology and life science industries.

Eduardo Bezerra, EVP & CFO
Perrigo
Eduardo Bezerra joined Perrigo Company Plc in May 2022 as Executive Vice President and Chief Financial Officer. Mr. Bezerra previously served as Senior Vice President and Chief Financial Officer for Del Monte Fresh Produce, Inc., from 2019 to 2022. Prior to his role at Fresh Del Monte, he served in multiple finance positions, as well as Commercial and Strategy, with increasing responsibility from 1998 to 2019 through assignments in Brazil, Costa Rica, Argentina, USA and has led Global Finance Teams across all 5 continents at Monsanto Company, when then Monsanto was acquired by Bayer AG.

Mr. Bezerra holds a Bachelor of Science degree in Civil Engineering from Escola Politécnica of University of São Paulo, a Master of Business Administration degree in Finance from IBMEC Business School, São Paulo in Brazil, completed 14th General Management Program at Harvard Business School in April 2013 and A CFO Program at Chicago Booth Business School in 2018.

Ere Furbino, Partner, Financial Accounting Advisory Services
EY
Ere has over 20 years of business experience serving multi-national clients in a range of industries, including clients in the cruise and theme park industry. Ere has led several domestic and multinational transformational projects, including transactional and finance optimization projects (e.g., M&A, process improvement and automation, etc.). He has provided project leadership and finance function services to domestic and foreign multi-national companies by assisting his clients navigate the financial reporting challenges and complex accounting considerations triggered by strategic transactions, regulatory changes, and transformational initiatives.

More recently, Ere often teams with organizational leaders to spearhead their most strategic and pressing initiatives and projects; including identifying, evaluating, and developing practical responses to potential impacts of each critical decision across the organization (i.e. people, processes, data, and technology)

As a co-leader of our Cruise & Theme Parks Center of Excellence, Ere also serves in a client-centric leadership capacity for Norwegian Cruise Lines and Disney FL/DPEP. He has built an extensive network of professional across the globe as a result of serving multi-national clients and two multi-year global assignments – Amsterdam and Tokyo.

Frank Forbes, CFO
MedPro Healthcare Staffing
Frank Forbes is the Chief Financial Officer at MedPro Healthcare Staffing. MedPro is a Joint Commission certified, leading provider of contract staffing services including travel nursing and allied health to facilities throughout the U.S. Since joining in 2029, Frank has been heavily involved in driving employee engagement and culture at MedPro, helping to create a unique and award-winning work environment that drives results. (MedPro has been named a SunSentinel Top Workplaces organization for six of the past seven years.) A native of Canada, Frank became a Chartered Accountant with Deloitte and earned his CPA after arriving in the U.S. in 1998.

Fred Pensotti, CEO & CFO
ERC Pathlight
fiCFO Advisory Board Member
Fred brings more than 20 years of strategic business and team leadership experience to the role of CFO. Throughout his career, Fred has been responsible for financial performance management, including capital raising, investor relations, financial planning and analysis, accounting, tax, treasury, revenue cycle management, human resources, facilities, and strategic sourcing at companies ranging from start-ups to multi-billion dollar publicly-traded and private-equity backed businesses in various industries, offering various perspectives and partnering with business operators to improve operational performance.

He has held CFO roles at Landstar System, Inc., One Call, Radial Inc., and Interline Brands. Earlier in his career, Fred spent time in various management positions of increasing responsibility at American Airlines and then at the global travel technology leader, Sabre Corporation, where he was SVP Finance & Corporate Controller, Treasurer, and CFO of each of Sabre's three business segments, including Travelocity.

Fred lives in Ponte Vedra Beach, Florida with his family and is an active board member of several professional and non-profit organizations. He is a licensed CPA and CFA, earned his MBA from Cornell University's Johnson Graduate School of Management, and holds a BBA in finance and international business from the University of Texas at Austin. He is an avid traveler, skier, and tennis player.

Hosana Fieber, CFO
Organics Management Holdings & Board Member Tervis

Hosana Fieber recently joined Organics Management Holdings as Chief Financial Officer. Organics Management Holdings is based in Orlando and promotes sustainable business practices by diverting organic materials from landfills and reusing them to create beneficial soils that save water, reduce reliance on chemical fertilizers, and provide beautiful landscapes.

Previously, Hosana was Chief Financial Officer for Tervis Tumbler, the original manufacturer of reusable double-walled, insulated plastic cups, based in Sarasota, Florida, USA. In this role, she led the finance and information technology department. Using her passion for sustainability, Hosana has also spearheaded a new initiative to accelerate Tervis' elimination of single-use plastics from the operations floor and product packaging. To further Tervis' reputation as an eco-friendly company, Hosana implemented a program to manufacture recycled items with all product returns through their lifetime guarantee program.

Hosana began her career almost 18 years ago in public accounting at Kaufman Rossin, a reputable regional firm in Coral Gables, Florida. Later, she moved to Dixon-Hughes in Charlotte, North Carolina, to work in consulting. She then transitioned to the manufacturing industry and returned to Florida. She has worked with ASO, a global private label bandage manufacturer, and Tervis. In both industry positions, she worked with "Made in USA'' companies that import raw materials from abroad. Although U.S.-based manufacturing is her professional expertise, she continues to concentrate and learn more about foreign supply chain improvements.

Hosana has a Bachelor of Arts from the University of Miami and a master's degree in business from Florida State University. She lives in Sarasota, Florida, with her husband and four children.

Ira Birns, EVP & CFO
World Fuel Services Corporation
fiCFO Advisory Board Member

Birns is responsible for the executive leadership of the company's financial organization including external reporting, accounting, financial planning and analysis, strategic business unit finance, internal audit, treasury, tax, credit underwriting and collections, non-fuel procurement, risk management, corporate development, and investor relations. Prior to World Fuel, Birns served as vice president and treasurer, and vice president of investor relations at Arrow Electronics, Inc., a global provider of technology products, services and solutions to leading technology manufacturers and service providers.

He currently serves as the vice chairman and treasurer of the New World Symphony in Miami, Florida and serves as a Board Member of the Florida Holocaust Museum based in St. Petersburg, Florida. He previously served as chairman of the Association for Financial Professionals, a professional society committed to advancing the success of its finance and treasury members and their organizations, globally. Birns holds a Bachelor of Business Administration degree in Public Accounting from Hofstra University. He is a certified public accountant as well as a certified treasury professional.

Joe Partlow, CTO
ReliaQuest

Joe Partlow is the CTO of ReliaQuest, a leading Information Security services provider and is currently involved with new product initiatives along with research and development efforts. Joe has been involved the Information Security field for over 20 years, in both the defensive side and offensive capabilities. Current projects and interests include data ingestion/analytics at scale, DFIR, threat intelligence & Hunting, security metrics & automation and machine learning. Joe has experience in many business verticals including retail, healthcare, financial, state/local government and the Department of Defense.

He is a regular speaker and contributor at security conferences, groups and associations. Joe has a degree in Computer Information Systems and holds many industry-specific certifications.

John Geller, President & CEO
Marriott Vacations Worldwide

John E. Geller, Jr. serves as President & Chief Executive Officer for Marriott Vacations Worldwide Corporation and is a member of the company's executive committee. In addition to finance and accounting, Mr. Geller also has responsibility for human resources, information technology, and global vacation ownership operations.

Mr. Geller began his career in 1989 with Arthur Andersen in Washington, D.C., as a staff auditor and coincidentally, his first client assignment was Marriott International. In 2000, he became an audit partner within the real estate and hospitality practice. He moved to Ernst & Young in 2002, where he served as a partner in their real estate and hospitality practice. In December 2004, Mr. Geller left public accounting to assume the position of chief financial officer of AutoStar Realty – a real estate investment company sponsored by Staubach Companies and iStar Financial – which focused on financing automotive real estate.

Mr. Geller joined Marriott International in 2005 where he served as senior vice president and chief internal audit and information security officer. From May through December 2008, he was the chief financial officer for the Western Region of North America Lodging Operations, after which he transitioned to the role of chief financial officer at Marriott Vacations Worldwide Corporation until December 2017, when he assumed responsibility for the information technology and human resources departments. In January 2021, Mr. Geller was appointed to his current role of President and Chief Executive Officer where his responsibilities expanded to include global vacation ownership operations. While CFO for Marriott Vacations Worldwide, John served on fiCFO's Advisory Board.

Mr. Geller holds his Bachelor of Science degree in accounting from Pennsylvania State University.

John Miller, SVP of Finance
Orlando Health

John joined Orlando Health in 2016 as vice president of finance for the organization. Previously, John was corporate controller for UNC Health Care, a $4 billion health system based in Chapel Hill, North Carolina. His prior experience also includes serving as vice president of finance/chief financial officer at Mercy Health system, a 30-hospital system based in Cincinnati. He began his career with Ernst & Young serving healthcare clients nationally in the assurance and advisory practices.

John holds a bachelor's degree from Ohio State University (Columbus) and is a CPA. He currently serves on the board of Shepherd's Hope, a volunteer organization in Orlando that provides access to healthcare for the uninsured.

Karen O'Byrne, CFO Advisor & SVP
Warburg Pincus

Karen O'Byrne joined Warburg Pincus in 2022 and is a CFO Advisor on the Value Creation team. Karen brings more than 30 years of financial and operational experience, leading growth-oriented technology organizations. Prior to joining Warburg Pincus, Karen was the President and Chief Executive Officer at Motus LLC, having previously served as its Chief Financial Officer. Prior to Motus, Karen was the Chief Financial Officer at Modernizing Medicine and Campus Management, and held the lead finance role in the Web Hosting unit of Verio, Inc. She received her MBA and BS in Accounting both from the University of Florida. While CFO at Motus, Karen served as a member of fiCFO's Advisory Board.

Kay Neely, EVP & CFO
Sila Realty Trust

Kay C. Neely is the Executive Vice President and Chief Financial Officer of Sila Realty Trust, Inc. Ms. Neely is a member of the Management Committee and is responsible for the financial operations of the company including capital markets and financial reporting, as well as oversight of the investor relations and human resources departments.

Ms. Neely joined the company in January of 2016 and brings approximately 20 years of real estate accounting and operations experience. Ms. Neely started her career with KPMG LLP in 1999 and was responsible for various functions within the audit practice including the planning and oversight of audit engagements for public and private entities, primarily in the real estate sector, including real estate investment trusts and investment funds. In addition, she managed the daily operations, performance management and financial planning for audit practices in 10 offices located in the Southeast and Puerto Rico.

Ms. Neely graduated as a member of Beta Gamma Sigma from Emory University, Goizueta Business School in Atlanta, Georgia, in 1998 with a Bachelor of Business Administration with concentrations in accounting and finance. She holds a current Certified Public Accountant license in the state of Georgia.

Kevin Lansberry, EVP & CFO
Disney Parks, Experiences and Consumer Products

Kevin Lansberry, Executive Vice President and Chief Financial Officer, Disney Parks, Experiences and Consumer Products, has been with The Walt Disney Company since 1986. In his role, Kevin is responsible for the financial planning and fiscal management of domestic and international theme parks and resorts, the Disney Cruise Line, the Disney Vacation Club, Adventures by Disney, Walt Disney Imagineering, Revenue Management and Analytics, Global Business Development and Consumer Products.

Kevin began his career in Finance as a clerk supporting the Walt Disney World Resort and worked in a multitude of roles in Finance, Business Development, Alliance Development, leaving in 2005 to lead the Disneyland Resort Finance team.

In 2007, Kevin returned to Florida to accept an operational role as Vice President, Downtown Disney. His operational responsibility later expanded, and he eventually moved into the position of Vice President, Disney's Animal Kingdom. In 2010, he was named Senior Vice President, Worldwide Travel Operations, where he led Worldwide Call Center and Consumer Direct Sales Operations for all Walt Disney Parks and Resorts locations. Kevin served as Senior Vice President, Revenue Management and Analytics for the Walt Disney Parks and Resorts segment, then SVP/CFO Domestic Business in 2013, adding the international businesses in 2015. Kevin assumed the position of Executive Vice President and Chief Financial Officer, Walt Disney Parks and Resorts in May 2017 with the addition of Consumer Products in March 2018.

Kevin holds a Bachelor of Science in Finance from Ball State University and a Master of Business Administration from the Crummer School of Business at Rollins College.

Kirk Larsen, President & CFO
Black Knight

Kirk Larsen is the President and Chief Financial Officer of Black Knight, Inc. (NYSE:BKI), a premier provider of software and data and analytics to the mortgage and consumer loan, real estate and capital markets verticals. In his role as President, Kirk is responsible for providing strong leadership for Black Knight and working with the company's corporate groups, including human resources, marketing, enterprise risk, legal and compliance, to establish and support execution of short- and long-term goals, plans and strategies. As CFO, Kirk is responsible for the overall financial management of the company, including financial planning and analysis, financial reporting, operational finance, investor relations, capital allocation and liquidity management. Kirk previously served as a member of fiCFO's Advisory Board.

Prior to joining Black Knight, Kirk was Corporate Executive Vice President, Finance and Treasurer of FIS, a global leader in financial services technology. In this role, he was responsible for all treasury-related activities, including developing and maintaining relationships with financial institutions and rating agencies, liquidity management, interest rate and foreign currency risk management, and evaluation and implementation of capital allocation alternatives. In addition, he was responsible for financial planning and analysis and strategic financial planning. Kirk earned his bachelor's degree in accounting from the University of Wisconsin-Madison.

Kyle Rodrigue, CFO
New York Life, Direct-to-Consumer Division

Kyle Rodrigue is the Chief Financial Officer for New York Life's $1B+ direct-to-consumer division (NYL Direct), based in Tampa, FL. He serves as a member of the executive team for NYL Direct, delivering leadership for the industry leading provider of direct marketing life insurance, with responsibility for all financial and actuarial matters. Mr. Rodrigue joined New York Life in 2010 and has since served in multiple roles of increasing responsibility. Prior to becoming CFO in 2019, he was a vice president within corporate finance, responsible for leading financial planning and analysis, advising senior management on the company's financial performance.

Mr. Rodrigue previously held various financial management roles at other large public and privately owned companies. He earned a B.S. in Accounting from Southern New Hampshire University and an M.B.A. from the University of South Florida.

Leslie Lunak, CFO
BankUnited
fiCFO Advisory Board Member

Leslie N. Lunak has been BankUnited's Chief Financial Officer since March 2013. Ms. Lunak served as the Bank's Executive Vice President and Chief Accounting Officer from June 2012 through March 2013 and as Senior Vice President, Finance from October 2010 through June 2012.

From August 2004 through October 2010, Ms. Lunak was an Audit Director at the public accounting firm McGladrey & Pullen, LLP. Her responsibilities included overseeing audit engagements and the performance of financial and accounting consulting services for clients primarily engaged in the financial services industry, serving as a designated national financial services industry specialist, and serving as a subject matter expert in a variety of technical accounting areas, including derivatives, equity instruments, fair value accounting and acquisition accounting. She was also responsible for the development and presentation of a wide variety of continuing education courses for both internal and external audiences.

From 2001 through August 2004, Ms. Lunak was a senior audit manager with the certified public accounting firm Adair, Fuller, Witcher and Malcom, with oversight responsibility for all of the firm's audit engagements. From June 1985 through 2001, Ms. Lunak was an independent consultant, providing finance and accounting related services to clients consisting primarily of community banks and thrifts and the U.S. Drug Enforcement Administration. From 1979 through June 1985, Ms. Lunak was with the public accounting firm Deloitte, where she was an audit manager serving primarily clients in the banking industry and was designated a national banking industry specialist.

She was named one of South Florida Business Journal's Influential Business Women of 2019 and is a member of the Board of Directors of the Urban League of Broward County. Ms. Lunak is a Florida CPA and received a B.S. in Accounting from Oklahoma State University.

Lisa Stevens, Chief People Officer & Head of Global Human Capital Solutions
Aon

As Chief People Officer, Stevens is responsible for creating, implementing and leading the strategies that empower Aon's 50,000 employees across 120 countries to fully align with the client-centric Aon United mission. Stevens leverages her ability to deliver business results as she leads the People Organization, including culture & change, talent, rewards and diversity, equity & inclusion strategies and their global functions. Reporting to the CEO, Stevens plays a critical role in overseeing the coaching and executive talent development and succession planning strategies for Aon. In addition to her CPO role, Stevens leads Aon's Global Human Capital Solutions business which provides clients with a powerful mix of data, analytics and advice to help them make better workforce decisions. With 2,000 colleagues across 30 countries, the team includes Rewards, Talent Assessment, Corporate Governance, ESG consulting and performance & analytics practices. Globally, HCS generates $550M in revenue.

Stevens joined Aon in 2018 as Executive Vice President of Aon United Operations where she led the Delivering Aon United strategy and adoption to accelerate client value creation and drive growth by increasing collaboration across geographies and solution lines.

Her leadership objective is for colleagues around the world to be inspired by the Aon United mission, committed to inclusive people leadership and work as a unified global team to build and be a part of a firm that consistently delivers great outcomes for clients, and even greater impact in the communities we serve around the world.

Mark Doller, Managing Director, Investment Bank
Bank of America

Mark Doller is a Managing Director in Bank of America's (BofA) investment bank, based in Atlanta. He has ~20 years of investment banking experience. Mark started his banking career at Wachovia Securities, before spending 12 years at Citigroup in their Global Industrials Group. Mark has been at BofA since 2017.

Throughout his career, he has been involved in over $50 billion in M&A transactions and over $30 billion in capital raisings. He has extensive experience in M&A advisory, ranging from large public cross-border deals to small domestic private deals. He also has executed a number of capital markets transactions, including several IPOs, convertibles, follow-on equity offerings and bond offerings.

Prior to his banking career, Mark worked as a civil engineer for AMEC plc in Nashville. He has a bachelor's and a master's degree in Civil Engineering from the University of Kentucky and an MBA in Finance and Accounting from the Kellogg School of Management, Northwestern University.

Mark Kempa, EVP & CFO
Norwegian Cruise Line Holdings Ltd.

fiCFO Advisory Board Member

Mark A. Kempa is Executive Vice President and Chief Financial Officer of Norwegian Cruise Line Holdings Ltd., appointed to this position in August 2018. In his role, Kempa is responsible for developing and executing the Company's financial strategy and overseeing all finance functions, including corporate financial planning, accounting, treasury, tax, as well as information technology, corporate strategy and investor relations.

A twenty-year veteran of Norwegian, Kempa held several positions of increasing responsibility in Norwegian's finance organization, playing an instrumental role in several of the Company's key milestones, including its successful initial public offering in 2013 and the acquisition of Prestige Cruises International, Inc. in 2014. In addition, he spent three years representing the financial interests of the company's expansive newbuild program while positioned overseas in Germany; and, also held various roles in accounting and internal audit.

Prior to joining the Company, Kempa served as Assistant Controller for International Voyager Media, a travel portfolio company. He holds a Bachelor's degree in Accounting from Barry University.

Michael Evanoff, CFO
Vohra Wound Physicians

As CFO, Evanoff is responsible for all financial functions including accounting, finance, tax, human resources, facilities, and revenue cycle management. His career spans more than 30 years of experience in leading organizations with mergers and acquisitions, private equity, high growth operations, new technology development, healthcare, and operational streamlining.

Prior to his role at the Vohra team, Michael was CFO of Automated Healthcare Solutions, a private equity funded healthcare tech company, operating in 32 states where he and the team led a 300% increase in the business over five years.

Michael was also the CFO of Channel Intelligence (CI), a private equity backed e-commerce company that grew to provide internet marketing technology to the majority of the top 100 internet retailers. Google acquired CI as part of what is now known as Google Shopping. He led various mergers and acquisitions activities, and several rounds of equity raises. Michael started his career in executive development roles with Mobil Oil for 11 years domestically and internationally.

Michael earned a Master of Business Administration in International Business from Temple University and a Bachelor of Science in Business Administration specializing in Marketing and Finance from Marquette University.

Nate Wilson, SVP & CFO
Disney's Consumer Products, Games and Publishing

Nate brings more than 30 years of financial experience all with Disney and is currently SVP and CFO of Disney's Consumer Products, Games and Publishing (CPGP) division which is a subset of Disney Parks, Experiences and Products. He is responsible for CPGP's financial operations and strategy. Prior to this, Nate held the same position at Walt Disney World for 8 years. Nate has an MBA from the Kenan Flagler Business School at the University of North Carolina and a BBA from the University of Cincinnati.

Nicole Milnthorpe, CFO
National Dentex

Nicole Milnthorpe recently joined as Chief Financial Officer of National Dentex, a Cerberus portfolio company. Previously, she served as the Chief Financial Officer of Smokey Bones, a Sun Capital portfolio company, focused on maximizing brand value while focusing on leadership and team building. She has more than 25 years of experience in financial services including Big 4 and C-suite executive positions in national restaurant and dental organizations.

Nicole is a highly respected communicator skilled in providing technological direction, strengthening relationships and maximizing team member value, while demonstrating the ability to maintain confidentiality and impart leadership. She is an industry expert in leveraging existing and innovative new strategies to generate breakthrough business results. She has a proven track record for leading multifunctional teams to drive revenue, control costs, and improve culture while achieving profitable growth through deployment of strategic and tactical initiatives integrated with implementation of and improvement to organizational processes.

Nicole previously served as President and Chief Financial Officer of Shula's Steakhouse from 2012 to 2015. Before Shula's, Nicole spent nearly 13 years with Deloitte in various capacities including Senior Manager in the audit practice focusing in various industries including Fortune 500 public companies, consumer business, including retail and hospitality, and aerospace.

Nicole was named a 2022 Influential Business Woman, 2021 Large Company CFO of the Year and previously, 40 under 40 by the South Florida Business Journal. She was also named 2021 Power List, Most Influential People As Published in Nation's Restaurant News, 2021 FSR's Reader's Choice Awards, *Brand Innovator* and *Recognized for Excellence*. Born and raised in South Florida, she graduated with a bachelor's in business administration from the University of Miami and is a CPA. She loves the hospitality industry, and her passion is developing teams, streamlining processes, and creating brand value. In Nicole's free time, she loves spending time with her husband and three small children on the sports fields, dance stage and watching Miami Hurricane football!

Paul Shoukry, CFO
Raymond James Financial
fiCFO Advisory Board Member

Paul Shoukry is Chief Financial Officer of Raymond James Financial, Inc. (NYSE: RJF). He is responsible for the overall financial management of the company, including balance sheet management, financial reporting, investor relations, corporate development, corporate tax, cash management, regulatory reporting and financial planning and analysis. Mr. Shoukry also oversees the company's ESG strategy, initiatives and reporting. He is a member of the firm's Executive Committee and serves on the boards of subsidiaries Raymond James & Associates and TriState Capital Bank.

Mr. Shoukry joined Raymond James in 2010 to participate in the firm's Assistant to the Chairman program. He earned an MBA with honors from Columbia University. Before business school, Mr. Shoukry worked for a strategy consulting firm that focused on serving clients in the financial services industry. He started his career as a commercial banker after graduating magna cum laude with a Bachelor and Master of Accounting from The University of Georgia. Mr. Shoukry also completed the Strategic CFO Program at The Wharton School. He is a Certified Public Accountant (CPA), a Certified Treasury Professional, and a Series 7 and 27 holder. Mr. Shoukry was named to Fortune's "40 under 40 in Finance."

Mr. Shoukry enjoys golfing and spending time with his wife and three children. He is passionate about childhood education and serves on the board of trustees for Academy Prep Center of Tampa. Paul also serves on the executive cabinet for the American Heart Association's Heart Ball, and he is the executive sponsor for the firm's multicultural network.

Paula Tkac, SVP & Associate Director of Research
Federal Reserve Bank of Atlanta
Paula Tkac is a Senior Vice President and Associate Director of Research at the Federal Reserve Bank of Atlanta and a member of the Executive Leadership Committee. She leads the Economic Research and Policy function, the Regional Economic Information Network (REIN) and the Retail Payments Risk Forum in the Research Division. Tkac also serves as a senior monetary policy advisor to President Bostic and is actively involved in strategic leadership at both the Division and organizational levels.

As an economist, Tkac has conducted research on various financial market topics including the asset management industry, financial regulation, the municipal bond market and policy responses to financial crises. Her research has won two William F. Sharpe Awards from the Journal of Financial and Quantitative Analysis.

Tkac frequently speaks to private sector and community groups on issues related to monetary policy, financial regulation, and leadership. She has also appeared on C-SPAN and as an op-ed writer in the Wall Street Journal. Before she joined the Federal Reserve Bank of Atlanta in 2000, Tkac was on the faculty of the finance department at the University of Notre Dame. Tkac earned her bachelor's, master's, and doctoral degrees in economics from the University of Chicago.

Pete Mariani, EVP & CFO
Axogen
Mr. Mariani has served as Axogen's Executive Vice President and Chief Financial Officer since March 2021. He joined Axogen in March 2016 as Chief Financial Officer and brings more than 25 years of experience as a financial executive in private and public companies.

He previously served as Chief Financial Officer of Lensar, Inc, a privately held laser refractive cataract surgery company, from July 2014 through January 2016, following the sale of Lensar in December 2015. From June 2011 to June 2014, he served as Chief Financial Officer of Hansen Medical, a publicly traded medical device company developing robotic solutions for intravascular procedures. From 2007 through 2010 he served as Chief Financial Officer for two privately held companies (Harlan Laboratories: 2007 – 2009; and BMW Constructors: 2009 – 2010). From 1994 through 2006 he served in various senior financial roles with Guidant Corporation, a publicly traded leader in the development and sale of medical devices for the treatment of cardiovascular disease. Mr. Mariani began his career with Guidant as Director of Corporate Financial Reporting where he supported the initial IPO of Guidant and ultimately served as Vice President, Controller and Chief Accounting Officer. His experience at Guidant included two years as Director of Financial Reporting, Guidant Vascular Intervention in Santa Clara, California, and four years in Tokyo, Japan, mostly as Vice President Finance and Administration. While in Japan he helped to facilitate the conversion and scale of the Japan business from a distributor network to a direct sales and marketing organization. Following the 2006 sale of Guidant to Boston Scientific Corporation, he co-led the initial integration of the two companies.

From 1987 to 1994 Mr. Mariani worked with Ernst and Young, LLP, where he served a diverse client base as a Certified Public Accountant (CPA). Mr. Mariani received a B.S. degree in Accounting from Indiana University.

Peter Harper, CFO
Koozie Group
Pete Harper is the CFO of Koozie Group, a Promotional Products Company headquartered in Clearwater Florida. Prior to joining Koozie Group in 2019, Pete was the CFO for Sound United, a Home Entertainment company out of Carlsbad, California from 2016 to 2019 and before that he was the CFO of Twin-Star International, a home furnishings company located in Delray Beach Florida. Born in Northern California, Pete's career has included stints in senior financial and operational roles in public companies including GE, Iomega and CFO of Suntron International; Insurance as CFO of Scottsdale Insurance and Private Equity owned companies including the three most recent roles listed above.

Pete's passions at work include building a winning strategy with a team driven to execute to enable the business to create incredible value and build a platform for sustainable, profitable growth. Outside of work, Pete, his wife Michele and their two grown daughters enjoy traveling; they have visited over 30 countries in 5 continents, with more on the horizon.

fiCFO Florida Institute of CFOs

Peter Zeihan, President & Geopolitical Strategist
Zeihan on Geopolitics

Peter is a New York Times bestselling author whose first three books — The Accidental Superpower, The Absent Superpower and Disunited Nations — have been recommended by Mitt Romney, Fareed Zakaria and Ian Bremmer. Peter is also a highly sought after public speaker. With a keen eye toward what will drive tomorrow's headlines, his irreverent approach transforms topics that are normally dense and heavy into accessible, relevant takeaways for audiences of all types.

Peter's fourth book, The End of the World is Just the Beginning: Mapping the Collapse of Globalization, was published in June 2022 and was a New York Times bestseller.

PJ Patel, Co-CEO and Senior Managing Director
VRC

Mr. Patel is Co-CEO and senior managing director and is a member of VRC's board of directors. PJ leads the firm's financial reporting practice, the global valuation services of our international network, Valuation Research Group, in addition to other strategic growth initiatives and relationships for VRC, as the U.S.-based partner of the globally focused group.

Mr. Patel is a frequent presenter on valuation issues relating to ASC 805, ASC 350/360 and ASC 820. In addition, he has been on the Fair Value panel at the AICPA SEC Conference. He is often quoted in the press regarding valuation issues. Mr. Patel has more than 25 years of financial and valuation advisory experience focusing on financial reporting and tax assignments for public companies, private equity firms, and their portfolio companies. He has worked with well-known firms such as The Carlyle Group, Mondelez, PepsiCo, AmerisourceBergen, and Quest Diagnostics. He specializes in the valuation of business enterprises and their underlying intangible assets, including brands, trademarks, patents, customer contracts and relationships, software, and IPR&D. Mr. Patel also values businesses and IP for tax reporting and financing purposes.

Professional Affiliation Committees include Chair and active member of the Appraisal Issues Task Force (AITF), Member of the Appraisal Foundation's Business Valuation Resource Panel and Working Group (which prepared the 2016 industry Practice Aid for valuing customer-related intangible assets), Member of the LES committee preparing best practices on IP valuation, and Member of the American Society of Appraisers Business Valuation Committee.

Dr. Quintin McGrath, D.B.A., Adjunct Professor
USF Muma College of Business

Quintin McGrath is a driver of global-scale business growth and transformation with a focus on ethics, risk management, sustainability (environmental, social, and economic), and emerging technologies. As a true "global citizen," he brings an international perspective and deep cultural understanding. He grew up in South Africa and moved to the USA mid-career to build global teams serving customers worldwide. As an IT executive and a board member, he is known for advising leaders on the latest technology and its impact on organizations, most recently guiding the application of Artificial Intelligence to a business considering the ethical, governance, and leadership implications. His ability to combine risk management, sustainability, and ethics, while taking advantage of the latest global mega-tech trends makes him a sought-after transformational IT leader and advisor.

Quintin recently retired from Deloitte after 20 years of serving on Deloitte's Global CIO Council and its most senior Global Technology Executive team, guiding the $4.5b organization's worldwide Technology strategy for a $1.5b IT unit serving 40+ entities in 150+ countries. As an orchestrator of transformation and change across business units, working directly with Deloitte's Global Transformation leader, he led the conceptualization and transformation of Deloitte's IT into a shared services organization. He drove its modernization by catalyzing innovation, reinventing enterprise architecture, and driving agile delivery. Thereby enabling the effective delivery of integrated global solutions for risk management, client service, and accounting. Quintin was charged with defining Deloitte Technology's global approach to ethical technology and IT sustainability strategy. He partnered with the Global Ethics office and the Office of General Counsel on ethical technology to establish the guiding principles and practices that designed technology that benefitted both Deloitte and its global stakeholders (legislators, employees, and the community). He remains at the forefront of ethical tech with his doctorate focused on AI and ethics, in the context of Enterprise Risk Management. He established Deloitte's global IT sustainability strategy to support Deloitte Global CEO's WorldClimate program and led the "Digital with a Purpose" initiative. This initiative provided a strategy and a framework for operationalizing, measuring, monitoring, and beginning to report on the organization's sustainability efforts.

Dr. Quintin McGrath, D.B.A., Adjunct Professor (continued)
USF Muma College of Business

He is a member of the CXO Advisory Network of the A.Team start-up. This CXO Network is an invitation-only group of global industry leaders shaping the future of distributive teams and how transformative products are built. He is a member of Blumberg Capital's CIO Council, an Advisory Board for the early-stage venture capital firm. He is also a Board Member of the Society for Information Management (SIM) Tampa Bay chapter, where he leads a Shared Interest Group on the convergence of global megatrends and emerging technologies to advise national SIM leadership. Passionate about developing the next generation of ethical IT leaders, Quintin is a popular speaker and panelist for global IT leadership conferences. He is an Adjunct Professor at USF's Muma College of Business, teaching MBA and Executive MBA students.

Quintin holds a Doctor of Business Administration (D.B.A.) focused on AI, ethics, and risk management from the University of South Florida, a Master of Science in Engineering from the University of Cape Town, and a Master of Arts from Wheaton College.

Rick Cardenas, President & CEO
Darden Restaurants

Rick Cardenas became President and Chief Executive Officer of Darden Restaurants on May 30, 2022. A 34-year veteran of the company, who began his career with Darden as a busser, Rick was unanimously elected by Darden's Board of Directors in December 2021 to become the company's fourth CEO. Darden owns and operates more than 1,800 Olive Garden, LongHorn Steakhouse, Cheddar's Scratch Kitchen, Yard House, The Capital Grille, Seasons 52, Bahama Breeze and Eddie V's restaurants in North America.

Rick moved from the restaurants to Darden's restaurant support center in 1992 as an Auditor. From there, he held increasingly more responsible positions including Director of Corporate Development, Director of Finance and Technology for Seasons 52, Vice President of Finance and Assistant Controller for Olive Garden, Senior Vice President of Finance and Controller for LongHorn Steakhouse, Senior Vice President of Finance and Controller for Red Lobster, and Executive Vice President of Operations for LongHorn Steakhouse.

In July 2015, Rick became Darden's Chief Strategy Officer, then progressed to serve as Chief Financial Officer in March 2016. He returned to Operations to serve as President and Chief Operating Officer in January 2021 before being promoted to his current role. While CFO at Darden, Rick served as a member of fiCFO's Advisory Board.

Rick briefly left the company in 1998 to work for management consulting firms Bain & Company and the Parthenon Group. Rick graduated summa cum laude from the University of Central Florida with a bachelor's degree in Finance & Accounting. He earned an MBA from The Amos Tuck School of Business Administration at Dartmouth College and is a Certified Public Accountant. He currently serves as a member of the board of directors of Tractor Supply Company.

Robert Riesenberg, CFO
EBG

Robert Riesenberg is the Chief Financial Officer for EBG and served in that capacity for 13 years. He brings years of experience in finance, accounting, and marketing, and is also a Certified Public Accountant. In his current capacity, Robert is responsible for managing the Finance & Accounting, Risk Management, Legal and Human Resources departments.

Prior to EBG, Robert served as the Director of Finance for what is now Hard Rock Stadium and the Miami Dolphins. In addition, he provided assurance services for both public and private entities with Rachlin Cohen & Holtz (now Marcum). Before becoming a CPA, he enjoyed a career in marketing and as a small business owner spanning more than 10 years.

Robert received a bachelor's degree from The Ohio State University and holds masters' degrees from St. Thomas University and Nova Southeastern University.

Russ Tiejema, EVP & CFO
Masonite International
fiCFO Advisory Board Member
Russ Tiejema serves as Executive Vice President & Chief Financial Officer of Masonite International, a leading global designer and manufacturer of residential and commercial door systems and related components, based in Tampa, Florida.

Prior to being named CFO at Masonite in November 2015, Russ served as the Chief Financial Officer for LII Residential, the largest reporting segment of Lennox International, a global provider of climate control solutions based in Dallas, Texas. Russ joined Lennox in 2013 as Vice President, Corporate Business Analysis & Planning following twenty years with General Motors, during which he held a variety of leadership roles including Finance Director for GM Fleet & Commercial and Director of Financial Planning and Analysis, where he was a member of the team that planned the company's operational restructuring in 2009.

Russ holds a Bachelor of Science in Management from Kettering University (formerly General Motors Institute) and an MBA in Finance from the Kelley School of Business at Indiana University, where he attended as a GM Fellow.

Scott Haralson, EVP & CFO
Spirit Airlines
Scott Haralson is the current Executive Vice President & Chief Financial Officer for Spirit Airlines where he is responsible for finance, treasury, accounting, tax, data analytics, real estate, and investor relations. Scott joined Spirit in 2012 as the Vice President of Financial Planning and Analysis (FP&A). In 2017, he took over the real estate function in addition to his Finance duties. In October of 2018, he took over the CFO role.

Scott started his career in Corporate Banking working primarily on structured finance deals then quickly headed for the airlines. He cut his teeth in the airline business at America West Airlines (and what would become US Airways). He has also held financial management positions with Frontier Airlines, Swift Aviation, and Dish Network.

Scott has worked through many of the most influential aviation finance issues of the past 20 years. He has worked through the post September 11th ATSB government-backed loan process, financial restructurings, acquisitions, bankruptcies, hyper-growth in the ULCC space, Covid pandemic fallout and now a unique merger with JetBlue Airways.

Scott received his MBA in Finance from the University of Mississippi, graduating with honors.

Sean Pelkey, EVP & CFO
CSX
Sean Pelkey is Executive Vice President and Chief Financial Officer, leading planning and implementation of all finance activities at CSX, as well as overseeing the company's real estate assets. He was named Acting Vice President and Chief Financial Officer in June 2021 after serving as Vice President and Treasurer since 2017.

After joining CSX in 2005, Pelkey held a variety of finance management roles, including assistant vice president of capital markets, as well as several director and managerial roles in investor relations, performance analysis, financial planning and IT finance. He holds an MBA in finance from the University of Florida Warrington School of Business, and a bachelor's degree from Boston University. He also completed CSX's Executive Development Program at Harvard Business School.

Simon Gregorich, CFO
PODS
Simon Gregorich has been with PODS since January 2005 and currently holds the position of SVP, Chief Financial Officer. Prior to PODS, he was the VP of Finance for O'Reilly Automotive, Inc., a publicly traded automotive retailer. He also worked for Quality Distribution, Inc., a publicly traded trucking company, as their VP and Controller, and was the Controller for Discount Auto Parts, Inc. Simon began his financial career at Deloitte & Touche. Simon previously served as a fiCFO Advisory Board Member.

Tim Moss, Chairman and CEO
Talkmap
Tim has over 30 years of experience in executive-level positions in the technology and financial services industries at Fortune 100 scale as well as a half dozen successful entrepreneurial ventures. He serves as Founder and CEO of IMG Venture Group and leads the growth and development of rising companies. Before founding IMG, as COO he led the turn-around for Syniverse, an $800M+ global Carlyle company. Prior to Syniverse, as Senior Vice President at Ericsson, Tim led the launch of a new organization responsible for the development of new strategy, products, multiple acquisitions and sales channels. IMG originated with his first consulting company Integrity Management Group (IMG) which was founded in 2001 and supported start-ups and larger enterprise clients for 10 successful years.

Todd Goodman, CFO
AdventHealth Florida
Todd Goodman is Chief Financial Officer of AdventHealth's Florida Division which includes 29 hospital facilities and dozens of outpatient facilities. Todd has worked in health care for more than 30 years and oversees the financial operations of one of the largest nonprofit health care systems in the country, with a net annual revenue of more than $11 billion.

Under Todd's leadership, AdventHealth is implementing strategies that strengthen and advance the organization, including rapidly expanding the outpatient network, transforming the enterprise resource system, developing a high-performing clinically integrated network, lowering the cost of care, and improving the affordability of health care in our community, and developing a high-performing clinically integrated network.

During Todd's tenure serving in senior finance leadership positions with AdventHealth (formerly Florida Hospital), the organization has experienced significant growth, including the opening of multiple locations such as Women's and Children's hospitals, expanded research through programs such as the Translational Research Institute for Metabolism and Diabetes, and made several acquisitions to help expand AdventHealth's services to the community across the state of Florida.

Prior to his current role, Todd served in positions including CFO, Senior Finance Officer/Senior Vice President of AdventHealth's eight-campus Central Florida Division, and Chief Financial Officer of the organization's Heartland division.

Todd is passionate about helping people achieve their greatest health and is committed to a whole-person health philosophy that places equal importance on healing the body, mind, and spirit.

He sits on several boards, including AdventHealth's Community Health Impact Council, the finance committee of the Florida Conference of Seventh-day Adventists, Adventist University of Health Sciences and Southwestern Adventist University, as well as the Heart of Florida United Way Community Investment Committee.

Tony Terry, EVP & CFO
Marriott Vacations Worldwide Corporation
Since October 2021 Tony Terry has served as Executive Vice President and Chief Financial Officer for Marriott Vacations Worldwide Corporation (NYSE: VAC), a leading global vacation company that offers vacation ownership, exchange, rental and resort and property management, along with related businesses, products and services. The company has over 120 vacation ownership resorts around the world and approximately 700,000 owner families in a diverse portfolio that includes some of the most iconic vacation ownership brands.

Mr. Terry leads the global finance and accounting organization while partnering with MVW's business executives to provide financial support and a strategic perspective to drive the overall financial results of the company. He also oversees the development and feasibility functions for the company. Mr. Terry works with the strategic council to develop financial and operational business strategies that maximize profitability and growth for the company.

Mr. Terry joined Marriott Vacation Club International (MVCI) in October 1996 as a manager, financial accounting, and was quickly promoted to senior manager, financial accounting. He then moved to director of new product development/brand management, where he helped launch the Horizons brand among other initiatives. The MVCI Executive Committee then selected Mr. Terry to serve as a technical process owner in support of transforming MVCI to a process-centric organization, where he defined the organizational construct and processes for product supply management (PSM). Thereafter, Mr. Terry moved into the role of vice president, PSM with responsibility for analyzing and optimizing the use of the company's inventory and leading PSM's business planning efforts. In July 2005, Mr. Terry moved back into the F&A

Tony Terry, EVP & CFO (continued)
Marriott Vacations Worldwide Corporation

organization as senior vice president, global operational finance, where he served as the financial business partner for the Vacation Ownership segment, leading the F&A efforts for marketing & sales, development, operations, rentals and international accounting. Mr. Terry has more than 26 years with MVW and extensive experience in strategic planning, organizational optimization, and financial analysis. Prior to MVW, Mr. Terry worked as a senior auditor at the Walt Disney Company in Orlando and an audit senior at Arthur Anderson LLP in Tampa.

Mr. Terry holds a Bachelor of Science degree in Accounting from Florida State University. He has attended the Wharton Business School Executive Development Program, Marriott International Lodging Leadership and Executive Education Program, and the Dr. Michael Hammer Reengineering Certification Program. He has previously served on the Board of Directors for INROADS of Central Florida, the Jason Beaird Memorial Foundation and the City of Orlando Audit Board (serving his last year there as Chairman). He currently serves on the Advisory Committee for the Department of Finance at the University of Central Florida. He is married and has three children, TJ (26), Kendal (23) and Aria (18).

Tracie Ahern, CFO
PineBridge Investments

Ms. Ahern is Chief Financial Officer for PineBridge Investments responsible for planning, auditing, accounting for, controlling and reporting on the firm's finances. Ms. Ahern is also responsible for overseeing the firm's risk governance structure, including setting risk parameters to meet internal and regulatory risk reporting guidelines for PineBridge's global locations.

She has over 30 years in the investment management industry, including 10 years of CFO experience with alternative and long only funds. Most recently Ms. Ahern served as an Independent Trustee for the Advisor Inner Circle Trust, a $60 Billion 1940 Investment Trust, as well as an independent director on various alternative funds. Ms. Ahern served as the CFO for Soros Fund Management from 2007-2015, where she managed the Treasury, Operations, Fund Administration and Management Company finances, chaired the Valuation Committee and was a member of the Management, Capital Allocation and Risk, Brokerage and Retirement Committees. Prior to that role, she was Vice President of Capital Markets Accounting for Freddie Mac, and also held senior positions at Lord, Abbett & Co., Deutsche Bank and Goldman Sachs Asset Management.

Ms. Ahern is a CPA and received an MBA in Finance and International Business from the Stern School of Business at New York University and a BS in Accounting from Manhattan College.

Tyler Sipprelle, Partner
Siris Capital

Mr. Sipprelle joined Siris in 2016 and serves on the Investment Team with responsibility for sourcing, executing, and managing investments with a focus on transactions in the business services, internet, telecom services, and industrial technology sectors.

Prior to joining the Firm, Mr. Sipprelle graduated from Harvard Business School as a Baker Scholar. He previously worked as at technology-focused buyout fund Vector Capital and in the Technology Investment Banking Group at Lazard.

Portfolio Companies
- Newfold Digital
- Electronics for Imaging
- Constant Contact
- Intralinks (Realized)
- TNS (Realized)

Education
- Harvard Business School, M.B.A.
- Harvard University, A.B