

FP&A Innovation

Reap the rewards of successful planning through strategic finance initiatives

Optimize decision making



the experts...

There is no question that IE Group provides the gold standard conferences in the industry and will connect you with decision makers within business forecasting & planning. You will meet senior level executives from major corporations and innovative small to medium size companies.



Previous speakers include:

- Sam Garfield, VP, Operational Excellence / Enterprise PMO, **Discovery Communications**
- Rey del Valle, SVP, Finance, **Live Nation**
- Andrea Freedman, Chief Financial Officer, **Method**
- Jim McComb, SVP, Strategic Planning, **Executive Next Practices**
- Greg Staton, Vice President, FP&A, **FXI**
- Bob Peruzzi, Senior Director FP&A, **LivingSocial**
- Parisa Naserlavi, Finance Director, Decision and Capability Transformation, **Cisco**
- Eric Lundberg, Senior Vice President and Chief Financial Officer, **ALM**
- Matthew Ackerman, Senior Director, Finance, **HD Supply**
- Tarun Chopra, Chief Financial Officer, **Clements Worldwide**
- John Coskran, Senior Director, Domestic FP&A, **Best Buy**
- Patrick Gillard, Chief Financial Officer, **Group CFO, Amphenol Military & Industrial Ops**
- Dan Surette, Director, Finance, **Thomson Reuters**

the content...

Effective financial planning is central to business success. In the modern business environment technological developments and the advances of globalization have created unparalleled opportunities for businesses to expand their markets. But new opportunity has opened the door to new challenges.

This summit will focus on the solutions offered by innovative financial planning and business forecasting. It will comprise of learning objectives, illustrated intermittently with a number of exploratory case studies, to include:

- Strategies to engage senior leadership around financial forecasts and reviews, as well as methods to facilitate this
- Using the financial forecast as the vehicle to drive accountability for results
- Learn how to optimize the role of Financial Forecasting & Planning in your company
- Budget, Financial Plan and Forecasting - an approach to a single repeatable financial planning cycle

and much more.....

who will you meet?...

Previous delegates (partial list):

- Chief Financial Officer, **DC Shoes**
- Controller, **Intel Corporation**
- Vice President & CFO, **Musician's Friend**
- Director, Finance, **Adobe Systems**
- Vice President, FP&A, **Bright Horizons**
- Vice President, Finance & Systems, **IAC**
- Vice President, Finance, **NBC Universal**
- Dr, Finance, **Hershey International**
- Vice President, Finance, **Chemtura Corporation**
- Senior Director, Finance, **Microsoft**
- Sr. Vice President, Financial Systems, **Genworth**

- Director, Finance, **Warner Bros**
- Sr. Vice President, Retail, **Sara Lee Corporation**
- Director, FP&A, **Xerox**
- Senior Director, Finance, **Sage Healthcare**
- Senior Manager, FP&A, **Boston Scientific**
- Director, Supply Chain Finance, **Ralph Lauren**
- Senior Manager, Finance, **Ebay**
- Senior Director, Strategy, **Office Max**
- Director, FP&A, **Hewlett Packard**
- Senior Director, Finance, **ConAgra Foods**
- Vice President, **Citigroup**

previous speakers...



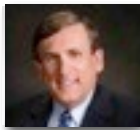
Dan Surette,
Director, Finance,
Thomson Reuters



Andrea Freedman,
Chief Financial Officer,
Method



Sam Garfield,
VP, Operational Excellence,
Discovery Communications



Jim McComb,
SVP, Strategic Planning,
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Matthew Ackerman,
Senior Director, Finance,
HD Supply



Shyam Desigan,
Chief Financial Officer,
Volunteers of America



Robert Hudson,
Director, Planning & Analysis,
Universal Weather & Aviation



Eric Lundberg,
SVP & CFO,
ALM



Bob Peruzzi,
Senior Director, FP&A,
LivingSocial



Parisa Naseralavi,
Finance Director,
Cisco



Stephen Loree,
VP, Strategic FP&A,
The Detroit Medical Centre



Apurva Desai,
VP, FP&A,
Exponential Interactive



Patrick Gillard,
Group CFO,
Amphenol Military & Industrial Ops



Patrick Peters-Buhler
SVP, Global Business,
Bank of America



Rey del Valle,
SVP, Finance,
Live Nation



Tarun Chopra,
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Greg Staton,
VP, FP&A,
FXI



Sean Pelkey,
Director, FP&A,
CSX



Ellen Scripta,
Director, Finance & Business,
CHS



Adam Ainley,
VP, Finance,
Shout! Factory



David Harrison,
VP, Financial Planning,
Rubio's Restaurants

previous presentations...

Dan Surette, Director, Finance, **Thomson Reuters**



Linking Annual Operating Plans to Long-term Strategic Plans



Thomson Reuters is a \$13 billion company that provides intelligent information to professionals around the world. The company is grounded in continually evaluating its portfolio of businesses. Overall we dedicate considerable time analyzing the market segments that we compete in. From a finance perspective, our challenge has been linking long-term strategic planning and portfolio decisions with short-term operational plans. This year we have embarked on a new process that utilizes market forecasts in our strategic plan to drive initial forecasts for our annual plan. The goal is to ensure external drivers are determining internal plans, and also to align strategic investments with business targets.

Dan Surette is the Director of Finance for Corporate FP&A at Thomson Reuters. In this position, he is responsible for driving the global planning process, aligning strategic planning with operational planning, and setting incentives across the organization. Dan has been with Thomson Reuters for over eight years in multiple positions including commercial finance, M&A, and product integration. Prior to Thomson Reuters, Dan was a Bank Examiner with the US Treasury Department. He has a Bachelor of Science degree in economics and political science from Northeastern University and earned his MBA at New York University.

Andrea Freedman, Chief Financial Officer, **Method**



Implementing the Planning Process at Method



As method, the leading eco-friendly cleaning products manufacturer, evolved from early-stage growth into a company that could consistently deliver base business AND new growth, it needed to re-think its planning process. But “planning” is a 4-letter word in a culture driven by entrepreneurial energy and creativity. Andrea was charged with the task of designing a planning process that would drive greater predictability and capacity for achieving financial goals without cramping the style of the place. And it had to be simple enough to fit on one page—OK, one really big page. Method is now in its second cycle of “Master P,” the planning process that is transforming how we collaborate to drive business results today and in the future. You’ll hear about how we got it underway, what’s working, and what we need to do better.

A CPA with many years experience in fast-growth consumer products companies, Andrea joined method in 2004 to help lead it from start-up to sustainable-growth mode. Prior to method, Andrea led finance and accounting for two early-stage companies (LifeSpring Nutrition and Switch Manufacturing) which were sold to strategic acquirers. Her prior career was in research and management in the nonprofit sector with the Institute for Food and Development Policy among others. She is co-author with Medea Benjamin of Bridging the Global Gap: A Handbook to Linking Citizens in the First and Third Worlds, a book that helped launch the nonprofit Global Exchange.

Sam Garfield, VP, Operational Excellence / Enterprise PMO, **Discovery Communications**



The Journey to Finance Transformation at Discovery Communications



The transformation of the Finance organization at Discovery began with the goal of building a stronger and more cohesive Global Finance organization which included an examination of accounting and finance structures and processes across the company. Our aim was to ensure that the organization was serving our internal clients in the most efficient and effective manner and that the group was providing operating leaders with timely, accurate and actionable information to make informed business decisions. This presentation will review the journey the Discovery Finance group took to improve in these areas.

Sam Garfield has spent the last seven years at Discovery Communications focusing on financial systems and process improvement. Sam is currently the Vice President, Operational Excellence / Enterprise PMO. Discovery Communications is the world’s number one nonfiction media company reaching more than 1.5 billion cumulative subscribers in over 170 countries. Prior to Discovery, Sam worked at BearingPoint, AOL Time Warner in International Finance and Arthur Andersen LLP. He has received a Bachelors and Masters of Business Administration from the University of Maryland.

Jim McComb, Senior Vice President, Strategic Planning, Executive Next Practices



Silver Bullet Financial Forecasting

The uncertain future that faces American business today often challenges the accuracy of financial forecasts. Those organizations able to forecast with pinpoint accuracy during uncertain times understand that financial forecasting isn't always about finance. They know the One Thing that drives all change in American business, and they leverage it to forecast accurately and become leaders who redefine success and find new ways to achieve it. Those attending this powerful session will discover that "One Thing," and learn how to use it to more accurately forecast their organization's future potential for growth in revenue, profitability and other key performance areas.



One of America's leading strategic planning executives for more than 25 years, Jim McComb has led planning efforts at the country's largest credit union, largest mortgage company, and largest community bank holding company, and was a partner in the world's largest strategic planning consultancy. He is in demand as an executive coach, and is a prolific author and frequent keynote speaker at business summits. Jim is past national president of the Association for Strategic Planning and on the board of the Executive Next Practices Institute, a think tank for C-level executives. Among the nation's first Certified Strategic Management Professionals, he was elected to the Strategic Planning Hall of Fame in 2009.

Shyam Desigan, Chief Financial Officer, Volunteers of America Chesapeake



Leveraging Business Intelligence and Predictive Analytics to deliver real-time FP&A



Founded in 1896, Volunteers of America is one of the top 10 non profits in the U.S. when measuring size and budget. As a \$1.3 billion organization working in 46 states and serving some 2 million people in 400 communities, the challenge of managing, analyzing and acting upon intelligence gleaned from these programs called for some IT innovations, including building a cloud-based knowledge management system. At Volunteers of America Chesapeake we have embarked on building a more effective risk management process to incorporate macro economic as well as operational metrics to align and fine tune our forecasts and strategic plan. We have embraced Cloud based BI and predictive analytic tools to drive our FP&A process and are integrating the FP&A system with our Operational performance management system to be able to re-forecast on a real-time basis.

An MBA with thirteen years of Finance, IT and project management experience, Shyam Desigan has focused on enabling healthcare providers and non-profits use outcomes-based benchmarking to build a sustainable competitive advantage. Shyam joined Volunteers of America in February 2009 to manage corporate and project finance & IT operations for the non-profit's 26 human service programs throughout the Mid-Atlantic. Since joining the Volunteers of America Chesapeake executive team, he had been recognized locally and nationally for the dramatic strides he has made for the non-profit including executing a turnaround leveraging Analytics and technology. He has received an MBA in Finance from Kelley School of Business, Indiana University and a BS in Electronics Engineering.

Robert Hudson, Director, Financial & Operational Planning & Analysis, Universal Weather & Aviation



Transforming the Role of Finance



Financial performance and analytics should support corporate decision making. A separation of financial information from operational insights and experience creates exposure for inefficiency, lack of prioritization and negative profitability impacts. Bridging this gap through financial partnerships across an organization fosters creative and collaborative approaches to decision making and provides concrete analysis and support.

Learn how Universal Weather and Aviation, Inc. is transforming the role of its finance organization. Understand how to improve decision making consistency that incorporates operational impacts and financial projections. Discover how to facilitate executive level prioritization of corporate goals and alignment to individual business areas.

Rob Hudson is Director of Financial Planning & Analysis at Universal Weather and Aviation, Inc., the leader in Business Aviation support services. Bringing 10+ years of finance and business development experience, Rob is charged with developing the financial analysis group to provide analytics that drive and enhance corporate decision making. Prior to joining Universal, Rob held positions at Continental Airlines and CEMEX in the areas of FP&A and business development. He earned a Bachelor of Arts degree in economics from the University of Michigan and an MBA in finance from Rice University.

Bob Peruzzi, Senior Director, FP&A, **LivingSocial**



Forecasting & Planning in a Rapidly Changing Environment

The emergence and rapid proliferation of social commerce has brought with it a unique set of challenges for FP&A leaders across the industry. The planning process within these organizations must be dynamic enough to balance enormous top-line growth potential with profitability objectives and resource constraints, while at the same time being flexible enough to enable companies to rapidly adjust to the dynamic environment in which they operate. "Forecasting & Planning in a Rapidly Changing Environment" will explore these and other challenges in depth, and provide actionable insights to the finance leaders facing them.

Bob Peruzzi is Sr. Director of FP&A at LivingSocial, a leading online local commerce platform connecting consumers and merchants in 25 countries worldwide. His experience prior to LivingSocial spans 10 years and a variety of roles, including Director of FP&A at RecycleBank, Associate Director of Equity Research at UBS Investment Bank, and Financial Analyst at Capital One. Bob earned an MBA from NYU Stern, a BS in Finance from Penn State University, and is a Chartered Financial Analyst (CFA).



Parisa Naseralavi, Finance Director, Decision and Capability Transformation, **Cisco**



The Journey to True Business Intelligence

When a company is growing, each function is in a silo. There isn't an integrated approach to getting and sharing data. When a company reaches a certain size, it's necessary to do corporate portfolio management effectively- having functions run their own reports and consolidate is not going to scale.

The Journey to True Business Intelligence tells the story of how Cisco went from manually collecting and sharing financial business intelligence to centralizing and standardizing the approach. This resulted in high quality and accurate data within a framework that was scalable, sustainable and compliant. Key highlights include: Best practices and lessons learned along the way; Evolving the centralized model into a Business Intelligence Shared Services Function; Leveraging change management and adoption strategies to achieve our vision

Parisa Naseralavi is the Director of Finance for the Decision and Capability Transformation organization within Cisco. Under her leadership, her organization creates consistent, scalable and comprehensive data architecture, processes and Enterprise-wide applications to drive alignment between business investments and Finance capabilities and values. During her ten years at Cisco, Parisa has held leadership positions in Customer Advocacy, World Wide Supply Chain Manufacturing and Customer Service. Prior to Cisco, Parisa worked as a Chemical Engineer for the Monsanto Company in San Diego, California. She has a Bachelor's degree in Chemical Engineering from South Bank University in London.



Apurva Desai, VP, Financial Planning & Analysis, **Exponential Interactive**



Digital Media and the FP&A Function

The pace of innovation in digital and social media has been occurring at an incredible rate. Prominent sites such as Facebook, Twitter, and LinkedIn have become common vocabulary for much of the world. This discussion will center on how digital media products like Twitter, Quora, and RSS readers can affect an FP&A team's business acumen, competitive intelligence, investor relations practices and even identify assumptions for economic business models. Likewise, how tools such as LinkedIn and TripIt have become essential hiring and networking vehicles for global Finance professionals. While Finance professionals often don't see how these tools are applicable to their jobs, this discussion will show how these tools can, in fact, drive improved performance and efficiencies in their teams.



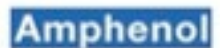
Apurva Desai is a finance executive with experience in the Internet, mobile, and digital media industries. Currently serving as VP Financial Planning & Analysis at Exponential Interactive, the parent company of leading digital advertising company Tribal Fusion, he built his career foundation at industry giants Ernst & Young, Intel and Yahoo! followed by experiences at growing, scaling companies: recent IPO mobile gaming leader Glu Mobile, venture backed startup Scrapblog (backed by Disney) before his current role at Exponential. He also has digital experience on the content creation side as a blogger about the Internet and globalization whose work has appeared at leading tech blog the Next Web and the Canadian Broadcast Centre (CBC).

Eric Lundberg, Senior Vice President & Chief Financial Officer, ALM**Information is King for Driving Accountability**

We use weekly pacing reports that compare sales to date vs. budget and prior year for the same period. We meet with the Division head and sales manager weekly to discuss trends, etc., plus review sales pipeline reports. These two vital tools allow us to much more accurately forecast our various revenue streams which include, advertising, subscriptions, events, books, etc...

For expenses, we monitor headcount via payroll and meet weekly with the production head and with the head of IT so that we can accurately forecast expenses. We also do a complex 13 week rolling cash flow forecast that is updated monthly so that we can accurately project cash.

Eric Lundberg was named Chief Financial Officer in 2008. He joined ALM from Penton Media, Inc. where he served as CFO and COO for the company. Previously, Mr. Lundberg was Vice President and CFO of ALM from 2003 to 2007, and Vice President, Finance for the company beginning in 2001. Mr. Lundberg was Publisher of ALM's Texas Lawyer Division from 2000 to 2001. He joined ALM in 1995 and held a variety of financial positions with the company, including Corporate Controller and Director of Financial Planning. Mr. Lundberg began his career with First Fidelity Bank and Price Waterhouse. Mr. Lundberg graduated from Lehigh University with a B.S. degree in accounting.

Patrick Gillard, Group CFO, Amphenol Military & Industrial Ops**Exporting Financial Planning & Analysis to China**

Over the last five years, Amphenol's connector business saw a dramatic market shift from North America to Asia. In response, Amphenol established full scope business enters in China to gain a competitive advantage and expand its base of Chinese customers. Finding manufacturing and engineering resources was not difficult, but finding experienced FP&A talent was almost impossible. Amphenol was faced with a dilemma: Sacrifice their autonomous general management model by having all planning and analysis done in the U.S., or train local accountants to become FP&A professionals, and act as the GM's primary resource for making decisions to run their business with autonomy and accountability.

Patrick Gillard is the Group CFO of Amphenol's Aerospace and Industrial global business. He is responsible for the profitability of 12 divisions and has been instrumental in implementing the financial planning and analysis tools across the globe. Patrick has been at Amphenol for over 3 years, and prior to that, he worked at General Electric, Dover Corporation, Francisco Partners and Forstmann & Little Company. He has held several positions in FP&A and M&A and has held positions in Europe and Asia. He holds a Bachelor of Arts degree in Economics and Mathematics from Colgate University, and is a graduate of the GE FMP Program.

Patrick Peters-Bulher, SVP, Global Business Solutions, Bank of America**The Next 5 Years: innovation in Treasury and Finance**

While for many years there was a virtual standstill in Treasury Technology, the past 2 years and the next 5 year will show much innovation. After a generation of investing in ERP's and stand alone TWS, mainly to enhance FP&A, a virtual standstill in spend over the past 3 years has been reversed, and companies are again investing in innovation. More and more multinationals are focusing on STP and HTH, and Swift for Corporate Becomes commonplace. Moreover SEPA and SAAS will change the way finance and Treasury will perform over the next decade.

Patrick Peters-Buhler works for the GBS unit of Bank of America Merrill Lynch. He has been involved in treasury management and capital markets for over 15 years. His experiences include positions as a CFO and as a Corporate Treasurer in global industries including Pharmaceuticals, Consumer Products, Manufacturing, and Financial Services. Patrick joined BAML in 2011 after a Career in the US and several Latin American Countries, including Mexico, Argentina, Uruguay, Peru, Chile and Colombia. He is a Certified Treasury Professional by the AFP. He has been chairing and participating in Conferences in Latam, USA and Europe on issues of Treasury, Liquidity Management, Cash and Risk Management. He is a Senior Tutor for Eurofinance for Treasury and Risk management Courses in the Americas and Europe and taught at Universities in New York, Lima, Buenos Aires and Mexico City. He has been the President of the Latin America Treasury Association for the 2010 -2011 year.

Tarun Chopra, Chief Financial Officer, Clements Worldwide**The Process of Financial Analysis**

An overview of alignment between capital planning, business operations, financial analysis and planning cycle. All companies conduct financial analysis of various sorts. The presentation takes best practices across various industries and provides an efficient, structured process on conducting financial analysis.

Tarun Chopra is a senior business executive with over 18 years of experience in finance, strategy, accounting and M&A. As CFO, Vice President of Finance at Clements Worldwide, he is responsible for leadership, strategic and oversight accountability of the Finance division, in addition to corporate compliance, among other responsibilities.

He has held multiple leadership positions globally with Fortune 500 companies, including Fannie Mae, Whirlpool Corporation, Boston Consulting Group and Ernst & Young. He has a Chartered Accountancy and earned his MBA from Melbourne Business School.

Stephen Loree, Vice President, Strategic FP&A, Detroit Medical Centre**The Implications of Healthcare Reform on Providers, Insurers and the Business Community**

On March 23, 2010, President Obama signed into law "The Patient Protection and Affordable Care Act", H.R. 3590. Two days later, on March 25, a companion bill (H.R. 4872, "The Health Care and Education Affordability Reconciliation Act of 2010) passed both chambers. If implemented as passed, this legislation will fundamentally change the structure of the healthcare market as we know it today. To the extent that we are all involved in healthcare, either as providers of services, or as employers who fund a significant portion of the costs, or as individuals who receive services from the delivery system, we will all be impacted by the changes anticipated by the reform legislation. This presentation summarizes the major provisions of the legislation, identifies the impact on the market, and reviews strategies contemplated to deal with anticipated change.

Stephen W. Loree has been with the Detroit Medical Center since January, 1991, serving as Corporate Vice President for Strategic Financial Planning and Analysis. In that capacity, he has been involved in many financial feasibility studies ranging from mergers and acquisitions to analyses of healthcare programs and services across the system. Prior to his employment at the DMC, Mr. Loree spent eleven years at the University of Cincinnati Hospital, where he was involved with the Ohio Hospital Association and other major Medicaid providers as an advocate on Medicaid payment issues in Ohio. Mr. Loree holds degrees in Business Administration, Physics and Mathematics and is a fellow of the Healthcare Financial Management Association, and a member and past Chair of the Michigan Association of CPA's Healthcare Committee.

Sean Pelkey, Director, Financial Planning & Analysis, CSX**The Perfect Slide**

As FP&A professionals, we are tasked with boiling complex financial data down into easy and actionable solutions. In an uncertain economic environment, we're challenged to create scenarios, identify sensitivities and match costs and resources to activity. As we focus on the analytics, we often forget the end result is communicated via simplified executive-level PowerPoint slides. This talk focuses on how CSX has leveraged slidework to communicate sensitive and challenging information to management. While PowerPoint can easily become your worst enemy, it can also be your closest ally when used properly and for the purpose of convincing senior management or other stakeholders to take action.

Sean Pelkey is Director of Financial Planning and Analysis for CSX. Having spent the early part of his career in nonprofit management, he has held a variety of positions for CSX, one of the nation's leading transportation companies with 21,000 rail network miles serving 23 states. In addition to Financial Planning, Sean has served in a finance capacity at CSX supporting Intermodal sales and strategy as well as the Technology support organization. He specializes in the ability to take complex analyses and communicate them simply in an actionable way for senior management, internal stakeholders and investors. Sean earned his bachelor's degree from Boston University and his MBA from the University of Florida.

Stacey Green, Vice President, Finance, Disney Music Group**Panel Session: Driving More Actionable Forecasts**

How can the 'finance end' of Sales & Operations Planning support more accurate forecasting of business units with differing customer bases? This panel includes a perspective of how different outputs from the S&OP process support both businesses with a traditional budgeting approach (mature, with established patterns) and those that are more attuned to rolling forecasts (growth oriented). The benefits go beyond a more accurate top-line forecast, including managing variable costs such as raw materials and direct labor, as well as greater clarity on the effects of the customer mix on cash flows.

Stacey is the Vice President, Finance for the Disney Music Group, which encompasses Disney's recorded music, music publishing and concert operations. Under its two record labels, Walt Disney Records and Hollywood Records, Disney Music Group distributes original music and motion picture soundtracks, and manages a diverse roster of artists. Stacey specializes in international taxation and finance planning and has been focused on the music sector for over 8 years. Prior to joining Disney, Stacey worked in various venture capital entities that focused on investing in music-based properties such as unique live music tours and events, high-caliber touring exhibitions, theatrical performances, and consumer and multimedia product offerings. Stacey is a CPA, a Canadian Chartered Accountant, and has a Bachelor of Commerce from the University of Saskatchewan.

Greg Staton, VP, Financial Planning & Analysis, FXI**Panel Session: Driving More Actionable Forecasts**

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Greg Staton is Vice President, Financial Planning and Analysis for FXI, a leading manufacturer of polyurethane foam headquartered in the greater Philadelphia, PA area. In this role, Greg is responsible for budgeting, forecasting, and strategic planning for the company. Prior to joining FXI in October of 2010, he spent six years at Campbell Soup Company in a variety of Business Unit Finance and Corporate Development roles. Earlier in his career, Greg was a Surface Warfare Officer in the United States Navy for seven years. He earned his undergraduate degree from Duke University and his MBA from Wharton.

Adam Ainley, Vice President, Finance, Shout! Factory**Panel Session: Driving More Actionable Forecasts**

How can the 'finance end' of Sales & Operations Planning support more accurate forecasting of business units with differing customer bases? This panel includes a perspective of how different outputs from the S&OP process support both businesses with a traditional budgeting approach (mature, with established patterns) and those that are more attuned to rolling forecasts (growth oriented). The benefits go beyond a more accurate top-line forecast, including managing variable costs such as raw materials and direct labor, as well as greater clarity on the effects of the customer mix on cash flows.

Adam Ainley is Vice President, Finance at Shout! Factory, a leading video and audio label, releasing TV series such as Freaks & Geeks, Transformers and Leave it to Beaver. Music titles include releases by Taylor Swift and Herb Alpert. Adam joined Shout! at its inception nine years ago and has overseen the development of the finance and accounting function as the company has grown. Previously, Adam was VP Finance at Getty Images, CFO of Energy Film Library and Director of Planning at Universal Music Group and Virgin Records. Adam is a Chartered Accountant (BDO, London) and a graduate of Manchester University.

Ellen Scipta, Director, Finance & Business Planning, CHS



Evolving Long Range Planning

This presentation will walk through how to take your company from decentralized strategy discussions and individual Microsoft Excel financial models to a leading edge long range planning process. The opportunities and challenges of employing Hyperion Strategic Finance will be reviewed and key features of the tool will be demonstrated including integrated, enterprise financial statements, scenario analysis, and reporting. Key learnings identified while driving the planning process and HSF implementation for CHS Inc. and Best Buy's International Expansion will be discussed.



Ellen Scipta is currently the Director of Enterprise Planning at CHS Inc., a fortune 100 diversified energy, grains, and foods business. Finance and Strategy roles have been the focus of Ellen's career since graduating from Indiana University's Kelley School of Business MBA Program in 2000. Ellen has held positions at Best Buy, Target, and PricewaterhouseCoopers with an emphasis on the incubation of new businesses including Target.com, Best Buy Mobile, and Best Buy's International Expansion. Prior to attending graduate school, Ellen earned a degree in Aeronautical and Astronautical Engineering at Purdue University and served as a Product Development Engineer at The Boeing Company in Seattle, WA. Ellen was selected as the Kelley School Alumni of the Year in 2007 and will be joining the Kelley School Alumni Board in March, 2012. Ellen, her husband, and twin daughters reside near St. Paul, MN.

Rey del Valle, Senior Vice President, Finance, eCommerce & Technology, Live Nation



Growth Opportunities in the Music Business

Challenges in the music business are widely documented: Piracy and the impact of unbundling on record company sales. There is a bright spot, however- Live Music. In this session, we'll explore recent trends and the key drivers of long term growth



Rey del Valle is SVP Finance for eCommerce and Technology at Live Nation, serving as CFO for Ticketmaster's eCommerce platforms with over \$6 billion in annual online and mobile transactions. Previously, he was VP Financial Planning and Analysis for Guitar Center - Direct to Consumer; VP Strategy and Planning at Youbet.com, where he guided the company through its sale to Churchill Downs; Vice President, Finance at Disney-ABC Cable Networks Group. His prior experience included roles as Vice President - Finance and Planning with Nickelodeon Online, where he led finance and sales operations and helped take the business to profitability, and Vice President - Finance, Planning and Strategy with MTV Networks Latin America.

Mr. del Valle holds an MBA from Florida International University (FIU), where he also earned his undergraduate degree, a double major in finance and international business.

Matthew Ackerman, Senior Director, Finance, HD Supply



Developing Financial Acumen of Operational Leaders

Experiencing rapid growth and organizational change, HD Supply's financial complexity has increased. Enhanced financial acumen across the operating leadership is critical to succeeding in sustainably driving profitable growth. Filling this need, our Learning and Finance teams jointly developed a comprehensive financial training course for Senior Managers from all disciplines. Taught by Finance managers, the course leverages actual business results to improve participants' knowledge of financial statements, controllership, and planning discipline. Participants' knowledge is embedded through a customized business simulation requiring them to work in teams to form and make decisions to manage the performance of mock companies over a three year financial period. Knowledge learned must be successfully applied to deliver optimal financial results.



Matt Ackerman is Senior Director of Finance with HD Supply Facilities Maintenance, a leading distributor of Maintenance, Repair, and Operations (MRO) products and services to Multifamily, Hospitality, Healthcare, and Institutional customers across North America. Since joining HDS in 2007, Matt has led a team responsible for providing accurate, timely, and actionable business performance planning and management analytics across the enterprise. Prior to joining HD Supply, Matt worked for GE for 13 years in Finance, Corporate Audit and FP&A positions across multiple GE businesses including GE Capital, NBC, and GE Appliances. Matt earned a Bachelor's in Accounting from the University of Wisconsin.

John Coskran, Senior Director, Domestic FP&A, Best Buy



Slicing the data multiple ways: Predictions, Performance Management & Team Motivation



At Best Buy, like most organizations, we look at our trend data and predict the future in multiple ways. This presentation will provide a brief overview of these techniques as applied in our large Consumer Electronics Retail business. It will also touch on how we bring multiple sources of data into the forecast process while working to avoid creating confusion in subsequent business performance management discussions. Finally, another brief comment or two on some guiding principles to keep team members engaged while they are being asked to create yet another subtly different view of the data.

John Coskran has been with Best Buy since 2000 in a variety of finance roles and currently is the Senior Finance Director and the leader of Financial Planning and Analysis for Best Buy's US business. While at Best Buy John has worked in a wide variety of areas including Domestic and International Mergers & Acquisition valuation and integration, leading Finance process re-engineering and providing decision support and analysis for Best Buy customer segments and business units. After graduating with an Economics degree from Carleton College John worked at Arthur Andersen for five years and obtained his Masters of Accounting degree in 1996, CPA certification in 1998 and an MBA degree in 2008.

Deborah Rhodes, Acting Chief Financial Officer, Alberta Health Services



Sustainability and Healthcare



The question of sustainability and healthcare has been asked a number of times over the years and is again a topic of interest in every healthcare jurisdiction. Deborah will discuss in general terms the case for change, major healthcare drivers and areas of interest.

Deborah Rhodes is a CA with over 20 years of experience in Canadian Healthcare, with 12 years at the CFO level. Deborah was CFO and Vice-President of Finance with the Saskatoon Health Region in Saskatoon, Saskatchewan for 10 years before moving to Edmonton, Alberta to become Senior Vice-president of Finance for Alberta Health Services in June 2010. As of November 2011, Deborah has been the Acting CFO for AHS. AHS is a province-wide health delivery system with a budget of \$12 B, over 90,000 employees, and serving over 3.7M residents.

Tim O'Bryan, Director, Global Consumer Relations, IBM



Forecasting in Turbulent Times



How reliable and timely are your forecasts? How effective are they in helping you address risks and opportunities? In an increasingly volatile business climate, forecasting has never been more important, or more challenging. Many corporations have to confront the fact that their existing forecasting processes are not effective: unpleasant surprises are becoming more the norm rather than the exception. More than ever, Finance organizations need new tools and disciplines that will transform their forecasting process into a dynamic, reliable system that helps identify performance gaps with enough lead time to assess alternatives quickly, and enables effective decision making.

Tim is IBM's Director of Global Customer Relations in the Business Analytics software division. He is responsible for designing and executing a customer advocacy program to drive greater awareness and understanding of Business Analytics-based best practices. Tim has spent over 20 years in the performance management and business analytics space in various roles including his current role, which he's done for the past 6 years. Prior to his current role, he spent 5 years as a Client Services Director at IBM managing its Central U.S. Region and 7 years implementing performance management solutions and financial applications across the globe.

Sean Bernhoit, Vice President, Worldwide Financial Technology & CFO Advisory, **Linium**



Developing Financial Acumen of Operational Leaders



In order to understand the true financial performance, enterprises need to know the true cost. Accurate allocations and cost management help them gain insight into their costs and profitability to understand the true cost and profitability drivers within their business and empowers them with the visibility and flexibility to improve resource alignment, increase margins and ensure profitability. Join the Linium Insight experts to explore different methodologies for allocating and understanding those corporate costs. The latest enterprise performance management tools offer help through traceability maps and audit trails to provide transparency to the cost allocation models as well as multidimensional analysis, to identify sources of profitability and aid decision making through scenario based modeling.

Sean Bernhoit, Vice President, Oracle Worldwide Financial Technology and CFO Advisory, has over 10 years of experience working with OLAP applications and managing financial reporting, analysis, modeling, and planning systems. His comprehensive experience spans Hyperion Essbase, Hyperion Planning, Hyperion Analyzer, Hyperion Pillar, Hyperion Financial Management, System 9 BI+, Essbase Integration Server, Hyperion Reports, Hyperion Web Analysis, and Hyperion Application Link. He is a certified Hyperion Planning Professional who has completed over 100 Oracle Hyperion Planning implementations for large multi-billion dollar clients across multiple industries, in addition to over 25 System 9 Implementations.

Rand Heer, Chief Executive Officer, **Alight Planning**



Planning for Black Swans



In his groundbreaking book *The Black Swan*, Nassim Taleb describes the elements of Black Swans, those highly improbable events (such as the financial crisis of 2008) that cause massive negative and positive consequences. In this fast moving and thoughtful presentation, Rand Heer kicks off a new dialog within the planning community by translating Taleb's theories into best practices for how finance, sales and operations staffs should think about and plan for Black Swans.

Rand Heer is the visionary behind Alight Planning, a leading financial planning and reporting software package. An industry veteran, Alight is Rand's fifth startup in the business performance management space. Previously, he was founder of Pillar Corporation which developed Hyperion Pillar, the first enterprise software for budgets and forecasting. He also started FP&A Train, the original Essbase training company, later acquired by Hyperion; OLAP Train which developed the curricula for Microsoft's business intelligence software; and Aspurity, a business intelligence consulting firm acquired by Hitachi Consulting. Earlier, Rand held various CFO positions with public and private corporations.

Alex Walden, Manager, Financial Planning & Analysis, **Cornerstone Therapeutics**



What Are FP&A Objects and Why Should You Care?



As you'll see in this joint presentation, FP&A objects enable companies like Cornerstone Therapeutics to create forecasts and scenarios without wasting thousands of hours building and maintaining complex error-prone spreadsheets. And coming back at a later date to make changes is a snap. Using an object-oriented approach to manipulating information is nothing new...computer programmers have been doing it for years. But until Whitebirch, no other company applied that approach to managing financial entities. Alex and Kel will present how the FP&A object-based solution transformed financial planning and analysis at Cornerstone

Therapeutics.

Alex Walden is Manager, Financial Planning & Analysis at Cornerstone Therapeutics, a \$125 million specialty pharmaceutical company. For forecasting and budgeting Cornerstone uses Whitebirch Enterprise Planning solution in its business of commercializing respiratory pharmaceuticals acquired by other firms. Prior to Cornerstone, Alex worked in various financial planning, product management and market research capacities at several pharmaceutical companies, including aaiPharma, LipoScience and Mylan Bertek Pharmaceuticals. Alex earned an MBA from the University of Pennsylvania and a BS in Business Administration from The Citadel.

Mark Quint, Vice President, Business Development, Jonova**Integrated Business Planning Best Practice Examples for Finance**

Rapidly evolving markets and uncontrollable events have put planning, governance and risk analysis under pressure to produce more certainty with fewer resources, exposing gaps in the ability to plan under uncertainty. Financial Planning and Analysis (FP&A) processes based on integrated business planning principles enable companies to take control of the new reality by turning decision making into a competitive advantage. Cross-functional processes require technology beyond traditional spreadsheets and an external focus to link longer-term strategic planning to nearer term operational plans. Finance is uniquely positioned to drive new organizational skills designed to better manage risk and take advantage of market opportunities.



Since joining Jonova three years ago, Mark has been Solutions Director and instrumental in the design and implementation of many Fortune 500 FP&A and IBP processes. Through these implementations Mark has generated over a billion dollars of benefits for Jonova's customers. Prior to joining Jonova, Mark spent 16 years with Motorola and Continental AG holding product management and global engineering leadership roles. The best decisions are made when manufacturing, design, sales and finance collaborate to value results in financial terms. Mark holds an MBA from the University of Chicago Booth School of Business and a Bachelor of Science in Electrical Engineering from the University of Michigan.

Kel Hoffmann, President and CEO, Whitebirch Software**What Are FP&A Objects and Why Should You Care?**

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Kel Hoffmann is President and CEO of the company that invented FP&A objects, Whitebirch Software. As an executive who relied heavily on detailed spreadsheet forecasts throughout his 25 years of operations experience, Kel understood the need for a more flexible, comprehensive and accurate forecasting solution than spreadsheets. Prior to founding Whitebirch, Kel was president and CEO of Wakefield Engineering, a division of Alpha Technologies Group. His experience includes a variety of leadership positions in the United States and Europe at the Rosemount Division of the Emerson Electric Company.

David Harrison, VP, Strategic & Financial Planning, Rubio's Restaurants**Unlocking Hidden Value Through Asymmetric Business Economics**

David Harrison will be talking about integrating financial concepts into the Rubio's negotiations. This case-study based presentation will cover examples such as differing costs of capital, valuation methodologies, investment horizons, costs on supply chain inputs, and access to capital markets and derivative products.



David has expanded Rubio's traditional FP&A role through direct involvement in the company's negotiations contributing 7-figure savings to Rubio's bottom-line through lease renegotiations; reducing distribution, telecommunications, insurance, merchant processing, and banking fees; and implementing natural gas core aggregation. Prior to Rubio's, David was the CFO of Jacques Gourmet and Champagne French Bakery. Before that, he held progressively responsible roles in management consulting, business development, finance and strategic planning with Corporate Decisions, PriceSmart and Midway Games. David earned his MBA from UCSD's Rady School of Management and graduated summa cum laude with a Bachelor's Degree in Economics from Penn's Wharton School of Business where he was a Joseph Wharton Scholar.

David Morrison, Director, Financial Planning & Treasury, **Port of Tacoma**



Corporate Performance Management - The Catalyst for Change

Does your organization still use spreadsheets for planning and reporting? Do you want to be a catalyst for change? The market for CPM suites continue to grow and modernize the methods for financial and operational analysis including the automation of non-transactional processes in the finance department that deliver a better understanding of corporate profitability. Attend this interactive and powerful discussion and learn how to work smart with less resources using a CPM solution.



Director, Financial Planning and Treasury for the Port of Tacoma for 6 years. Prior to joining the Port, David spent 7 years at Intel and 2 years at Microsoft in various finance positions. He has his MBA and Master of Manufacturing Engineering from The University of Texas at Austin. David is a licensed Professional Engineer.

Guy Haddleton, Founder & CEO, **Anaplan**



How Technology Innovation is driving a New Paradigm for Planning and Performance Management

Technology shifts are changing the expectations and requirements of enterprise business users. Cloud Computing, Instant Access, Collaboration, Social and Mobile is the new imperative for Enterprise software. Guy Haddleton, Founder and CEO of Anaplan, examines how the latest trends are driving a requirement for a new paradigm for performance management. Topics include: the new imperatives in Planning and Performance Management; Instant Access; Self service apps; Low IT footprint; Rapid time to value; Security; Innovations in business operating models, pricing and technology.



Guy is Co-Founder & Chief Executive Officer of Anaplan, Inc. Anaplan brings breakthrough development and innovation together on a single technology platform in the cloud to enable high performance analytics, modeling, planning, forecasting, and reporting in an enormously powerful online architecture that's capable of scaling to meet the needs of the world's biggest organizations. Guy has 20 years experience in the Business Analytics Sector. He was the founder (1990), Chairman and Chief Executive Officer of Enterprise Performance Planning leader Adaytum. After expanding from market leader in the UK to Europe, the US and Asia Pacific, Adaytum was sold to Cognos in 2003.

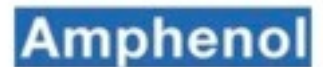
Additional presentations include:



the schedule...

February 23	Day One
08.30 - 10.00	Session One
10.00 - 10.30	Coffee Break
10.30 - 12.00	Session Two
12.00 - 13.30	Lunch
13.30 - 15.00	Session Three
15.00 - 15.30	Coffee Break
15.30 - 17.00	Session Four
17.00 - 19.00	Networking Drinks

February 24	Day Two
08.30 - 10.00	Session Five
10.00 - 10.30	Coffee Break
10.30 - 12.00	Session Six
12.00 - 13.30	Lunch
13.30 - 15.00	Session Seven
15.00 - 15.30	Coffee Break
15.30 - 17.00	Session Eight
17.00	End of Summit



the information...

Financial Forecasting & Planning Summit

Date: February 21-22, 2013
Location: San Diego
California

Registration Pricing

Early Bird Price (expires December 23):

Silver Pass: \$1395
Gold Pass: \$1695
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Regular Price:

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Pass Descriptions:

Silver Pass: Access to all sessions & networking events

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Prices are exclusive of VAT. Places are transferable without any charge to another Summit occurring within 12 months of the original purchase. Cancellations before December 23, 2012 incur an administrative charge of 50%. If you cancel your registration after December 23, 2012 you will be charged the full fee. You must notify IE Group in writing of a cancellation, or you will be charged the full fee. IE Group reserve the right to make changes to the program without notice. NB: FULL PAYMENT MUST BE RECEIVED BEFORE THE EVENT.

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