

An aerial night view of a city skyline, likely New York City, with several skyscrapers illuminated. Overlaid on the image are various financial and technology icons, including a large dollar sign, a shopping cart, a location pin, and a circular icon with a grid pattern. The background is a dark blue gradient.

FINANCE & ACCOUNTING technology expo

October 29-30, 2024

Javits Convention Center | New York City

**ATTENDEE
GUIDE**

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YOUR FEEDBACK IS EXTREMELY IMPORTANT TO US. PLEASE FILL OUT THE SURVEY AT THE LINK BELOW TO LET US KNOW HOW WE DID!



Welcome to FATE: Finance & Accounting Technology Expo!

We're thrilled to have you join us! This year's event, produced by the CFO Leadership Council and StrategicCFO360, is more than just another gathering; it's a dynamic assembly of passionate professionals like you shaping the future of our industry.

FATE has its roots in a community of senior finance leaders. It all began two years ago with a simple post on the CFO Leadership Council listserv, where we encouraged members to "share their tech stack." This initiative aimed to foster networking among colleagues facing similar challenges. From the initial 50 responses, we gathered insights on over 250 technologies, revealing the confusion many felt in navigating solution options. This feedback inspired the creation of FATE—an experiential event designed to help you explore game-changing technologies that can transform your business.

As we come together, you'll find an inspiring atmosphere conducive to connecting with fellow finance leaders, sharing your experiences, and learning from some of the field's brightest minds. We recognize that navigating changes in our profession can be challenging, but it also presents incredible opportunities for growth and innovation.

This guide serves as your roadmap for the event, detailing each technology and categorizing them by focus area. Make the most of the theater sessions, demos and exhibitors we've curated for you. Engage in discussions, ask questions, and network like never before! Your unique perspective is what will make this event truly special.

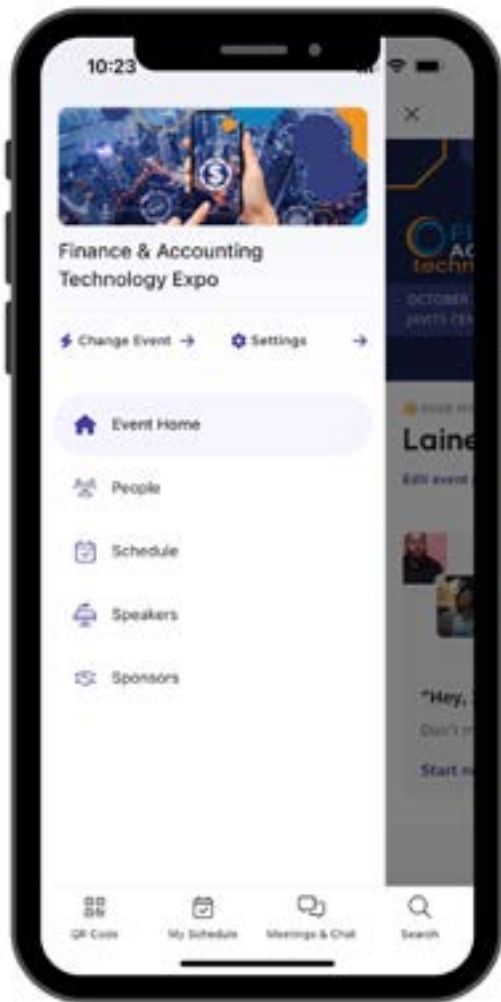
A heartfelt thank you to our sponsors, speakers, and marketing partners for their support and to you for being part of this pivotal moment as we launch this powerful community.

Finally, we invite your feedback and ideas to help us enhance this event and community. Please reach out to me directly, and my team will ensure your suggestions are given serious consideration.

We're grateful you're here,



RD Whitney
COO, CFO Leadership Council,
and FATE Director
rd@cfolc.com



EVENT APP

To access the event app with the schedule, speaker profiles, virtual exhibit booths and additional resources, follow the steps below:

1. Download the Brella app
2. Join the event by entering your join code on the back of your badge
3. Complete your profile to start networking



Network: FATE

Password: Rippling

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THEATER 1

KEYNOTE | Daymond John

Award Winning Business and Motivational Speaker, Founder and CEO of FUBU Clothing, Shark Tank Reality TV Judge, and Bestselling Author

PRESENTED BY



9:00 am – 10:00 am

THEATER 1

THEATER 2

THEATER 3

10:15 am – 10:45 am

Kick Start Accounting Transformation



CFO Best Practices: Work Smarter with AI & BI



10:55 am – 11:25 am

Impact of AI and ML in Financial Processes



How High-Performing Organizations Navigate Transformation



How to Shift to Usage-Based Pricing Without Straining the Back Office



11:35 am – 12:05 pm

Finding the Right Sales Tax Technology for Your Needs



Empowering Finance Leaders: Harmonizing People, Process Innovation, and Cutting-Edge Technology



The Power of Networking. The Power of Friendships



12:15 pm – 12:45 pm

Building Human-like Intelligence in Procure-to-Pay AI



How to Achieve Breakthrough Improvements in FP&A Processes



Using Software & Strategy to Lower Cyber Insurance Costs



12:55 pm – 1:25 pm

How Finance & HR Can Collaborate to Enhance Company Competitiveness and Profitability



Modernizing Travel and Expense Management



AI in Action: Enhancing Supply Chain Management and Fraud Prevention



1:35 pm – 2:05 pm

Transforming Accounting into a Strategic Function



Crafting Your Accounting Innovation Strategy



The Costs and Benefits of AI for Financial Leaders in 2024 and Beyond



2:15 pm – 2:45 pm

10 Ways to Reduce Your SaaS and Cloud Spend in Less Than 30 Days



AI and Human Synergy: Mastering the Future of Finance with AI as a Colleague



Finance Fireside: Getting to the "True Cost" in Global Operations



2:55 pm – 3:25 pm

How to Protect Your Revenue Stream



Revamp Accounts Payable: Modern Methods to Streamline & Automate Your Process



AI Decoded: Beyond Buzzwords to Bottom Lines



3:40 pm – 4:30 pm



THEATER 1

KEYNOTE | The TechStack of Sport: Data and Technology Driving the Future of Sport

Moderator: Angela Ruggiero, 4x Olympic Champion & Gold Medalist, Award-Winning Global Sports Strategist, Innovative Business Architect

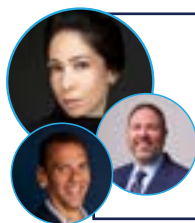
Panelists: Kelly Mahncke, CFO, USA Hockey | Pauline Philippi, CFO, National Women's Soccer League | Tim Naddy, CFO, Savannah Bananas

PRESENTED BY



AGENDA

OCTOBER 30



THEATER 1

KEYNOTE | AI: Funding, Budgeting, and Investment Insights

Moderator: Christine D. Gagnon, CFO, Roha Group

Panelists: Anthony Rose, CFO, Kapitus | Jordan Licht, CFO, Burford

PRESENTED BY



9:00 am – 10:00 am

THEATER 1

How Controllers Can Keep Fraud At Bay With Virtual Cards and Real-Time Budgets



10:15 am – 10:45 am

THEATER 2

Toward the Sounds of Chaos: Applying Lessons Learned from the US Marine Corps to AP Automation



THEATER 3

Driving Business Continuity with AI and Automation: A CFO's Guide to 2024 & Beyond



10:55 am – 11:25 am

Unlocking Financial Excellence at Manhattan Beer Distributors: A Roundtable on Transforming Organizational Planning and Reporting



Efficiency Unlocked: Maximizing Effectiveness in Accounts Receivable



Continuous Accounting: Your Team and Business Will Thank You for It



11:35 am – 12:05 pm

AI Adoption Roadmap for Finance & Accounting



Beyond the Horizon: Exploring AI in FP&A



How Technology is Transforming Spend Orchestration



12:15 pm – 12:45 pm

Modernizing Travel and Expense Management



Catfished by AI? A CFO's Guide to Uncovering Real Business Value



Finance Fireside: Getting to the "True Cost" in Global Operations



12:55 pm – 1:25 pm

Building the next generation of finance leaders with technology



The CFO's Evolving Role in Strategic Growth



Finding the Hidden Cash in Accounts Payable



1:35 pm – 2:05 pm

ACH Strategies for Risk Management and Process Improvement



The Corporate Card Conundrum: Balancing Innovation, Rewards, and ROI



From Embedded to Automated – 100% Reconciliation for T&E and Procurement Workflows



2:15 pm – 2:45 pm

The Future of Finance: Modernization Strategies for a World in Constant Change



Expert Insights—Marketplace Tools for Automation and AI in FP&A



AI in Finance at the User Level: Use Cases and Mitigating Risks



3:00 pm – 3:15 pm

THEATER 1

Pitch Stage Award Ceremony

PRESENTED BY



3:15 pm – 4:00 pm



THEATER 1

KEYNOTE | The State of AI Today

Glenn Hopper, Head of AI Research & Development, Eventus Advisory Group, LLC

PRESENTED BY



PITCH STAGE AGENDA

BROUGHT TO YOU BY 

OCTOBER 29

10:30 am – 10:40 am

Kick-off Presentation presented by Sage

10:40 am – 11:40 am

Pitch Category: Accounting, Financial Planning & Compliance

12:00 pm – 12:50 pm

Success Staffing Strategies to Close the Accounting Talent Gap

1:20 pm – 2:20 pm

Pitch Category: Cash Flows (AP/AR) & Payments

2:40 pm – 3:10 pm

The Operational Plan for the CFO to Drive Both Growth AND Cash Flow



OCTOBER 30

10:40 am – 11:40 am

Pitch Category: Data Management & Security

1:20 pm – 2:20 pm

Pitch Category: People & Productivity Tools

Please Join Us at 3:00 pm – 3:15 pm at Theater 1

Pitch Stage Award Ceremony



PITCH STAGE FINALISTS

Accounting, Financial Planning & Compliance

Avisé
MasRefund
MRGN
Praxi
Predictnow.ai Inc.

Cash Flows (AP/AR) & Payments

Fazeshift
Global PayEX
Insightful Revenue, Inc.
Moneiva
Opstream

Data Management & Security

Change Captain
Ecoclaim Solutions Inc.
Polygraf AI
Preql
Safebooks, Inc.

People & Productivity Tools

Bakstage.AI
Flowlie
Sparc
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DEMO SCHEDULE

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DEMO THEATER 1

DEMO THEATER 2

OCTOBER 29


10:15 am – 10:30 am	Vertice	
10:30 am – 10:45 am		Prophix
10:45 am – 11:00 am	NACHA	
11:00 am – 11:15 am		Ramp
11:15 am – 11:30 am	Bill	
11:30 am – 11:45 am		Unit 4
11:45 am – 12:00 pm	Sage	
12:00 pm – 12:15 pm		Airbase
12:15 pm – 12:30 pm	Payhawk	
12:30 pm – 12:45 pm		OneSource Virtual
12:45 pm – 1:00 pm	Vendori	
1:00 pm – 1:15 pm		Zoey
1:15 pm – 1:30 pm	SquareWorks	
1:30 pm – 1:45 pm		FinQuery
1:45 pm – 2:00 pm	Workday	
2:00 pm – 2:15 pm		Tipalti
2:15 pm – 2:30 pm	NetSuite	
2:30 pm – 2:45 pm		Board
2:45 pm – 3:00 pm	Versapay	
3:00 pm – 3:15 pm		HighRadius


OCTOBER 30

10:15 am – 10:30 am	NetSuite	
10:30 am – 10:45 am		Avalara
10:45 am – 11:00 am	Navan	
11:00 am – 11:15 am		Vic.ai
11:15 am – 11:30 am	MESH	
11:30 am – 11:45 am		Bill
11:45 am – 12:00 pm	Velosio	
12:00 pm – 12:15 pm		SOFTRAX
12:15 pm – 12:30 pm	SC&H Group	
12:30 pm – 12:45 pm		Merchant Advocate
12:45 pm – 1:00 pm	Focus Technology & Artic Wolf	
1:00 pm – 1:15 pm		Pigment
1:15 pm – 1:30 pm	Nominal	
1:30 pm – 1:45 pm		Hyperbots
1:45 pm – 2:00 pm	Trustmi	



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*Driving Growth and Innovation:
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ROBERT K. WITTMAN
Former Special Agent, FBI

*Pursuing the Priceless:
Tales from the FBI's
Real Life Indiana Jones*

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Tech Expos: How To Earn A Higher ROTI

You've probably been to many tech conferences and shows. (My first was Comdex Las Vegas in 1991 when IBM unveiled their first consumer PC, the PS/1. It was also the year Windows 3.0 launched.) Not all expos prove productive, at least for me. To help you hone your tech expo attendance strategy, we've collected some tips on how to get the highest return on your time investment (ROTI).

Not coincidentally, our Finance & Accounting Technology Expo (FATE) is only 11 days away, and we want you to get the most out of it! But if you can't be there, you can apply these pointers to any tech expo you attend in the future.



- **Prep beforehand.** Attendees need an action plan and a stated goal. Bruce Lynn, managing partner of the Financial Executives Consulting Group, advises doing homework on vendors before stepping on the show floor. Then, develop a shortlist of must-see booths and sessions, says Mark Sue, CFO of Breathe Media Network and co-chair of The FENG technology group.
- **Ask, "What problem am I trying to solve?"** and keep the answer in mind to prioritize floor visits to exhibitors and session attendance, Lynn says. Janice Stucke, the CFO of CREW Network, envisions CFOs coming at an expo like FATE from two angles. The first is looking for a specific solution, like an AP system. In that case, visit the top vendors' booths and attend their thought leader sessions to ask more specific questions. The goal would be to leave the conference with two companies for further evaluation. The second approach would be to look for answers to specific challenges for which your company can't find solutions. For example, CREW has "many nuanced credit-card reconciliation procedures for different entities, and it's been challenging to automate that process," Stucke says.
- **I'm going.** "Share on social media that you will be attending the conference and let people know you are open to networking," says Paul Barnhurst, the FP&A Guy. "That could lead to some opportunities that are unexpected." If networking is your goal, try to connect with people beforehand, adds Barnhurst.
- **Book before the conference.** Mark Sue recommends booking meetings with key exhibitors in advance. (For FATE, this can be done through the Brella event app; a signup email was sent to attendees on Wednesday. If you haven't received it, check your spam folder for an email from noreply@brella.io. If you still can't find it, please contact support@brella.io.) "It guarantees you time to go deeper with them," Sue says. Barnhurst agrees: If your attendance is to "review software vendors for a certain type of tool, contact the vendors beforehand."
- **Sessions vs. booth time.** FATE has 70-plus exhibitors, more than 50 sessions given by sponsors and thought leaders, four keynotes and about 40 product demos. How much time

should you spend at the exhibits versus attending sessions and keynotes? It depends on your objectives. Sue finds sessions well prepared, so he would spend 30% to 40% of his time there. If you've already narrowed your vendors-to-see list, says Lynn, you could up that to 60%. Lynn recommends attendees pace themselves and not visit every vendor. "Go for quality over quantity," he suggests.

- **Have your questions ready.** Have meaningful questions or talking points ready for exhibitors, says Matt Barnard, VP of Finance at Vertice. Focus on the vendor's products, services and collaboration opportunities. According to Sue, an example of the questions an attendee might want answered include: "What makes you different from the competition?" "How does your solution help me in my particular industry?" "Give me some success stories and tell me about implementation challenges for companies of our size." Don't forget to network with other attendees; you may find a finance exec who recently acquired or implemented the product or service you're evaluating, says Lynn.
- **Demo decisions.** FATE has two demo theaters with a full schedule of 15-minute product demos. At a booth, however, consider skipping a demo (unless the vendor is high on your priority list) because it can take too long. Additionally, Sue suggests, you can always schedule a demo with the vendor rep post-conference.

Lastly, don't be afraid to trust chance. Barnard recommends leaving parts of your schedule open for serendipitous encounters. "Don't book every minute. ... Stay open to shifting priorities," Barnard says. Adds Sue: "Some of the best moments at expos come from unexpected conversations or random sessions." And, in case you think we're too serious about all of this, there's always the option of not preparing at all. In that case, "just attend and let the excitement guide you," Stucke says.

-Vince Ryan, Editor,
The CFO Leadership Council
vince@CFOLC.com



What's in Your Tech Stack?

We asked Reed Anders, CFO and COO of Third Road Management, what software his fractional financial services company uses while guiding small and midmarket companies.

We're fully committed to the Microsoft ecosystem, which has significantly evolved in terms of functionality and capabilities. While we continue to rely on familiar tools like Excel and PowerPoint, we've taken it a step further by leveraging PowerTools to build workflows that transform the Microsoft stack into a fully integrated solution. Thanks to the intuitive user interface of PowerAutomate [Microsoft's SaaS workflow and process platform], we can manage and maintain the system efficiently without needing a large, specialized development team.

What's your joy, and what's your headache?

Both my joy and headaches originate from the ever-changing technology landscape. The rapid pace of technological evolution is exhilarating and offers nearly endless opportunities for innovation. Exploring new tools and strategies that can drive the organization forward is incredibly rewarding. However, this constant evolution also presents a challenge. There's an ongoing struggle to thread the needle between maintaining the day-to-day operations and driving the necessary innovation to stay ahead of the game. That balancing act is generally where the headaches arise.

If you could wave a magic wand, what would you make software companies do for you?

I'd love to see the development of AI capabilities that allow us to update, integrate and maintain our systems using simple, natural language commands. Imagine being able to add a new user, revise a workflow, build an integration or update a project plan just by describing what you need—no technical expertise required. I believe this kind of functionality isn't too far down the road. While I'm not eager to hand everything over to the robots, there are moments when I'd appreciate their help!

What's your best piece of tech advice for others in your job?

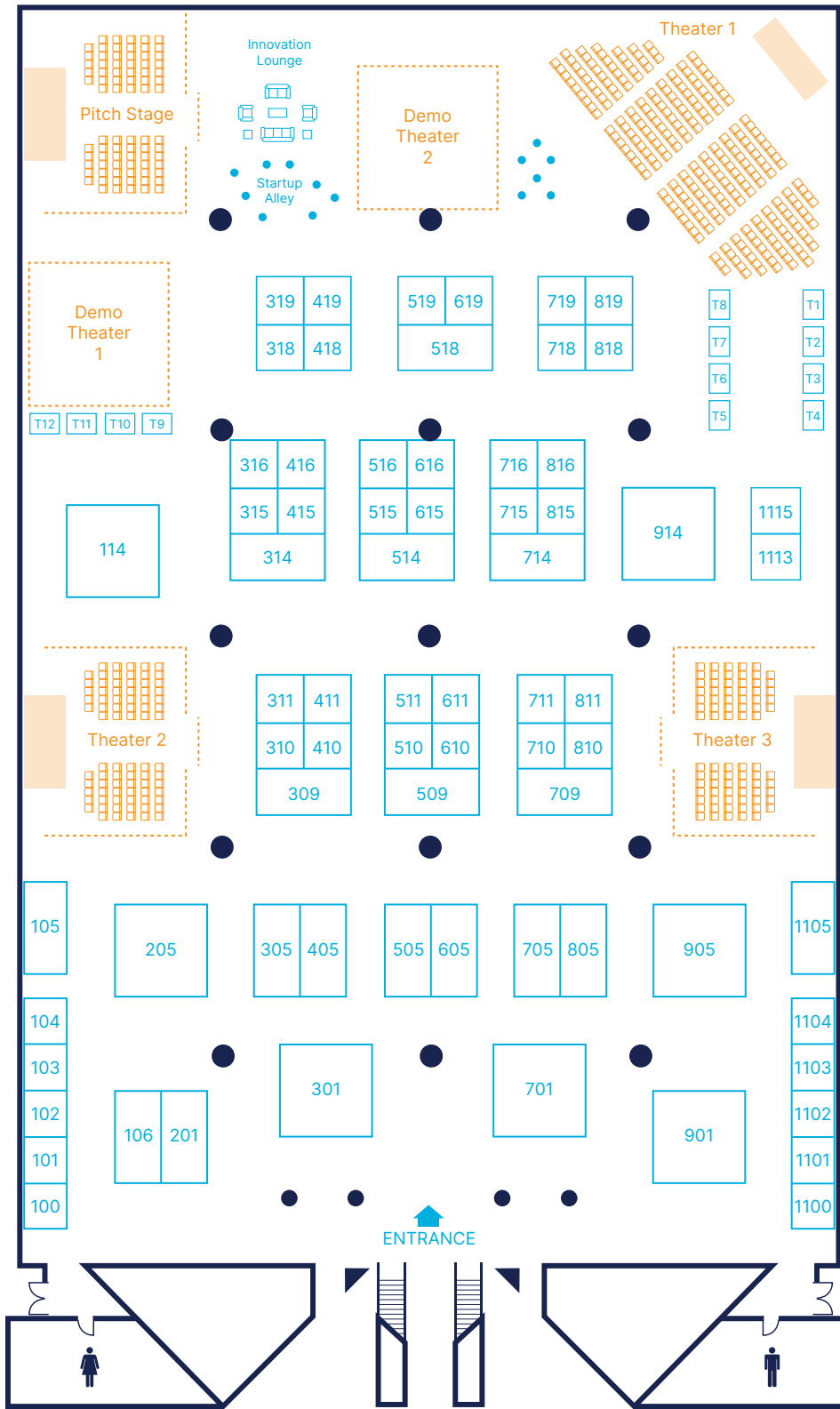
Develop a clear vision for how technology can serve your organization and establish the core pillars that define what you hope to achieve with it. Revisit this vision annually to ensure it aligns with your organization's overarching goals. Having this vision as your North Star is crucial in a world where technology options and capabilities evolve at breakneck speed. It will help you stay focused on your ultimate objectives and prevent you from getting sidetracked by every shiny new tool or trend.



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405	Nacha	611	SOFTRAX	818	IT Solutions
410	Armanino	615	Validation Institute	819	Gatekeeper
411	Nominal	619	RightRev	901	Ramp
415	SoftCo	701	Oracle NetSuite	905	BILL
416	deFacto Global	705	Versapay	914	Hyperbots
418	ancora Software	709	Avalara	1100	Tropic
419	Nova Healthcare	710	BillingPlatform	1101	fintastic
505	HighRadius	711	FinQuery	1102	Deluxe
509	Vertice	714	Prophix	1103	Praxi
510	FloQast	715	Nilus	1104	Planful
511	Trustmi	716	LumiQ	1105	SC&H Group
514	Pigment	718	DocuPhase	1113	Yooz
515	Rippling	719	FutureView Systems	1115	Zoey
516	Bean	805	Payhawk		
518	Sage	810	Unit4		
519	Brex	811	WEX		

EXHIBITOR CATEGORIES

- | | |
|---|--|
|  Accounting Software |  Financial Close/Reporting |
|  Accounts Receivable |  FP&A/CPM |
|  AP Automation/Payments |  Healthcare Benefits |
|  Billing/Revenue Management |  IT Services/Outsourcing |
|  Continuing Professional Education |  Payroll/Benefits |
|  CPQ |  Sales Tax & Tax Automation |
|  Cybersecurity |  Spend & Expense Management |
|  Data Integration |  Vendor Management |
|  ERP |  Workforce Management |

BOOTH 815



ActivityHD, created by AccountingWare, is an adaptable ERP system capable of handling complex general ledger and payroll situations, yet easy enough to use in less demanding environments. The integrated suite of applications also includes accounts receivable, accounts payable, purchasing, bank reconciliation, fixed assets, report writing, and document management. ActivityHD interfaces with most third-party software applications, facilitating efficient data transfer and eliminating the need for manual entry.

Kellie Hill: khill@conetrix.com

accountingware.com

BOOTH 605



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Sarah Barker: sarah.barker@airbase.io

airbase.com

BOOTH 418



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BOOTH 316



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Brinlyn Stover: brinlyn.stover@arcticwolf.com

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Alexandria Pakalnis: alexandria.pakalnis@armanino.com

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BOOTH 709



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Amanda Montag: amanda.montag@avalara.com

avalara.com

BOOTH 516



The Bean AI platform helps finance teams achieve recurring and strategic initiatives more affordably and efficiently than ever before. Using Bean's software, teams do more, in less time by:

- Reducing reconciliation time
- Integrating analytics for more accurate flux analyses
- Automating technical accounting research
- Creating journal entries, policies and memos in minutes

Jason Kesten: Jason@beanai.com

beanai.com

BOOTH 905



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Carli Smyth: carli.smyth@hq.bill.com

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BOOTH 710



BillingPlatform provides the power needed to automate enterprise-grade revenue lifecycle processes. From subscriptions to sophisticated usage-based pricing models and everything in between, we meet the challenge of modern monetization.

Kate Barr: kate.barr@billingplatform.com



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BOOTH 106



Board enterprise planning solutions help over 2,000 organizations worldwide plan smarter, enable actionable insights, and achieve better outcomes. Industry leaders trust Board to unify strategy, finance, and operations through more integrated and intelligent planning, and achieve full control of performance. Partnering with Board, global companies such as H&M, BASF, Burberry, Toyota, Coca-Cola, KPMG, and HSBC have successfully digitally transformed planning processes to build a competitive edge. Founded in 1994 and now with 25 offices worldwide, Board is recognized by leading analysts including BARC, Gartner, and IDC.

Cristina Lepore: clepore@board.com



board.com

BOOTH 519



Brex is an AI-powered spend platform with corporate cards, banking, treasury, and global payments, plus intuitive software for travel and expenses. Thousands of companies from startups to global enterprises, including DoorDash, Flexport, and Compass, use Brex to effortlessly manage every type of spend in one place, in actual time.

Elaine King: eking@brex.com



brex.com

BOOTH 319



Cube is a cloud-based FP&A platform that helps companies hit their numbers without sacrificing their spreadsheets.

Jackie Duggan: jackie.duggan@cubesoftware.com



cubesoftware.com

BOOTH 311



DataBlend is an Integration Platform-as-a-Service (iPaaS) solution designed exclusively for CFOs, controllers, and their teams. Featuring a no-code, low-code workflow builder, DataBlend allows accounting and finance professionals to create secure and worry-free data integrations. Companies use DataBlend to collect and join data from multiple sources, build workflows, and schedule events so users are never without real-time data access. DataBlend's intuitive interface makes it easy to manage all application integrations from a single platform.



Kate Johnson: kjohnson@datablend.com

datablend.com

BOOTH 416



deFacto Power Planning is a high-performance planning platform that is powerful enough to support any organization's every planning need, including FP&A, HR, S&OP, Demand Planning, Tax Provisioning and more. It uniquely integrates all these planning capabilities into Power BI and Excel, so it's simple to use. Business users can develop and manage their own planning applications without the need for technical support and it offers hundreds of off-the-shelf solutions, reports, templates, and integrations for rapid implementation.



Bob Bedard: bbedard@defactoglobal.com

deFactoGlobal.com

BOOTH 1102



Deluxe is a modern Payments and Data Company, championing business so communities thrive. With roots tracing back more than 100 years as the original payments company and inventor of the checkbook, we've evolved into a leader in digital payments and data solutions, facilitating seamless connections to propel businesses forward. Leveraging our powerful scale, we support millions of small businesses, thousands of vital financial institutions, and hundreds of the world's leading consumer brands, processing nearly \$3 trillion in payment volume annually.



Amanda Kurkowski: Amanda.Kurkowski1@deluxe.com

deluxe.com

BOOTH 718



DocuPhase offers a comprehensive suite of intelligent financial solutions that create predictability, visibility, and efficiency. Its workflow automation solutions, including AP automation, financial document management, invoice capture, and payments, are designed to optimize and automate back-office operations, allowing financial professionals to drive sustainable growth.

Rachel Curtiss: RCurtiss@docuphase.com



docuphase.com

BUILDING HIGH- PERFORMANCE TEAMS

Learn how one of the most successful coaches of our time brings people together in pursuit of excellence.

December 11 | 1:00 – 3:00 PM ET | Live, Online

What does it take to really bring a business to the next level of growth and opportunity? It takes incredible teamwork, and that means incredible coaching.

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FEATURING

Coach Mike Krzyzewski

Duke University
Men's Basketball Coach
Team USA Men's
Basketball Coach

Discover How to Lead the Coach K Way:

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- **With exceptional communication and transparency:** Fostering more open, honest conversations to build trust and gain followership.
- **With adaptability and resilience:** Embracing challenges while staying true to core values.
- **With empowerment and delegation:** Allowing team members to discover their own roles and strengths by sharing responsibilities.
- **With a commitment to excellence:** Setting high standards and striving for the best, always.

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BOOTH 711



FinQuery, formerly LeaseQuery, empowers 36,000+ professionals to optimize decisions in their top spending areas—leases, software subscriptions, and financial contracts—setting us apart in the market. Our award-winning AI-driven software minimizes risk, boosts efficiency, and cuts costs. Explore FinQuery's Platform for contract and spend intelligence, including solutions for contract management, specialized accounting ensuring compliance with ASC 842, IFRS 16, GASB 87 and GASB 96, and software management.

Jessica Cabrera: jessica.cabrera@finquery.com



finquery.com

BOOTH 1101



fintastic is an AI-fueled, next-generation Planning and Analysis platform with unmatched speed, scalability, flexibility, simplicity and performance. Built for mid-market and enterprise organizations, fintastic offers:

- Unlimited modeling using its revolutionary engine and intuitive language.
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- Permission-controlled workflows and collaboration tools to remove boundaries across organizations.
- Genuine, game-changing AI features that are paving the future path of planning.

Andrew Goldberg: andrew@fintastic.ai



fintastic.ai

BOOTH 510



FloQast is an Accounting Automation Platform created by accountants for accountants, enabling organizations to automate a variety of accounting operations. Trusted by more than 2,800 global accounting teams—including Twilio, Los Angeles Lakers, Zoom, and Snowflake—FloQast enhances the way accounting teams work, enabling customers to automate close management, account reconciliations, accounting operations, and compliance activities. With FloQast, teams can utilize the latest advancements in AI technology to manage aspects of the close, reduce their compliance burden, stay audit-ready, and improve accuracy, visibility, and collaboration overall. FloQast is consistently rated #1 across all user review sites.

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floqast.com

BOOTH 316



Focus Technology is a leading provider of IT solutions and services that help organizations achieve their business objectives and optimize their IT performance. Focus Technology offers a wide range of IT solutions, including cloud, data center, cybersecurity, managed services, and professional services. Focus Technology serves clients across various industries, such as healthcare, legal, manufacturing, and financial services. Focus is headquartered in Boston, MA, and services clients across New England and beyond.

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focustsi.com

BOOTH 719



FutureView Systems provides technology-enabled finance solutions to transform and empower finance functions rapidly. We combine integrated FP&A Software with a range of professional services spanning finance, accounting and business intelligence, leveraging technology to deliver value and drive strategic decision-making across organizations.

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futureviewssystems.com

BOOTH 819



Gatekeeper is the Vendor & Contract Lifecycle Management Platform (VCLM). Customers benefit from unrivaled visibility and control over their vendor and contracting processes, helping them drive extensive savings from their portfolios, whilst safeguarding their compliance with all applicable regulations and internal governance.

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gatekeeperhq.com

BOOTH 610



Growfin is purpose-built for B2B finance teams that deal with large invoice volumes to gain complete control over their collections process and radically reduce DSO.

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growfin.ai

BOOTH 505



HighRadius offers cloud-based autonomous software for the office of the CFO. More than 850 leading companies have transformed their order into cash, treasury, and record-to-report processes with HighRadius. Our customers include 3M, Unilever, Anheuser-Busch InBev, Sanofi, Engie GBS Solutions, Kellogg Company, Danone, and Hershey's. Autonomous software is data-driven software that continuously morphs its behavior to the ever-changing underlying domain transactional data. It brings modern digital transformation capabilities like artificial intelligence, robotic process automation, natural language processing, and connected workspaces as out-of-the-box features for the finance & accounting domain. HighRadius' Autonomous platform delivers measurable business outcomes such as DSO reduction, working capital optimization, bad-debt reduction, reduced month-end close timelines, and improved productivity in under six months.

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highradius.com

BOOTH 914



Hyperbots is a finance AI product company. We have a presence in 20 US states and dozens of CFOs as our partners. At Hyperbots, we are on a mission to free up humans from mundane and repetitive tasks in finance. Tasks such as invoice processing, 3-way/2-way matching, accruals, capitalization, GL mapping and updates, early payment discount decisions, procurement process intelligence, employee expense management, receivables, collections, collaboration with employees, vendors, and customers, are significantly transformed through Hyperbots' AI Assistants. Our AI assistants are an outcome of finance-specific applied AI research in NLP, Vision, Language Models, Recommenders, Intelligent Document Processing, Data Visualizations, and Conversational Technology domains. They are ready to deploy, easy to configure and come with in-built integrations with widely used ERP, CRM, and other applications.



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hyperbots.com

BOOTH 104



IQBackOffice offers world-class accounting services. We offer accounts payable, accounts receivable, and reconciliation services that leverage technology to drive efficiency and timely results while significantly reducing costs. Our Offsite Office service creates dedicated offshore accounting teams tailored to your specific needs. We provide access to top global talent and significant cost savings. In addition to our finance and accounting services, we partner with organizations to achieve a 5-day close.



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iqbackoffice.com

BOOTH 818



As a full-service IT partner with 30 years of experience providing managed services and other information technology solutions nationwide, our dynamic team of IT consultants is uniquely positioned and ready to support all of your technology needs. Our process-driven, customer-centric approach to technology is what sets us apart from other IT companies.



Mary Rodenberger: mary.rodenberger@itsolutions-inc.com

itsolutions-inc.com

BOOTH 102



Founded in 2017 by former tax partners, Keeyns is revolutionizing the way tax divisions operate. Keeyns makes tax processes smarter and more enjoyable, ensuring full control and compliance worldwide. Keeyns developed an intuitive solution that allows customers to collaborate seamlessly on one platform while securing the segregation of duties and tasks. Automated and customized workflows for all taxes and compliance dashboards in over 150 countries ensure clients are in control. When using Keeyns, prepare to work smart and sleep well!



Burt Gesner: ruben@keeyns.com

keeyns.com

WOMEN LEADERS CONNECT

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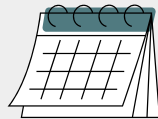
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BOOTH 100



KMK Ventures is a leading outsourced finance & accounting company. We can operate as your extended finance and accounting back-office & provide cost-effective solutions resulting in massive cost savings of upwards of 50%.

KMK Ventures: dev@kmkventures.com



kmkventures.com

BOOTH 716



LumiQ is a podcast app where CPAs can earn CPE credits on-the-go through engaging conversations with top business leaders.

Andrew Stoyanoff: andrew.stoyanoff@lumiqlearn.com



lumiqlearn.com

BOOTH 305



Merchant Advocate helps businesses reduce the cost of accepting credit cards, without switching processors. Our team of analysts will perform a FREE analysis of your statement to uncover any hidden fees, coding errors, or inflated rates. We negotiate on your behalf to eliminate those fees and monitor your account every month to ensure you keep saving. There are no upfront costs and no obligation.

Mark Sage: msage@merchantadvocate.com



merchantadvocate.com/FATE

BOOTH 301



Mesh Payments is the first truly global and unified spend and travel management platform —with corporate cards, expense management, reimbursements, and travel all in one place. Mesh simplifies the complex process for finance teams overseeing global expenditures across multiple entities and currencies. Over 1,500 organizations trust Mesh to streamline their global spending capabilities, accounting processes, and financial operations. We invite you to explore how Mesh can transform your travel and expense management by visiting our booth or checking out our website.

Samantha Kramer: samantha.kramer@meshpayments.com



meshpayments.com

BOOTH 405



Nacha governs the thriving ACH Network, the payment system that drives safe, smart, and fast Direct Deposits and Direct Payments with the capability to reach all U.S. bank and credit union accounts. There were 31.5 billion ACH Network payments made in 2023, valued at \$80.1 trillion (about \$250,000 per person in the US). Through problem-solving and consensus-building among diverse payment industry stakeholders, Nacha advances innovation and interoperability in the payments system. Nacha develops rules and standards, provides industry solutions, and delivers education, accreditation, and advisory services.



Michael Kahn: mkahn@nacha.org

nacha.org

BOOTH 114



Navan is the all-in-one solution that makes travel and expense easy so you can focus on being there, not getting there. Say goodbye to spending hours on the phone trying to change your flight or saving stacks of receipts to manually input expenses. From EAs and finance teams to travel managers and employees, Navan empowers people to concentrate on the things that matter most to them—all while providing companies with real-time visibility, savings, and control.



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BOOTH 715



Nilus was founded with a simple mission: to make cash simple—to help your finance, accounting, and treasury teams make smarter decisions with actionable insights. With this goal in mind, we set about creating a platform that connects all your cash data in one place: banks, payment systems, billing, ERPs, and everything else. We then added a layer of the latest AI to analyze this data, with the aim of saving teams countless hours of manual work. Finally, we started surfacing insights that would help finance teams make better decisions with their cash. Leading finance teams at companies like Resident, Taboola, and Alloy rely on Nilus to make decisions that shape the future of their business. From cash positioning to forecasting and everything in between, we're building a new standard for treasury.



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nilus.com

BOOTH 411



Nominal is the ERP co-pilot that transforms manual and tedious accounting tasks. Our AI-driven solution bridges the gaps between traditional ERP systems and multi-entity companies' needs, accelerating month-end closing by 20% to 30%, while also drastically reducing errors and manual interventions. Nominal automates multi-entity consolidation, lease accounting, waterfall reporting, and complex journal entry processes—all without the need for lengthy migrations or costly customizations.



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nominal.so

BOOTH 419



Founded in 1982 and headquartered in Buffalo, NY, Nova is a leading third-party administrator of self-funded employee benefit programs. Nova offers a comprehensive array of services, including medical, dental, vision, and reimbursement account administration. Additionally, Nova provides award-winning, in-house, integrated medical management programs, and offers best-in-class partnerships, customized solutions, and personalized service leveraging data analytics.

Todd Martin: tmartin@novahealthcare.com



novahealthcare.com

BOOTH 105



OneSource Virtual (OSV) delivers in-tenant technology and expert services to automate the administrative and transactional tasks of Workday payroll, taxes, payments, and benefits. With over 1,000 customers and a 95% customer retention rating, OSV is the leading exclusive provider of Workday Business-Processes-as-a-Service.

Brianna Swope: bswope@onesourcevirtual.com



onesourcevirtual.com

BOOTH 701



For more than 25 years, Oracle NetSuite has helped organizations grow, scale, and adapt to change. NetSuite provides an integrated system that includes financials/Enterprise Resource Planning (ERP), inventory management, HR, professional services automation and omnichannel commerce, used by more than 40,000 customers in 219 countries and dependent territories.

Emily Pearson: emily.houghton@oracle.com



netsuite.com

BOOTH 805



Payhawk is a leading spend management solution for domestic and international businesses throughout the US, the UK and Europe. Combining company cards, reimbursable expenses, accounts payable, and seamless accounting software integrations into a single product, Payhawk makes business payments easy—for everyone. With offices in London, Berlin, Barcelona, Paris, Amsterdam, Vilnius, Sofia, and New York, Payhawk's diverse customer base includes top names like Lufthansa, Babbel, Vinted, State of Play, and Decathlon.

Maisie Richardson: maisie.richardson@payhawk.com



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What does it take to really excel in the role of CFO?

Secrets of Rockstar CFOs Podcast - your guide to mastering the challenges and opportunities of financial leadership!



Whether you are a seasoned CFO or just starting out in the field, you will find something useful in this podcast. Welcome to Secrets of Rockstar CFOs, a practical and actionable resource for CFOs seeking to advance their careers. This is your friendly and helpful guide to master the challenges and opportunities of financial leadership.

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It's imperative that even in your role as a CFO, you have to adopt a growth mindset. You can't be the person that puts the brakes on everything. You need to be part of the solution.

Host
Jack McCullough
President, CFO Leadership Council



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BOOTH 514



Pigment is a business planning platform that provides organizations with the tools needed to intuitively and intelligently build and adapt strategic plans. Industry-leading companies like Klarna, PVH, Webhelp, Figma, and Poshmark use Pigment every day to quickly get an accurate picture of their business, make better decisions, and focus more on executing strategy in a rapidly changing world.

Kelland Huang: kelland.huang@gopigment.com



pigment.com

BOOTH 1104



Planful transforms the way you plan, close, consolidate and report so you can drive more impactful decisions across your business. Align every squad, inform every move, and change direction using a platform designed to improve your financial performance.

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planful.com

BOOTH 1103



Praxi is a groundbreaking accounting platform that empowers teams to achieve unmatched efficiency and accuracy by seamlessly converting both standard and non-standard documents into actionable checklists, memos, and journal entries. Regardless of the complexity or industry, Praxi delivers immediate value with its pre-built and configurable workflows for revenue recognition, lease accounting, financial instruments, and more. Praxi minimizes costs while maximizing revenue, transforming the way you work.

James Kinda: james.kinda@praxi.io



praxi.io

BOOTH 714



Ambitious finance leaders use Prophix to drive progress. By improving the speed and accuracy of decision-making, Prophix's Financial Performance Platform elevates the talents of finance teams to do their best work. Crush complexity, reduce uncertainty, and illuminate insights with access to best-in-class AI insights and planning, budgeting, forecasting, reporting, and consolidation functionalities.

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prophix.com

BOOTH 901



Ramp is the ultimate platform for modern finance teams. From corporate cards and expense management to bill payments and procurement, Ramp's all-in-one solution is designed to automate finance operations and build healthier businesses. Over 25,000 businesses have switched to Ramp to save an average 5% and close their books 8x faster.

Alexandra Grossi: agrossi@ramp.com



ramp.com

BOOTH 619



RightRev is a powerful revenue recognition automation right out of the box. Our software is embedded with action-oriented features designed to make a difference for accounting teams. From contract changes to subscription renewals, our trusted platform tracks all your revenue contracts for streamlined revenue recognition and management reporting compliant with ASC 606 and IFRS 15.

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rightrev.com

BOOTH 515



Rippling Spend offers finance organizations a comprehensive spend management solution, consolidating payroll, expenses, travel, and accounts payable into a unified platform. It eliminates the need for multiple systems and manual reconciliation, ensuring a seamless integration with your existing accounting software. It simplifies the management of permissions and policies, enhancing visibility and providing deep insights into your financial operations for strategic decision-making.

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rippling.com

BOOTH 318



The Routable Accounts Payable Automation platform offers the most efficient and robust solution to streamline and scale the end-to-end AP process. With automated invoice capture and processing, flexible payment options, and seamless vendor management, Routable reduces manual payment tasks by 80% so finance teams can focus on impact. Routable's deep ERP integrations and configurable approval workflows support complex business requirements with ease. Routable eliminates compliance headaches through detailed audit trails, role-based access, and vendor risk checks. All with an average savings of 30%. AP Automation, solved.

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BOOTH 518



Sage exists to knock down barriers so everyone can thrive, starting with the millions of small and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to make work and money flow. By digitizing business processes and relationships, our digital network connects SMBs, removing friction and delivering insights.

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sage.com

BOOTH 1105



SC&H is a national consulting and financial services firm driving your business, technology, and teams forward. From strategic advice that propels growth to insightful data that shapes your future, we're humanizing the interactions that matter most to you. Since 1991, we've ditched transactional engagements for rewarding experiences that meet the needs of the middle-market, Fortune 500s, SMBs, and high-net-worth individuals we serve.

Kate Mills: kmills@schgroup.com



schgroup.com

BOOTH 415



SoftCo is a fast-growing global Procure-to-Pay (P2P) and Accounts Payable (AP) Automation technology company. SoftCo's AI-powered automation technology delivers unrivalled straight through processing rates, ensuring industry leading ROI. Operating from the US, Finland, the UK, and Ireland, SoftCo has over a million users worldwide with customers including PwC, Snap-on, Volkswagen, Primark, Logitech, and the Finnish Government. SoftCo is ISO27001 certified, SOC 1 & 2 audited, a Microsoft IP Co-Sell Certified Partner, an AWS Advanced Technology Partner, and is integrated with over 200 ERP systems.

Paul Tighe: paul.tighe@softco.com



softco.com

BOOTH 611



SOFTRAX is a provider of industry-leading, cloud-based revenue management and billing solutions that can transform the top and bottom line. The SOFTRAX Revenue Management System is the only solution that automates order management, best-in-class billing, contract renewal management, and complex revenue recognition capabilities in one system. With SOFTRAX, you gain the power of a revenue lifecycle solution that meets the demands of complex recurring and consumption billing and standards such as ASC 606 and IFRS 15.

Ashley Tolfo: ashley.tolfo@softrax.com



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Elevate Your Finance Skills with Practical Generative AI Training

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BOOTH 816



SquareWorks Consulting is a NetSuite partner focused on elevating its customers' experiences with exceptional automation solutions and consulting services. Our products include Automate, a NetSuite-native financial automation platform that enhances and takes NetSuite to the next level. We also provide exceptional consulting services and partner with our customers to deliver high-quality NetSuite implementations, optimization services and ongoing support. We believe in building long-term partnerships with customers to enable their success, and that starts with our team. We strive to enable our employees to achieve professional excellence by providing training and development resources, a diverse and inclusive workplace, a fully remote working environment, a healthy work/life balance, as well as other wellness benefits and programs. By embracing this mentality, we can put our best foot forward every day to help our customers succeed.

Liz Bernardo: Liz.bernardo@squareworks.com

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BOOTH 309



Tipalti is a global finance automation company helping finance teams drive business growth by automating and streamlining accounts payable, mass payments, procurement and employee expenses in one connected suite. Over 4,000 growth-minded companies globally use Tipalti to remove the complexity, cost and risk from time-consuming financial workflows and efficiently and securely pay millions of suppliers across 196 countries, 6 payment methods, and 120 currencies.

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tipalti.com

BOOTH 103



Trintech gives people time back for what matters most. Our cloud-based platform and solutions enable over 4,200 clients worldwide to lead productivity transformation across their finance and accounting organizations—driving efficiencies, ensuring accuracy to mitigate risk, and empowering strategic decision-making. Make time count with Trintech.

Erica Reed: erica.reed@trintech.com

trintech.com

BOOTH 1100



Tropic Intelligent Spend Management solution helps customers gain efficiency and savings by combining simple, user-friendly spend management capabilities and unbiased software supplier intelligence in one solution.

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tropicapp.io

BOOTH 310



Trullion is an AI-powered accounting platform that automates repetitive, labor-intensive tasks for CFOs, Accountants, and Auditors to ensure hassle-free compliance. Trullion unifies the unstructured and structured worlds of accounting into one secure platform, giving you back your time, with confidence.

Danielle Tin: danielle@trullion.com



trullion.com

BOOTH 511



Trustmi is the only end-to-end payment security solution helping businesses protect their bottom line by eliminating losses from cyberattacks, internal collusion, and human error. Our flexible and modular solution offers businesses full control to use only the tools they need for securing their payment processes and managing vendors. Trustmi is the preferred solution for leading global businesses like Colgate-Palmolive and CNA Insurance that can now successfully secure their payments, avoid losses, and grow their bottom line. Founded in 2021 by Shai Gabay and Eli Ben Nun, Trustmi is headquartered in Tel Aviv with an office in New York.

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trustmi.ai

BOOTH 810



Unit4's next-generation enterprise resource planning (ERP) solutions power many of the world's mid-market organizations, bringing together the capabilities of Financials, Procurement, Project Management, HR, and FP&A to share real-time information, and deliver greater insights to help organizations become more effective. By combining our mid-market expertise with a relentless focus on people, we've built flexible solutions to meet customers' unique and changing needs. Unit4 serves more than 5,100 customers globally across several sectors including professional services, nonprofit and public sector, with customers including Southampton City Council, Metro Vancouver, Buro Happold, Devoteam, Save the Children International, Global Green Growth Institute, and Oxfam America.

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unit4.com

BOOTH 615



Validation Institute provides unbiased, data-driven insights on health care solutions and services. The Institute validates performance claims made by solution providers and educates purchasers to drive transparency in the marketplace and maximize cost-savings. By validating these performance claims, Validation Institute guides purchasers in choosing the solutions that best meet the needs of their populations while improving outcomes, strengthening accountability, and saving costs.

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validationinstitute.com

BOOTH 201



Velosio is a change agent. Our cloud application services and solutions, our experts and proven methodologies empower our clients to chart their own course to achieving more, removing obstacles, and pursuing their most ambitious goals at a pace that is right for them. Velosio specializes in ERP & CRM, Data Fabric, Analytics & Automation, Cloud & AI Managed Services.

Michael DeGeeter: mdegeeter@velosio.com



velosio.com

BOOTH 315



Vendori is a no-code CPQ platform that enables our customers to manage complex transactions, product catalogs, pricing models, and deal structures with ease. Our embedded integrations and dynamic quote templates allow customers to onboard in minutes, not months—no consultants, no ongoing service engagements.

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vendori.com

BOOTH 705



For growing businesses that need to accomplish more with less, Versapay's Accounts Receivable Efficiency Suite simplifies the invoice-to-cash process by automating invoicing, facilitating B2B payments, and streamlining cash application with AI. Owned by Great Hill Partners, Versapay's employee base spans the U.S. and Canada with offices in Atlanta and Miami. With 10,000 customers and 5M+ companies transacting, Versapay facilitates 110M+ transactions and \$170B+ in payments volume annually.

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versapay.com

BOOTH 509



Vertice is a spend optimization platform helping customers save 20% to 30% on annual software spend whilst boosting productivity. With a pricing database of 15,000+ vendors and dedicated expert buyers, we ensure that you are paying a fair price for your software and negotiate renewals and new purchases on your behalf. We guarantee savings that are at least as much as you pay, giving you money back if we don't deliver.

Julia Blanco: julia.blanco@vertice.one



vertice.one

BOOTH 314



Vic.ai is pioneering the use of AI to help companies unleash the potential for positive impact within finance departments everywhere. Our AI-first platform autonomously ingests and processes invoices, routes approvals, and sends payments — acting as your next accounting superstar. By maximizing productivity and eliminating financial waste to achieve sustainable ROI, AP teams are freed to focus on the future and more meaningful aspects of their work. Using Vic.ai, our 10,000+ corporate finance and accounting clients have already processed over a billion invoices and achieved nearly \$200 million in cost savings. Vic.ai is jointly headquartered in Miami and Oslo, Norway.

Monica Ortiz: monica.ortiz@vic.ai



vic.ai

BOOTH 811



WEX (NYSE: WEX) is the global commerce platform that simplifies the business of running a business. WEX has created a powerful ecosystem that offers seamlessly embedded, personalized solutions for its customers around the world. Through its rich data and specialized expertise in simplifying benefits, reimagining mobility and paying and getting paid, WEX aims to make it easy for companies to overcome complexity and reach their full potential.

Tori Olson: tori.olson@wexinc.com



wexinc.com

BOOTH 205



Adapt to a dynamic workforce. Workday offers a comprehensive workforce solution to help you control your total labor costs and provides frontline manager experience for your workforce.

Diane Glasheen: diane.glasheen@workday.com



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BOOTH 101



Xero is powerful cloud accounting software that improves efficiencies across your practice. With all client data stored on a single unified ledger, you and your clients can easily access and collaborate on the same set of books. Xero's advisor tools and automation solutions reduce time-consuming manual tasks and put data entry on autopilot. Work faster and more efficiently than ever before with Xero.

Brian Gerson: brian.gerson@xero.com



xero.com

BOOTH 1113



Yooz provides the smartest, most powerful, and easiest-to-use cloud-based E-invoicing and Purchase-to-Pay (P2P) automation solution. It delivers unmatched savings, speed, and security with affordable zero-risk subscriptions to more than 5,000 customers and 300,000 users worldwide. Yooz's unique solution leverages Artificial Intelligence to deliver an amazing level of automation.

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getyooz.com

BOOTH 1115



Welcome to Zoey – your new Business Operating System. Zoey empowers B2B wholesalers, distributors, and manufacturers to move online effortlessly, with all essential sales tools built-in—no add-ons needed!

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Joseph Santini: joseph@zoey.com



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As a Chief Financial Officer, your insights and leadership are essential in guiding your organization toward growth and financial success.

The CFO Network offers you a unique opportunity to engage with a community of peers in a collaborative and confidential environment. This is where you can share experiences, tackle challenges, and gain innovative insights, enhancing your role as a strategic influencer.

Unlock exclusive benefits with The CFO Network:

- Become a trusted advisor to your CEO and Board.
- Develop metrics for increased profitability.
- Reduce healthcare and operational expenses.
- Boost finance and accounting team performance.
- Explore competitive strategies and M&A.
- Make confident technology investments.
- and more.



THE
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A CHIEF EXECUTIVE GROUP COMMUNITY

Elevate your role as a CFO.
Join peers in a dynamic learning environment. Contact The CFO Network at (201) 323-3716 or visit TheCFONetwork.org/FATE24 today.

NOTES

Develop and sharpen your high-potential, mid-level managers' strategic leadership capabilities

Next Level Leaders Program

Designed for your up and coming leaders, the Next Level Leaders Seminar, by Chief Executive Network, is a 3-day intensive leadership training. Your Next Level Leaders immerse themselves in a leadership curriculum to learn about themselves as leaders and develop their own personal leadership philosophy while also gaining abilities for the betterment of your company.

Tangible Return on Investment

Developing Next Level Leaders in your company provides many benefits:

- Advanced Leadership Skills: Vision, Alignment and Execution
- Difficult Conversations That Make a Difference
- Creative Abrasion: Positively Managing Change
- Developing Critical Thinking Skills
- Managerial Decision-Making—Managing the Tough Choices

► Upcoming Program Dates:

OCTOBER 7 - 28, 2024

| Online

JANUARY 6 - 27, 2025

| Online

FEBRUARY 26 - 28, 2025

| Nashville, TN



For more information, go to:
NextLevelLeadersSeminar.com

NEXT LEVEL
LEADERS

CHIEF EXECUTIVE NETWORK

TASTE OF NEW YORK RECEPTION

October 29, 4:30 – 6:00 pm | Exhibit Hall Floor

105	OneSource Virtual	Big Apple Cider Martini
301	Mesh	Manhattan
309	Tipalti	Ice Cream Cart
310	Trullion	Trullion Lemonade Lab, Crafted By AI
316	Focus Technology & Arctic Wolf	Arancini Balls
318	Routable	Fizz-cally Responsible Cocktail, Month-End Mule
514	Pigment	Soft Pretzels
515	Rippling	Magnolia Bakery
518	Sage	Black And White Cookies
701	Oracle NetSuite	Popcorn
711	FinQuery	New York Cannolis
718	DocuPhase	Prosciutto and Burrata
914	Hyperbots	Pastrami Sandwiches, Double Chocolate Cake
1100	Tropic	Cheesecake Bites
1104	Planful	Chicken Satay

RECEPTION STATIONS



Beer & Wine



Hot Dog Stand



NY-Style Pizza



Crudité Station

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