

Chapter Membership Benefits

Financial Executives International (“FEI”) is the leading professional association for senior financial executives, representing over 10,000 leaders nationwide. Membership-driven, FEI provides peer networking opportunities, personal and professional development, insights on emerging issues, and advocacy resources that advance the success of FEI members, their companies, and the profession.

FEI members include Chief Financial Officers, Controllers, Accounting and Finance Directors, Treasurers, Tax Executives, Internal Audit Leaders, other finance executives, and others, including members of academia and government. FEI delivers value through its 55+ chapters, national technical committees, and a robust portfolio of services provided by the FEI national office.

Membership in the **FEI San Francisco Bay Area (“FEI SFBA”)** chapter provides many **local benefits** as well as **access to national FEI resources**. At its core, FEI SFBA is a community – and we are intentional about building it. Members don't just attend events; they develop lasting connections with fellow CFOs, finance leaders, strategic partners, speakers, and other members of our community who share their commitment to professional growth and meaningful relationships.



FEI SFBA Background

The FEI SFBA chapter serves senior finance executives in the greater San Francisco, East Bay, just south of SF, and North Bay regions. Members share best practices, exchange insights on emerging issues, and build connections through year-round programs – many offering CPE credits.

The chapter’s membership includes many seasoned CFOs and financial leaders from a wide variety of industries – with the largest representations related to technology, consulting, financial services, healthcare, food and beverage, and pharmaceuticals/medical devices.



AI Strategy and Programming

AI has been an intentional strategic focus for the chapter since Fall 2025. Rather than treating AI as a single topic, we've built a multi-format programming arc designed to take members from foundational awareness through hands-on application and ecosystem intelligence – continuing to evolve to address relevant strategic leadership issues.

This has included an interactive *AI Tools for Everyday Work* workshop, the launch of our AI Finance Affinity Group, and an ongoing speaker series on real-world AI in finance. A flagship element of this programming is the AI Finance Systems Expo – a twice-yearly program. The Expo is a unique, interactive "speed-dating" demo experience where finance leaders meet in small groups with AI solution providers for focused, hands-on conversations. We are also planning a new, recurring, interactive virtual series – “Ask Me Anything” for candid conversations on AI topics – in conjunction with our AI Finance Affinity Group.

The chapter’s AI Finance Steering Committee guides the direction of this programming, ensuring it remains relevant, practical, and forward-looking for finance leaders. Our AI programs include both in-person and virtual events.



In-Person Events

FEI SFBA targets holding approximately **two in-person events per month** during our program year, offering opportunities for education, networking, and thought leadership. Further details on our different in-person events are below.

1. Local Pods Program

FEI SFBA's **Local Pods** program brings in-person networking closer to our members' homes and/or offices. The program established a "pod" in four different regions where our members live: San Francisco, the East Bay, the North Bay, and just south of SF.

In each pod's region, local get-togethers are organized every several months (happy hours, etc.) which enable more intimate networking in locations convenient to members. Attendance at our social Pod events is not just limited to members in each region; members from other regions are welcome and encouraged to join other regions' events (e.g., a member living in the North Bay can attend a Pod event in SF).

2. Programs with Speakers/Panels

Memorable recent speakers* have included:

- Jeffrey Korzenik – Chief Economist of Fifth Third Commercial Bank
- Scott Anderson – Chief U.S. Economist, BMO Capital Markets
- Erika Bahr – Founder & CEO, Daxe
- Andrew Boston – Partner, Founders Circle Capital
- Josh Constine – Venture Partner, Signal Fire
- Julia Holian – Principal, Career Transformation Partners
- Kevin Bumen – Chief Financial and Commercial Officer, San Francisco International Airport
- Colin Yasukochi – Executive Director, CBRE's Tech Insights Center
- Mark Zandi – Chief Economist, Moody's Analytics
- Jay Hanson – Board Member, PCAOB
- Robynne Sisco – President and CFO, Workday
- Aswath Damodaran – Professor of Finance, NYU; author and frequent guest on CNBC on valuation issues

Please see [this link](#) for a summary of highlights related to our recent in-person events.



Virtual Events & Initiatives

The chapter also organizes a variety of virtual webinars and meetings during the year. Recent events have included our **yearly December tax update**, the **Dream Career series** (including two sessions: (i) *Creating Your Business Plan and (ii) Branding and Your Story*), **Navigating the Banking Crisis series** (including *Who Will Replace Silicon Valley Bank? The Evolving Venture Debt Ecosystem*), the outlook for the Bay Area Commercial Real Estate Market, and *Maximizing Value from LinkedIn*.

In addition to our topical series events, memorable recent speakers* have included:

- Sowmya Ranganathan – Co-Founder and CEO of Lumera; former Controller of OpenAI and Rippling
- Jennifer Cabalquinto – Special Advisor and former CFO of the Golden State Warriors
- Jim Cook – CFO of Orbital Insight; part of the founding teams of Mozilla and Netflix
- Brian McGee – CFO and COO of GoPro
- Sandra Clarke – CFO of Blue Shield of California
- Jennifer Ceran – former CFO at Smartsheet and former Finance Leader at Box, eBay, and Cisco; member of five boards



CFO Bootcamp

The CFO Bootcamp program is designed for senior finance professionals whose next career step is CFO, or current CFOs who want to strengthen their strategic and leadership skills.

The CFO Bootcamp program was awarded the **FEI Innovation Award** – which recognized one FEI chapter for an initiative which demonstrated creativity and out-of-the-box thinking.

FEI SFBA holds two virtual Bootcamp sessions each year, with the following sessions:

Fall Bootcamp (October & November)

CFO and the Law
Financial Management
Strategic Planning and FP&A
Fundraising and Capital Structure
(Equity Session and Debt Session)
Managing Talent

Spring Bootcamp (April & May)

Leading Change through Effective Company Culture & Communications
The CFO's Contribution to Good Governance
The Role of the CFO in Risk Management
The CFO Systems and Technology Roadmap
Becoming a CFO: Real Career Journeys, Pivotal Moments,
and What Matters Most

The Spring 2026 CFO Bootcamp, held in April and May, was the 12th cohort of the Bootcamp program. The Spring 2026 and recent Bootcamp cohorts have included between 40 and 45 participating senior executives. See [this link](#) for the flyer associated with the Spring Bootcamp.

Each session does a deep-dive on each topic as part of a three-hour session – which includes a combination of presentations, panel discussions, and a collaboration activity (e.g., a breakout group discussion or case study).

Participants consistently cite the quality of their fellow cohort members and the relationships built across sessions as a highlight of the program – creating a peer network that extends well beyond the Bootcamp itself.



Other FEI SFBA Chapter Programs

- **Affinity Groups and Mastermind Groups** – These groups are focused on specific industry sectors or areas of common interest. Each group is facilitated by chapter moderators – with meetings designed to encourage the exchange of ideas, best practices, and brainstorming discussions among peers.
 - **AI Finance Affinity Group.** As noted on page 1, the chapter launched this group in Fall 2025. Recent virtual affinity group sessions have included *From Demo to Practice* led by Sowmya Ranganathan from Lumera and *The State of AI in Finance* led by Anna Tiomina, AI-native CFO and Founder of Blend2Balance.
 - **Women's Affinity Group.** This group hosts both in-person and virtual programs. Recent in-person events have included *Steps, Stories & Sips* – a gathering at Salesforce Park combining a guided walk, a discussion on the book *Radical Candor*, and a happy hour – and *The Confident Voice: Speak Up, Stand Out & Lead with Impact*.
- **Career Services Group** – The chapter's Career Services Group supports finance and accounting executives who are interested in finding a new position which fits their personal values and overall professional purpose.

The Career Services Group is a trusted peer community which provides practical resources, shared job leads, and the support of colleagues who understand the unique challenges of executive-level career searches.

To support those who are looking for the ideal position, the Career Services Group meets once a month (normally the 1st Wednesday of each month at 9am PT) – with some sessions including speakers and other sessions focused on an open forum format to share leads and insights. As a part of the job search process, networking and outreach are important – we provide a number of recommendations which help to expand the networks of the group's members.



Other

The FEI SFBA chapter collaborates with other local organizations (e.g., the CFA Society of San Francisco, How Women Lead, 100 Women in Finance) – which provides our members with access to other events, as well as the ability to network with senior executives from other groups.



National FEI Benefits and Programs

FEI's national organization also provides a variety of benefits for members, including, but not limited to, the following:

- **Webinars** – FEI provides complimentary webinars with topics which range from general finance to specific industry issues covering emerging trends, regulatory and standards developments, as well as leadership skills and career management skills. Most webinars offer opportunities to earn CPE credits.
- **FEIconnect** – FEIconnect is a members-only, online community which allows members to interact from around the world, wherever and whenever they need. The community forum allows members to participate in focused discussion threads, access informative document libraries, network via a comprehensive member directory, and share files/post questions online.
- **FEI Weekly** – Every week, FEI Weekly provides readers with breaking news, analysis of industry and regulatory trends, and features that keep members up-to-date and informed.



Key Links and References

References to chapter resources and links include:


- **Events**

The links below include information on our upcoming events and recent event highlights:

 [Summary of Upcoming Events \(continuously updated\)](#) (pdf). This registration page for events is [here](#).

 [Recent Event Highlights](#)

- **Background Information**

 The chapter's [home page](#) has background on the chapter and links to additional information in blue text in the middle of the page (including our most recent CFO Bootcamp flyers, membership applications, CPE credit information, etc.).

- **LinkedIn**

 Follow the chapter's [LinkedIn page](#) to stay updated on our events, programs, and initiatives.



FEI Membership Structure and Fees

- FEI membership includes two components: **National** and **Chapter**:
 - The **National** fee (**\$309**) provides access to webinars, thought leadership, professional development programs, and FEIconnect (FEI's national online community).
 - The **Chapter** fee supports chapter-specific programs and events. Chapter membership is required, and fees vary by location/chapter. For FEI SF Bay Area, the chapter fees relate to our in-person events (both speaker/panel programs and Local Pod/networking socials), chapter affinity groups, the lowest available participant fee for the CFO Bootcamp program, and all other chapter initiatives described above. FEI SFBA chapter fees are **\$315** for Professional Members and **\$115**** for In-Transition Members.
- Based on the above, total FEI SFBA membership fees are **\$624 for Professional Members** (\$309 + \$315) and **\$424 for In-Transition Members** (\$309 + \$115).
- Together, FEI National fees plus Chapter fees associated with membership provide both nationwide insights and local resources/connections that help financial leaders learn, grow, connect, and succeed.

** In-Transition fees were reduced by \$100 in June 2025.

Thank You to FEI SFBA's Current Strategic Partners:

