

PDX EXECUTIVE FORUMS

FINANCE LEADERSHIP FORUM



WEDNESDAY MAY 22, 2019



THE MODA CENTER

PARTNERS



SCHEDULE

The PDX Finance Leadership Forum is an invitation only summit for finance & accounting executives from the leading brands in the Portland area. The executives on the PDX Finance Leadership Forum advisory team drive the strategic direction of the agenda to ensure the content is relevant and delivers maximum value.

> 8:15AM – 8:45AM : CHECK-IN AND MORNING RECEPTION

> 8:45AM : WELCOME COMMENTS



KOREDE ALABI

Chief Financial Officer
General Sheet Metal

> 8:50AM – 9:40AM : OPENING DISCUSSION



MEASURING TRIPLE BOTTOM LINE PERFORMANCE

Tara Bomberger
Vice President
of Finance
A to Z Wineworks

When A to Z Wineworks certified as a B Corporation in May 2014, they were distinguished as the only certified winery in the world. B Corp's rigorous, third party assessment covers the financial, social, and environmental practices of a company to measure triple bottom line performance. Today over 2,800 B Corp certified companies offer operational transparency by measuring what matters.

> 9:40AM – 10:10AM : NETWORKING BREAK

> 10:10AM – 10:50AM : KEYNOTE



THE FUTURE OF DIGITAL COMMERCE: A DISCUSSION WITH NIKE'S VP OF GLOBAL DIGITAL COMMERCE

Mike Buckley
Vice President
Global Digital Commerce
Operations & New
Business Models

In early 2018, Mike Buckley took on the role of VP Global Digital Commerce Operations & New Business Models. In this capacity, Mike leads Digital Commerce site/app operations as well as the delivery of new commercial digital retail opportunities and capabilities globally. He also leads Nike's Global Store business strategy as well as the evolution of Nike's "Post-Purchase" consumer experience.

Mike's prior experiences position him uniquely well to lead in this Digital Commerce role. He has extensive financial and strategic experience while at Nike having led Finance and Strategy for "Integrated Digital" upon first joining Nike in June 2013. Mike also played a key leadership role in building and evolving both Nike Digital and Nike Direct as CFO during it's key transformational years (2016-2017). Mike also brings prior experience

identifying new commercial opportunities and business models from his role as VP of Digital Partnerships at Nike and from his 14 year career in venture at Intel Capital where invested in and helped grow ecommerce and other consumer internet companies.

> 10:50AM – 12:00PM : ROUND-TABLE SESSIONS

ROUND TABLE A



Kevin Burnett



Oren Haker

SURVIVING & THRIVING IN AN ECONOMIC DOWNTURN: ASSESSING RISK AND IDENTIFYING OPPORTUNITY IN A VOLATILE MARKET

With many economists and market participants predicting an economic downturn, Stoel Rives attorneys Oren Haker and Kevin Burnett will lead a discussion on how to insulate your business from market risk and how to structure transactions to turn distress into opportunity for growth.

We will explore the following topics:

- Structuring transactions to insulate companies from risk
- Responding to and mitigating risk as it arises
- Identifying and leveraging opportunities in a distressed market

ROUND TABLE B



April Brady

EXECUTIVE PERSPECTIVES ON A WORLD CLASS FINANCIAL CLOSE

Each year, companies spend in excess of \$221 billion on their ERP, CRM, HRS, and similar systems. This doesn't even include the services around them...include those dollars and you are near half a trillion dollars annually.

Yet still, CFO's find errors in their Statements of Cash Flows, errors in their CFO reports, conflicting data elements in their variance and flux analysis.

The Wall Street Journal reported that more companies had to restate earnings in 2017 than the previous 10 years. What happened?

In the average Financial Close Process, there are more than 2 million replicated data points (think of how many times "revenue" is listed in part or in whole on your reports!). In this discussion, we'll discuss improving processes to transform the financial reporting process.

ROUND TABLE C



Brian Swanson

FRAUD TRENDS: THE EVOLVING LANDSCAPE

Cyber-crime and fraud cost organizations over \$445 billion dollars a year. With that number expected to rise it's critical companies take preventive measures. Please join us in a discussion focused on the latest threats and mitigating strategies to develop a strong defense against these incursions.

> 12:00PM - 12:30PM : HOSTED LUNCH & DOOR PRIZE GIVEAWAYS

> LEADERSHIP TEAM

The PDX Finance Leadership Forum is steered by the Leadership Committee. These executives are responsible for the strategic direction of the Forum, and each of the sessions are structured to bring relevant content and maximum value.

KOREDE ALABI

Chief Financial Officer
General Sheet Metal

KATHY HYPNER-ORTEGA

Chief Financial Officer
Oregon Lottery

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LINDA PEARCE

Chief Financial Officer
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ED SMITH

Corporate Controller
Craft Brew Alliance

MATT WHIPPLE

Corporate Controller
KEEN Footwear

NATALIE HEACOCK

Controller
Patrick Lumber Company

ERIC WINSTON

Chief Financial Officer
Airstream Adventures NW

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