

Corporate Strategic Partnership Program

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).

Strategic partners have an opportunity to designate a representative to attend each of our Local Pod events – enabling several people from a strategic partner's organization to meet and network with our chapter's members.

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.

Our programs provide opportunities to showcase the experience and resources of our Strategic Partners.



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
- Mark Witriol – Co-Founder of Pet Food Express
- Jennifer Ceran – former CFO at Smartsheet and former Finance Leader at Box, eBay, and Cisco; member of five boards

Similar to our in-person programs, our virtual events also provide the ability to showcase the experience and resources of our Strategic Partners. Our chapter’s virtual events also typically include attendance nationwide by members of other FEI chapters.



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.

Strategic Partners are involved with designing and facilitating the Bootcamp sessions, and have a chance to showcase their expertise and get to know participants over the duration of the Bootcamp program.



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*.

We are also exploring the formation of other groups (Life Sciences, Nonprofits).

Strategic Partners have the ability to develop and lead Affinity Groups based on their areas of expertise, interest, and focus.

- **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.



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.



Corporate Strategic Partnership Program

At FEI SFBA, we view our Corporate Strategic Partners (“SPs”) as true partners and not “sponsors” – with partnerships viewed as long-term relationships which enable growth and success for both SPs and the chapter.

SPs have many opportunities to build and nurture meaningful relationships with our member financial decision makers, and can showcase their firms’ strengths at our many events. Many of the relationships established between members and SPs, as well as *between* SPs, span the careers of both parties and have led to mutually beneficial business relationships with a high trust level.



SP Benefits

Specific benefits and opportunities available to SPs include:

For in-person events:

- Complimentary attendance for one SP representative to attend:
 - All Local Pods networking events
 - All other in-person eventsAdditional SP representatives may attend when each is accompanied by an FEI-eligible executive
- Opportunities to invite an unlimited number of first-time guests who qualify for FEI membership to in-person events
- Recognition at each event

For virtual events:

- Opportunities to present or co-present one or more virtual programs, including topical webinars, panel discussions, and interactive workshops – with nationwide reach across FEI chapters
- Opportunities to provide input associated with content for events – topics, speakers, panelists, etc.
- Opportunities to invite an unlimited number of guests who qualify for FEI membership
- Verbal recognition at all virtual events

Other:

- Logo displayed on our website
- One complimentary registration for a finance executive to each CFO Bootcamp program (\$499 value)
- Opportunity to serve on FEI SFBA board committees (including Programs/CFO Bootcamp, Membership, and the AI Steering Committee – each involving direct, ongoing engagement with members and prospects)
- Opportunity to initiate/lead/sponsor one-time events or Affinity/Mastermind groups

New/Upcoming Initiatives:

- Partner profiles and the ability to share details on upcoming events and whitepapers/other information in regular emails and in LinkedIn posts
- Expanded partner information on the chapter’s website

Strategic Partnership Investment:

- The annual Strategic Partnership fee is \$5,000.
- Partnership start dates are flexible – the annual fee covers a full year from the date the partnership begins.

Current Strategic Partners

