

VIRTUAL PROGRAM



Spring 2026 CFO Bootcamp

FEI San Francisco Bay Area is pleased to sponsor our virtual **Spring 2026 CFO Bootcamp**, featuring **five sessions in April and May 2026**. Now in its 12th cohort, the Spring 2026 Bootcamp is designed to complement our Fall Bootcamp held in October and November.¹

The CFO Bootcamp program is tailored for senior finance and accounting professionals preparing for the CFO role, as well as current CFOs seeking to sharpen their strategic and leadership skills. The program was recognized with FEI's 2018-2019 Innovation Award – which honored one FEI chapter for an initiative demonstrating creativity and out-of-the-box thinking. Recent CFO Bootcamp cohorts have included approximately 40 to 45 senior executives.

The Spring 2026 CFO Bootcamp includes five sessions covering (i) **Leading Change through Effective Company Culture and Communications**, (ii) **The CFO Systems and Technology Roadmap**, (iii) **The CFO's Contribution to Good Governance**, (iv) **The Role of the CFO in Risk Management**, and (v) **Becoming a CFO: Real Career Journeys, Pivotal Moments, and What Matters Most**. Together, these sessions provide a comprehensive foundation for finance leaders navigating today's complex business and financial environment.

Virtual sessions will be held on Tuesday, April 21, and then successive Wednesday afternoons/evenings from April 29 through May 20. Each session runs from 4pm to 7pm PT, and time for networking will take place before each session. The program also includes an in-person social event in San Francisco in June.

Each session will feature expert presenters and panelists, including an **Executive in Residence** who will provide mentorship and share perspectives and real-world experiences. In addition, every session will include a collaboration activity with time for scenario sharing, problem solving, and interaction with fellow Bootcamp attendees. Attendees will also have access to recordings and all presentation/reference materials from each session through a dedicated Bootcamp website, providing an ongoing resource beyond the live program.

Please see pages 3 to 7 for further details on each session.

Bootcamp application QR code:

SPACE IS LIMITED – Applications are reviewed on a rolling basis and early submission is encouraged. See the QR code for the Bootcamp application. Please contact Dolores Dumas-Aris at chapter.admin@fei-sfba.org with any questions. **Final application deadline: 4/20/2026 by 9:00AM PT**



or visit:
[Spring CFO Bootcamp application link](#)

¹ The next Fall Bootcamp will be held in October/November 2026 and will include six sessions (i) CFO and the Law; (ii) Financial Management; (iii) Strategic Planning and FP&A; (iv) Fundraising and Capital Structure (two sessions – equity-focused and debt-focused); and (v) Managing Talent. **Note that attending a prior Fall Bootcamp is not required to attend the Spring 2026 CFO Bootcamp.**

Dates and Times: Please see pages 3 to 7 for session dates and times.

Format: Interactive virtual meetings

Investment & Early Bird Discount:

Early bird deadline – Submit your application by **4/3/2026** and complete payment by **4/7/2026** to secure the reduced rates below.

- FEI SFBA Members & All In-Transition: \$179 Early Bird (\$199 Standard)
- Members of other FEI Chapters: \$369 Early Bird (\$399 Standard)
- Non-Members: \$449 Early Bird (\$499 Standard)

Bootcamp fees can be applied toward **FEI SFBA membership**, providing immediate ROI on your Bootcamp investment. Further details on the application of these fees to your membership tier will be provided during Bootcamp.

CPE credits: 17.0 CPE credits

What Participants Say About the CFO Bootcamp

- “ The CFO Bootcamp was terrific! I thought all of the **guest speakers and panels were excellent** and all of the topics for discussion were **spot on**.
- “ **Brilliant course**. I really enjoyed it. Thank you to everyone who facilitated and **made the magic happen!**
- “ **Excellent content and interactive format!** I found it **highly valuable**, and I am excited to apply the insights I gained. It was a pleasure interacting in virtual workshops with such an **inspiring group of finance leaders**.
- “ The sessions and material were all **very well organized and presented**. Really impressed with the **quality of the presenters and their presentation materials**.
- “ The FEI SF Bay Area CFO Bootcamp was a **unique opportunity to interact on a peer-to-peer level ...** 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. The Bootcamp is structured with timely topics to sharpen your existing skills with top notch discussion leaders in an open forum setting that offers **valuable takeaways as well as continuous networking** throughout the program.
- “ I enjoyed **the camaraderie of fellow ‘classmates’** and found the content to be on-point. Especially helpful was the insight from the industry practitioners. The Bootcamp gave a **comprehensive snapshot of a CFO’s life** and identified developmental needs.
- “ Great format to **hear from people who have traveled the path** and hear their stories and insights in terms of **how to be successful getting and staying there!**
- “ The CFO Bootcamp is a **great way to meet other finance executives** and to discuss the many hats worn by a CFO. The wide range of experiences of speakers and attendees led to insightful discussions, and the virtual format made it easy to participate. Both enjoyable and enlightening. **Highly recommend!**
- “ I **absolutely loved the CFO Bootcamp**, I thought it was organized so well with some **truly phenomenal panelists**. I was very happy to be a part of it and **learn from some of the best!**

Please see pages 3 to 7 for details on the five Spring Bootcamp sessions.



Program Schedule

I: Leading Change through Effective Company Culture and Communications

Apr 21: 4pm – 7pm PT
Networking from 3:30pm – 4pm PT

3.5 CPE credits (Business Management & Organization)

As organizations navigate rapid change – including growth, transformation, and periods of uncertainty – CFOs are increasingly expected to play a visible leadership role beyond traditional financial oversight. In addition to managing financial performance, today's CFO must help shape organizational culture, communicate strategic priorities, and align teams across the enterprise.

Because the CFO often oversees or works closely with multiple functions – including finance, operations, human resources, IT, and other business units – the role frequently serves as a bridge between leadership teams, employees, boards, and investors. As a result, the ability to communicate clearly, build trust, and reinforce accountability across diverse groups is essential to the CFO's effectiveness.

This session will explore practical approaches for CFOs to influence and strengthen company culture while communicating effectively across a variety of settings. Panelists will share real-world perspectives on partnering with CEOs and other C-suite leaders, reinforcing organizational values during periods of change, and navigating difficult conversations with credibility and transparency. We will also discuss how emerging technologies – including AI – are beginning to reshape communication, information flow, and decision-making across organizations.

Participants will leave with concrete strategies for strengthening culture, communicating across stakeholders, and positioning themselves as enterprise leaders amid ongoing organizational and technological change.

Collaboration activity: breakout group discussion

Instructors:

- *Speaker: Darcy Illg – former CFO at Ramsell Corporation and Contech, Inc.; Lecturer and Member of Professional Faculty at the Haas School of Business, University of California, Berkeley*
- *Speaker: Matt Svetich – Managing Director and San Francisco Bay Area Market Leader, Riveron*
- *Panelist: John Nadaskay – CFO, Coreshell Technologies*
- *Panelist: Mark Thorpe, CPA – Interim and Fractional CFO for Venture-Backed and High-Growth Companies; former CFO at Eargo, Inc. and Toku (interim)*



Program Schedule

II: The CFO Systems and Technology Roadmap

Apr 29: 4pm – 7pm PT
Networking from 3:30pm – 4pm PT

3.5 CPE credits
(Information Technology)

CFOs are increasingly responsible for defining the financial systems and data architecture that enable growth, visibility, and control. From core ERP and financial reporting systems to planning, reporting, and analytics platforms, technology decisions have long-term implications for scalability, risk management, and decision-making.

This session will focus on how CFOs evaluate, prioritize, and sequence systems investments across the finance organization. We will explore best practices for building a finance technology roadmap, partnering effectively with IT, and avoiding common pitfalls such as over-customization or premature implementation. The discussion will also highlight how AI is transforming finance systems – from automating transactional processes to enhancing forecasting, anomaly detection, and decision support – and how CFOs can balance innovation with governance, data integrity, and change management.

This session is designed to help CFOs make smarter, more intentional technology decisions that support both near-term needs and long-term strategy.

Collaboration activity: case studies with breakout groups

Instructors:

- *Moderator/Executive in Residence/Speaker: Glenn Snyder – Senior Director, Interim Management at Riveron; former VP of FP&A at Vacasa, Mobileum, Zazzle, and Digital Realty*
- *Panelist: Chris Clay – Senior Director, Global Center of Excellence at SAP*
- *Panelist: Damon Kade – Senior Managing Director of Business Process Development, Riveron*
- *Panelist: James Myers – CEO & Founder, FP&A Strategy Consulting*



Program Schedule

III: The CFO's Contribution to Good Governance

May 6: 4pm – 7pm PT*

Networking from 3:30pm – 4pm PT

3.5 CPE credits (Business Management & Organization)

Strong corporate governance is essential to maintaining trust with shareholders, regulators, employees, and other stakeholders. As expectations for transparency, accountability, and oversight continue to evolve, CFOs play a central role in helping organizations establish and maintain effective governance frameworks.

Because the CFO sits at the intersection of financial reporting, risk management, and executive leadership, the role is often closely connected to board interactions and governance processes. CFOs must understand not only the mechanics of governance, but also how evolving regulatory expectations, investor priorities, and emerging topics – including AI – are shaping governance discussions in the boardroom.

This session will explore the fundamentals of effective corporate governance and the CFO's role in supporting strong oversight and decision-making. Panelists will discuss key governance principles, recent trends influencing board composition and responsibilities, and how CFOs can effectively engage with boards and governance committees. We will also touch on emerging governance considerations, including oversight of AI.

Participants will leave better equipped to navigate governance responsibilities, engage productively with boards, and strengthen governance practices within their organizations.

Collaboration activity: case studies with breakout groups

Instructors:

- *Session Moderator and Speaker: Donna Hamlin – Founder & CEO, Boardwise, Inc.; Lead Partner, CHROs2GO*
- *Panel Moderator: Josette Ferrer – Managing Director, Clairant Advisors; FEI SF Bay Area President*
- *Panelist: Nola Masterson – Recent Board Director of Pacylex Pharmaceuticals, Inc. and ZIVO Biosciences, Inc.; Partner, Boardwise; Co-Chair, Women Corporate Directors Foundation; Board of Advisors, Astia and Lake8*
- *Panelist: Marilyn Nagel – Co-Founder & Chief Strategy Officer, Rise Results; CEO, Ready-Aim-Aspire*
- *Other panelists to be announced, including experienced board members*



Program Schedule

IV: The Role of the CFO in Risk Management

May 13: 4pm – 7pm PT*
Networking from 3:30pm – 4pm PT

3.5 CPE credits (Business Management & Organization)

As organizations face an increasingly complex risk landscape – including cyber threats, regulatory scrutiny, operational disruptions, and geopolitical uncertainty – CFOs are often on the front line of identifying, assessing, and managing enterprise risks. Beyond their fiduciary responsibilities, today's CFO must balance risk mitigation with strategic decision-making, helping organizations protect value while still pursuing growth opportunities.

Because the finance function has visibility across many areas of the business, CFOs play a central role in coordinating risk management efforts across departments and ensuring that risks are understood, monitored, and addressed proactively. This includes working closely with executive leadership, boards, and external advisors to develop effective governance frameworks and response strategies.

This session will explore practical approaches to enterprise risk management and how CFOs can strengthen their organizations' ability to anticipate and respond to evolving threats. Panelists will discuss how risk priorities may shift over a company's lifecycle, review key exposures such as cyber risk and Directors and Officers (D&O) liability, and examine how insurance strategies can help mitigate risk while supporting long-term business resilience and growth.

Participants will leave with a clearer understanding of how to evaluate risk exposures, strengthen governance structures, and implement strategies to better protect their organizations.

Collaboration activity: breakout group discussion

Instructors:

- *Moderator: Rick Craig – Director, Corporate Risk & Broking, Willis Towers Watson Insurance Services*
- *Panelist: Sam Maheshwari – CFO, Varex Imaging (Nasdaq: VREX)*
- *Panelist: Rachel Buerger – Director and West Region FINEX Leader, Willis Towers Watson Insurance Services*
- *Panelist: Becky Pearson – Chief Strategy Officer, FINEX NA Cyber and E&O, Willis Towers Watson Insurance Services*



* Updated 3/12/2026: Sessions III and IV dates swapped

Program Schedule

V: Becoming a CFO: Real Career Journeys, Pivotal Moments, and What Matters Most

May 20: 4pm – 6:30pm PT**

3.0 CPE credits

**Note the earlier end time for this session (Personal Development)

Networking from 3:30pm – 4pm PT

Every CFO got there differently. Some came up through accounting or FP&A, others through operations, investment banking, consulting, or other leadership roles. What they share is a set of experiences, relationships, and hard-won lessons that shaped how they lead – and this session is designed to surface those lessons directly.

Featuring an in-depth panel of experienced CFOs, the discussion will explore how they positioned themselves for the role, which experiences proved most valuable in their development, and what they wish they had known earlier in their careers. Panelists will also address how the CFO role itself continues to expand – as organizations increasingly look to finance leaders to serve as strategic partners to the CEO and broader executive team – and what this means for how aspiring and current CFOs should be thinking about their development.

The session will also connect themes explored throughout the Spring Bootcamp – including leading organizational change and culture, developing a systems and technology roadmap, managing enterprise risk, and supporting strong governance practices. Panelists will share how these areas come together in practice and how CFOs navigate the broad set of responsibilities the role demands. This integrative discussion is designed to help participants leave the program not just with new knowledge, but with a clearer sense of the path ahead.

Collaboration activity: breakout groups with CFO panelists

Instructors:

- *Moderator: Surbhi Pir – Vice President of Enterprise Accounts, Robert Half*
- *Panelist: David Cooper – CFO, Renew Home*
- *Panelist: Kathy DeVillers – CFO, Cakebread Cellars*
- *Panelist: Joy Mbanugo, J.D., MAcc. – CFO, CXApp, Inc. (Nasdaq: CXAI)*
- *Panelist: Thomas Negrel – Interim CFO, Mezzetta*
- *Panelist: Trisha Niemuth – Chief Administrative & Financial Officer, Telecare Corporation*

In-Person Event in San Francisco Summer Social & Spring 2026 CFO Bootcamp Celebration

June 16: 5:30pm – 8pm PT

Sens (4 Embarcadero Center) in San Francisco

Join FEI SF Bay Area members and partners for a combined Summer Social and Spring 2026 CFO Bootcamp celebration as we wrap up the cohort and kick off the summer together!

Enjoy an evening of connection and conversation – featuring great company, relaxed networking, and delicious food and drinks.



Other Program Information



Participants in prior CFO Bootcamps have included senior professionals from*:

Alumis (Nasdaq:ALMS)	CSE Insurance	Mitsubishi UFJ Financial Group (TSE:8306)
Alphabet (Nasdaq:GOOGL)	Dave & Buster's	The Myers-Briggs Company
Annaly Capital Management (NYSE:NLY)	eBay (Nasdaq:EBAY)	Nokia Corporation
Apple (Nasdaq:AAPL)	Fandom	One Medical (Nasdaq:ONEM)
Autodesk (Nasdaq:ADSK)	Gensler	Owens Corning (NYSE:OC)
BlackLine (Nasdaq:BL)	Grocery Outlet (Nasdaq:GO)	PageBites
Blue Shield of California	Hanson Bridgett, LLP	Plaid
California Bank of Commerce	Jam City	RingCentral (NYSE:RNG)
Chevron Corporation (NYSE:CVX)	Marin Software (Nasdaq:MRIN)	Roku (Nasdaq:ROKU)
Corsair Gaming (Nasdaq:CRSR)	Medtronic (NYSE:MDT)	ServiceNow (NYSE:NOW)
Coupa Software	Metromile (Nasdaq:MILE)	Uber Technologies (NYSE:UBER)
Cowbell Cyber	Mitek Systems (Nasdaq:MITK)	Zscaler (Nasdaq:ZS)

Prior CFO Bootcamp instructors have included executives from*:

Advanced Micro Devices (Nasdaq:AMD)	FLG Partners	Narvar	ServiceRocket
Airbnb (Nasdaq:ABNB)	Fox Rothschild LLP	OpenAI	Sharethrough
Anaplan, Inc.	GitLab (Nasdaq:GTLB)	Ouster (NYSE:OUST)	Silver Spring Networks (NYSE:SSNI)
Aon (NYSE:AON)	Graybug Vision. (Nasdaq:GRAY)	Planet Labs	Smartsheet (NYSE:SMAR)
Baker Tilly	Hero Digital	Playground Global	Udemy (Nasdaq:UDMY)
California Olive Ranch	Hornblower Cruises & Events	Planful	Wells Fargo & Company (NYSE:WFC)
CFOs2GO	HotelTonight	Protiviti	WEX (NYSE:WEX)
CommonSpirit Health	JPMorgan Chase & Co (NYSE:JPM)	Precanto	Wind River Software
CXApp Inc. (NASDAQ:CXAI)	Life Storage (NYSE:LSI)	Ripple Foods	Vacasa (Nasdaq:VCSA)
DocuSign (Nasdaq:DOCU)	Lyft (NASDAQ:LYFT)	Robert Half (NYSE:RHI)	Veritas Investments
Envestnet (NYSE:ENV)	myDNA	RSM	Xpansiv

About FEI

Financial Executives International (FEI) is a nationwide group of more than 10,000 senior-level financial executives organized around 55+ chapters in the U.S. Membership in FEI's San Francisco Bay Area chapter provides senior finance executives in the greater San Francisco, East Bay, North Bay, and just south of SF regions 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.

* Company names and ticker symbols are aspects which were applicable at the date of each Bootcamp

Thank you to our Strategic Partners!



CFO Bootcamp/Programs Committee:

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Dolores Dumas-Aris
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