



FINANCE & ACCOUNTING technology expo

PRODUCED BY



Attendee Guide

November 13-14, 2025
Javits Center | New York City

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Welcome to the 2nd Annual FATE: Finance & Accounting Technology Expo!

We're thrilled to host you for another incredible year at FATE, where finance leaders, innovators, and solution providers come together to shape the future of the finance function.

What began as a simple idea—CFO Leadership Council members sharing their tech stacks—has evolved into a powerful movement. From that first conversation grew a community of forward-thinking finance executives determined to cut through the noise, make smarter technology choices, and lead digital transformation in their organizations.

This year's event builds on that momentum. Across two days of immersive demos, interactive theater sessions, and peer-driven discussions, you'll discover how today's most effective finance teams are leveraging technology to drive agility, insight, and impact.

FATE is more than a showcase—it's a community. Take this opportunity to connect with fellow finance leaders, exchange real-world lessons, and test-drive the innovations redefining our profession. Whether you're here to refine your automation roadmap, explore emerging AI applications, or benchmark your systems against peers, we're confident you'll leave with actionable ideas and valuable connections.

A sincere thank you to our sponsors, speakers, and partners for helping bring this experience to life—and to you for being part of the next chapter of FATE. Your participation fuels this growing community and ensures we continue to push the boundaries of what's possible in finance.

We're grateful you're here. Let's make it our most transformative year yet.



RD Whitney

RD Whitney
President, Chief Executive Group,
parent company to
CFO Leadership Council
rd@cfolc.com

Event App

To access the event app, which has the full schedule, speaker profiles, virtual exhibit booths and more, follow the steps below:

1. Download the **CFO Leadership Council App** from the Apple App Store or Google Play
2. Log in using your registration email and create a password
3. Complete your profile to start networking
4. **Enable App Notifications** for the latest on-site announcements.

Event Survey



Your feedback is extremely important to us. Please fill out the survey by scanning the QR code to let us know how we did!

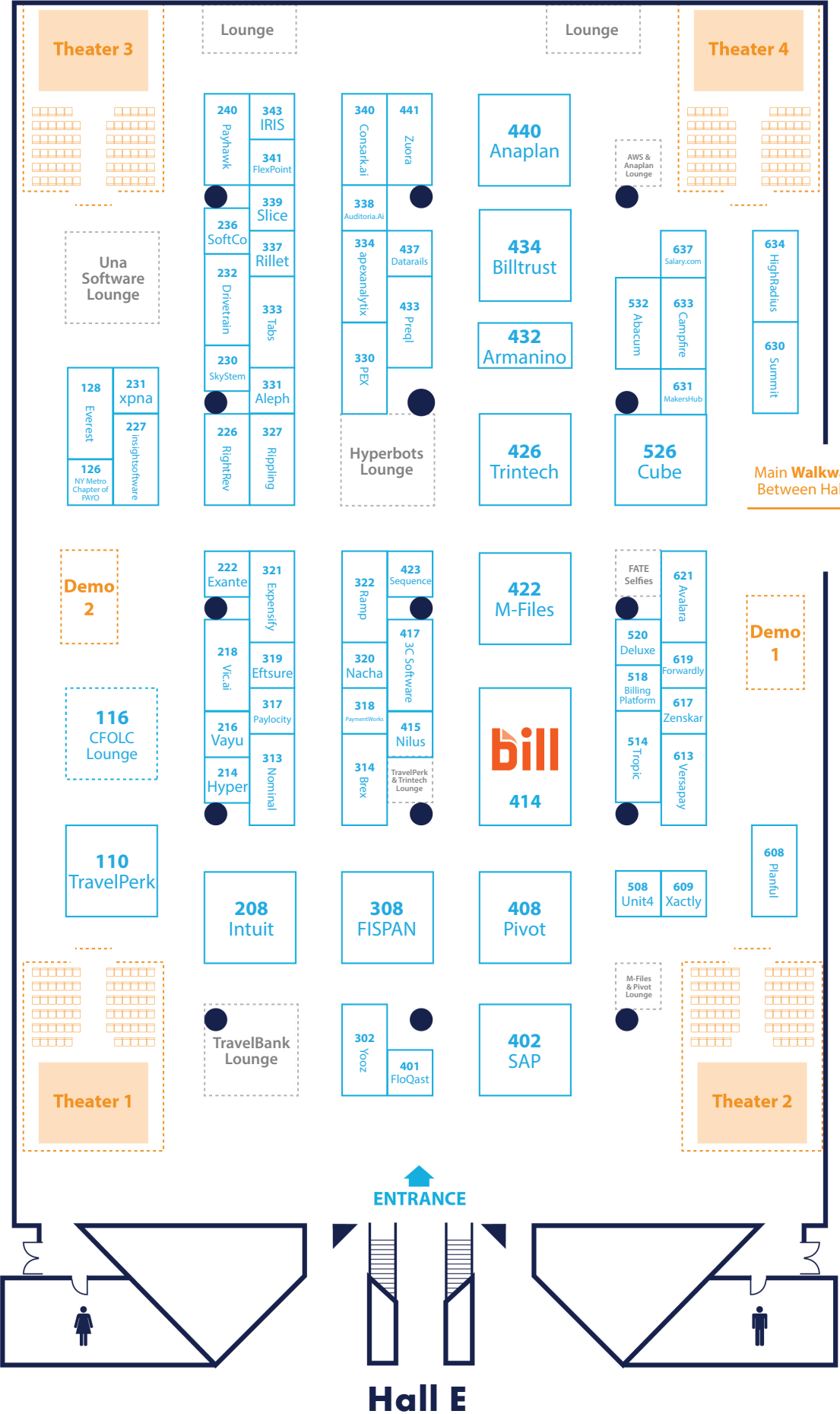


Network: FATE
Password: TravelBank

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Floor Map



SAVE THE DATE

November 18-19, 2026

Javits Center | NYC



FATE, the largest gathering of finance and accounting technology professionals in the country, is returning in 2026 bigger than ever!























Registration is open on-site:
Visit the CFOLC Lounge #116

Register online at
CFOLeadership.com/FATE/2026-Reg

Featuring **Barbara Corcoran**
Shark on ABC's Shark Tank, Motivational Speaker, Executive Coach,
Podcast Host, Author, Founder of The Corcoran Group



	THEATER 1	THEATER 2	THEATER 3	THEATER 4	THEATER 5
9:00 am	<div><div><div><div>KEYNOTE STAGE</div><div>KEYNOTE Mastering the Three Ps: People. Process. Product.</div><div>Marcus Lemonis TV Personality, Entrepreneur, Advocate & Philanthropist</div></div></div><div>For Marcus Lemonis, success in business doesn't come from luck—it comes from discipline, clarity, and an unrelenting focus on what he calls the "3 Ps": People, Process, and Product.</div></div>				
10:15 am	<div>Beyond the Bottlenecks: Building Smarter Finance Teams With AI-Powered Automation</div> <div>bill</div>	<div>Finance at the Frontier: From Automation to Agentic ERP</div> <div>Velosio</div>	<div>An LLM for the CFO Office</div> <div>Hyperbots</div>	<div>The Future of Finance is Leaner, Faster, and More Efficient</div> <div>FISPAN</div>	<div>Drive Down Spend with Context and Control</div> <div>ramp</div>
10:55 am	<div>Precision at Scale—Using AI to Optimize Outreach Timing, Frequency, and Segmentation in Accounts Receivable</div> <div>billtrust</div>	<div>T&E Policy Failures Are Costing You—Fix Them Fast</div> <div>TravelBank</div>	<div>Beyond Forecasting: Finance as a Driver of GTM Strategy</div> <div>Brex</div>	<div>Optimizing Reporting, Analytics, and AI to Strengthen Financial Resilience</div> <div>ORACLE NetSuite</div>	<div>Transforming Data into Strategic Value: Building a Scalable, Compliant, and Actionable Data Strategy with NetSuite</div> <div>bakertilly</div>
11:35 am	<div>Cash Flow Without Friction: Strategies for AR Optimization</div> <div>VERSAPAY</div>	<div>Multi AI Agent Collaboration for F&A</div> <div>Hyperbots</div>	<div>What AI Actually Means for Finance Teams</div> <div>Expensify</div>	<div>Top 5 Priorities for CFOs Driving Digital Change</div> <div>SAP</div>	<div>Stop Closing the Books. Start Opening Strategy.</div> <div>Qubittron</div>
12:15 pm	<div>Lunch Break brought to you by</div> <div>bill</div> <div>ORACLE NetSuite</div>				
1:00 pm	<div>Reimagine FP&A with Gen AI and Predictive Analytics</div> <div>una</div>	<div>Uncovering the Hidden Drivers of Profitability—Customers, Costs and the Value Chain</div> <div>3C SOFTWARE</div>	<div>From Cost Center to Control Tower: Rethinking the Finance Function in the Age of Automation</div> <div>PEX</div>	<div>30 Days to AI Fluency: The CFO's Blueprint for Finance Transformation</div> <div>Drivetrain</div>	<div>AI Can't Replace YOU: Mastering the Balance Between People and Tech</div> <div>cube</div>
1:40 pm	<div>Smarter, Faster, Stronger: The AI-Driven ERP Evolution</div> <div>armanino</div>	<div>Scaling Smart: How Tech Companies Streamline Their Tech Stack</div> <div>SQUIRE TECHNOLOGY</div>	<div>From Manual to Momentum: Empowering Finance with O2C Automation and Strategic Insight</div> <div>ZUORA</div>	<div>The 5% Club: How CFOs Unlock ROI with Domain-Specific AI</div> <div>VIC.AI</div>	<div>The AI Advantage: Building a Smarter, Scalable Finance Tech Stack</div> <div>tipalti</div>
2:20 pm	<div>Fighting Fraud in AP: Risks, Red Flags & Remedies</div> <div>yooz</div>	<div>What Does It Mean to Be AI-Ready?</div> <div>PREQL AI</div>	<div>AI Meets Tax & Regulatory Complexity: A New Competitive Edge</div> <div>Avalara</div>	<div>From Firefighting to Forecasting: Taking Control of SaaS Spend</div> <div>tropic</div>	<div>Why Aligning Finance and Accounting is Critical to Your Business's Agility</div> <div>Anaplan</div>
3:00pm	<div>The AI Revolution for CFOs: Practical Applications and Future Opportunities</div> <div>insightsoftware</div>	<div>FP&A: From Excel to AI—What the Journey Looks Like</div> <div>una</div>	<div>Accelerating Cash Flow—Navigating Payment Challenges During Economic Uncertainty</div> <div>quadient</div>	<div>30-Day Roadmap for Implementing AI to Supercharge Finance</div> <div>RIPPLING</div>	<div>Ditch Your Copilots: Why Accounting AI Must Be Deterministic by Default</div> <div>finnt</div>
3:40 pm	<div>Less Busywork, More Impact: Transform Workflows With Intelligent Automation</div> <div>M-Files.</div>	<div>Your Infrastructure is Showing: Tales from Behind the Finance App Curtain</div> <div>SUMMIT</div>	<div>The Corporate Card Switching Dilemma</div> <div>Payhawk</div>	<div>Automating Variance Analysis with GenAI: From Data to Ready Commentary</div> <div>Consark.ai</div>	<div>Revealed: The Hidden Tax on Company Growth</div> <div>travelperk+</div>
4:20 pm	<div>Smarter Month-End with AI: Automate, Accelerate, and Eliminate Errors</div> <div>TRINTECH</div>	<div>Beyond the Hype: How To Drive Real Value with AI</div> <div>Abacum</div>		<div>AI-powered CFO: Leveraging Technology for Operational Excellence and Strategic Growth</div> <div>INTUIT Enterprise Suite</div>	<div>State of Spend: What Spending Trends Reveal About Our AI-Enabled Future</div> <div>Zip</div>
5:00 pm	<div><div>KEYNOTE STAGE</div><div>PITCH STAGE AWARDS</div><div><div><div>KEYNOTE STAGE</div><div>KEYNOTE Spreadsheets and Shenanigans</div><div>Your Average Finance Bro Finance & Accounting Comedian; @youraveragefinancebro</div></div></div></div> <div>Stick around for the</div> <div><div>Superhero Reception</div><div>5:30-6:30 pm</div></div> <div>SPONSORED BY</div> <div>INTUIT Enterprise Suite</div>				

	THEATER 1	THEATER 2	THEATER 3	THEATER 4	THEATER 5
9:00 am	<div><div>KEYNOTE STAGE KEYNOTE Driving a Championship Culture Matt Doherty Motivational Speaker, Former Head Coach at Notre Dame and North Carolina</div></div>		<div>Matt Doherty is a nationally recognized motivational speaker, best-selling author, and media personality. He guides corporations, C-suite managers, sales executives, and business and sports coaches to develop their leadership skills and team dynamics.</div>		
10:15 am	<div>Making the Business Case for AP Automation in NetSuite: Prevent Fraud, Improve KPIs and Get Ahead of the Game </div>	<div>T&E Policy Failures Are Costing You—Fix Them Fast </div>	<div>Future Proofing your Enterprise through AI-Powered Cloud ERP </div>	<div>Finance Leadership in the Age of AI </div>	<div>State of Spend: What Spending Trends Reveal About Our AI-Enabled Future </div>
10:55 am	<div>AI in Accounting and Finance: Risk, Reward & the Road Ahead </div>	<div>Beyond the Bottlenecks: Building Smarter Finance Teams With AI-Powered Automation </div>	<div>How to Get the Most Out of Your ERP with a Procurement Platform </div>	<div>Introducing Agentic Performance Management: Accounting That Runs Itself </div>	<div>Embedding Compliance into the Daily Finance Workflow: Real-Time Reporting Controls & Alerts </div>
11:35 am	<div><div>KEYNOTE STAGE LUNCH KEYNOTE MBA for Lunch Jack McCullough President & Founder, CFO Leadership Council</div></div>		<div>A conversation facilitated by Ranga Bodla, Head of Industry Marketing at NetSuite, about Jack McCullough's latest book <i>MBA for Lunch</i>.</div>		
12:15 pm	<div>Identifying Cost Efficiency Through a Payments Strategy </div>	<div>AI Agents for Finance & Accounting: Lessons from 3,000+ Finance Transformations </div>	<div>From Manual to Modern with a 5x Faster Close </div>	<div>Streamlining Travel and Expense Management with AI </div>	<div>15 Data Points to Identify and Prevent Payment Fraud </div>
12:55 pm	<div>The CFO as AI Buyer: Building Smarter Systems, Not Hype Cycles </div>	<div>From Compliance to Growth Catalyst: How AI is Rewriting the Rules of Finance </div>	<div>How Resilient Finance Leaders Turn Tech + Talent into Impact </div>		<div>Closing the Gap: How AI Agents Streamline Billing, Collections, and Revenue Recognition </div>
1:35 pm	<div><div>KEYNOTE STAGE KEYNOTE Words Are Your Most Powerful Weapon: Communication Strategies from Inside the Secret Service Evy Poupouras Former Secret Service Special Agent and Interrogator</div></div>		<div>Success in work and life comes down to one thing: mastering the art of communication and Evy Poupouras will teach you how to do it like a pro.</div>		

Win a \$500 Prize

Visit the CFOLC Lounge #116 to enter for your chance to win one of four \$500 prizes:

The Hero's Getaway

Train like a Hero, Recover like One Too

Recharge & Rise Wellness Pack

A Universal Adventure



Winners announced at closing keynote on November 14. Must be present to claim your prize.

Thank you to our Marketing Partners



















In these concise, 15-minute sessions, solutions providers walk attendees step-by-step through products and features that straighten out the knottiest finance & accounting automation challenges.

	DEMO 1	DEMO 2	DEMO 3	DEMO 4
10:40 am	Yooz From chaos to clarity with Yooz: Automate AP + vendor statement reconciliation	3C Software Calculate and simulate cost and profit outcomes that matter	Navan Streamline travel and expense management—from bookings to books	Intuit Gain real-time visibility, accelerate strategic growth, and reach operational excellence with our AI-powered ERP
11:05 am	Trintech Zero-touch journal entry reconciliation using AI + workflow hints	Preql Solve the problem of fragmented, unreliable data that slows down your finance team	Cube FP&A your way: The future of forecasting—flexible, unified, intelligent	Expensify Handle reimbursements, card reconciliation, and travel—all at the speed of chat
11:30 am	BILL Delete the busy—free finance from low-value manual work	Tropic Stop overpaying for SAAS, automate the admin and save big on SAAS spend	Campfire Close fast and scale smarter with next-gen ERP	Charted Eliminate manual AP touchpoints in NetSuite with AI-powered workflows
11:55 am	Armanino From data dump to decision engine—empower your ERP with AI	Ramp Manage expenses, reimbursements, and travel—all in a single workflow	NetSuite Drive faster, sharper reporting with AI-powered financial consolidation	Zip Unlock faster AP cycles by starting upstream with intelligent intake
12:15 pm	Lunch Break			
1:10 pm	Billtrust AI chatbot delivers instant, flexible AR insights	M-Files Automate workflows, find and organize files & information instantly, with compliant, intelligent content management	TravelBank Customize and export data to monitor spend and compliance	Baker Tilly Subscription sales-to-cash transaction processing and trend analysis
1:35 pm	Summit Prevent your financial app from crashing when you need it most	Anaplan Data-driven decisions: The modern AI finance analyst in action	Hyperbots Eliminate manual F&A effort and enhance decisions via agentic AI	Quadient Software Improve cash flow, reduce DSO and AR aging with invoice-to-cash finance automation
2:00 pm	Abacum Turn complexity into clarity with real-time financial & operational data all in one place	FISPAN Streamline finance operations by integrating banking directly into your ERP, eliminating fragmented tools and reducing AP automation complexity and costs	TravelPerk Manual travel & spend slows business—TravelPerk automates it	Qubittron Close the books faster with agentic AI in SAP and beyond
2:25 pm	Planful Embedding AI assistants to boost collaboration, speed planning, and automate tasks—freeing finance to focus on strategy	PEX Eliminate receipt-chasing and save 8 hours a month closing the books	Una Software Replace manual input and stale assumptions with real-time revenue and operational data to better forecast	Tabs Get paid faster and reduce DSO with AI agents that automate billing and revenue workflows
2:50 pm	Versapay Accelerate cash flow by eliminating AR inefficiencies	Consark.ai Make transaction matching autonomous—let finance handle exceptions, not chaos	Squire Technology Unify your finance stack: Automate subscription billing, revenue recognition, and reporting with Netsuite + SuiteCentral	RightRev Automate complex revenue recognition for growing businesses with confidence
3:15 pm	SAP Optimize inefficient and fragmented closing processes with automation and intelligence	Drivetrain 10x your FP&A team's strategic impact with AI-native planning & reporting	TravelBank Stop the leakage: How to set and update T&E policy to enforce adherence	apexanalytix Minimize supplier risk with touchless onboarding, risk management and audits
3:40 pm	Avalara From question to clarity—fast, AI-driven tax compliance	Zuora Streamline order to cash to drive accuracy and support new GTM models	Pivot Centralize all spend to unlock financial clarity and accelerate decision-making	Everest Systems Close faster. Change safely. Finally, ERP that keeps up.
4:05 pm	Finnt From chaos to close: How to leverage AI to produce deterministic-by-default, audit-ready journals from any data	Vic.ai Smarter invoice processing, seamless bill pay—powered by purpose-built AI	Velosio Turning modern data into AI-powered insights	Tipalti End-to-end AP automation for unprecedented efficiency and control
4:30 pm	Payhawk Unlock real-time visibility and proactive spend control on your existing bank issued corporate cards	Rippling See how Rippling Spend cuts your month-end close by 80%	Personiv People power the platform—the secret to better outcomes	HighRadius 95% Of AI projects fail—how can you create value?

	DEMO 1	DEMO 2	DEMO 3	DEMO 4
10:40 am	Nilus AI co-pilot for solving cash visibility, broken forecasts and endless reconciliations	SoftCo AI powered, expert led unrivalled touchless AP automation	Eftsure Onboard, verify and approve to pay your vendors in a single workflow	Sequence AI-powered billing and quote-to-cash automation for modern b2b finance teams including Bill.com, Anthropic and Stripe
11:05 am	Zenskar Securing the autonomous future of finance with AI-native order-to-cash	PaymentWorks Verified vendors. Indemnified payments. Guaranteed peace of mind. No caveats.	FloQast Automate time-consuming accounting processes with AI agents	8Q Payments How to streamline and automate payments inside of NetSuite
11:35 am	Lunch Break			
12:20 pm	Deluxe Upgrade your payables—safer, more efficient payments start now	Hyper AI agents that replace humans in finance... so back office can focus less on receipts and more on strategy	isolved Detect financial risks before they happen with unified analytics	Paylocity Unify HCM, finance, and IT in one platform
12:45 pm	Forwardly End payment delays with AI-powered automation built for growing businesses	Nominal Two agents, zero surprises: transaction patrol + flux - smarter detection. Faster fixes. Cleaner books.	Zip Unlock faster AP cycles by starting upstream with intelligent intake	Brex Finance built for speed and control
1:10 pm	Datarails Automate & centralize your financial reporting without change management headaches	MakersHub Eliminates manual data entry, errors, and approval bottlenecks in ap	Zenwork Tax1099 Real-time information reporting—automate, validate, comply	insightsoftware AI-powered EPM: Smarter planning, faster close, seamless strategy execution

Pitch Stage

FATE Pitch Stage Finalists will have the opportunity to pitch their product or service to our audience of venture capitalists, angel investors, entrepreneurs and potential customers such as CFOs, VPs of finance, and other finance professionals.

	KEYNOTE STAGE	FINALISTS			
10:55 am	PITCH CATEGORY Core Finance Tech Stack				
11:35 am	PITCH CATEGORY Business Intelligence and Automation				
12:15 pm	Lunch Break				
1:00 pm	PITCH CATEGORY Productivity Tools				
1:40 pm	PITCH CATEGORY Disruptive Platforms and Tools				
5:00 pm	Pitch Stage Awards				

Exhibitors

COMPANY	BOOTH #
ACCOUNTING SOFTWARE	
Campfire	633
Charted	1108
FISPAN	308
FloQast	401
HighRadius	634
Hyper	214
Hyperbots	907
insightsoftware	227
Intuit	208
Maximor	823
NetSuite	908
Nominal	313
RightRev	226
Rillet	337
SkyStem	230
Squire Technology	902
Trintech	426
Velosio	912
Yooz	302
Zenskar	617
ACCOUNTS RECEIVABLE	
8Q Payments	1112
Auditoria.Ai	338
BILL	414
BillingPlatform	518
Billtrust	434
Exante	222
FlexPoint	341
Forwardly	619
HighRadius	634
Nacha	320
Personiv	1001
Quadient	1214
SoftCo	236
TabS	333
Versapay	613
Zenskar	617
Zuora	441
AP/AR AUTOMATION/PAYMENTS	
apexanalytix	334
Auditoria.Ai	338
Avalara	621
BILL	414
BillingPlatform	518
Billtrust	434
Brex	314
Charted	1108
Deluxe	520
Eftsure	319
FISPAN	308
Forwardly	619
HighRadius	634
Hyperbots	907
MakersHub	631
Nacha	320
Nilus	415
Payhawk	240
Paylocity	317
PaymentWorks	318
Personiv	1001
Pivot	408

COMPANY	BOOTH #
Quadient	1214
Rippling	327
SAP	402
Sequence	423
SoftCo	236
Tipalti	814
Vic.ai	218
Yooz	302
Zenwork Tax1099	1218
Zip	802
BILLING & REVENUE MANAGEMENT	
8Q Payments	1112
Baker Tilly	1221
BillingPlatform	518
Exante	222
Maximor	823
Paylocity	317
Quadient	1214
RightRev	226
Rillet	337
SAP	402
Sequence	423
TabS	333
Vayu	216
Versapay	613
Xactly	609
Zenskar	617
Zuora	441
CPQ	
3C Software	417
Baker Tilly	1221
Sequence	423
CRM	
Velosio	912
CYBERSECURITY	
apexanalytix	334
AWS	
Eftsure	319
IT Solutions	1213
Summit	630
DATA INTEGRATION	
Aleph	331
Datarails	437
Drivetrain	232
M-Files	422
Nilus	415
Preql	433
Slice Global Equity	339
xpna	231
ERP	
8Q Payments	1112
Armanino	432
AWS	
Baker Tilly	1221
Campfire	633
Everest Systems	128
Finnt	1217
FISPAN	308
Intuit	208

COMPANY	BOOTH #
NetSuite	908
PaymentWorks	318
Qubittron	819
Rillet	337
SAP	402
Squire Technology	902
Velosio	912
FINANCIAL CLOSE/REPORTING	
Abacum	532
Aleph	331
Anaplan	440
Armanino	432
Campfire	633
Consark.ai	340
Datarails	437
Drivetrain	232
Finnt	1217
FloQast	401
insightsoftware	227
Intuit	208
IRIS CARBON	343
Maximor	823
NetSuite	908
Nilus	415
Payhawk	240
PEX	330
Planful	608
Preql	433
RightRev	226
SkyStem	230
Trintech	426
Xactly	609
xpna	231
Yooz	302
Zuora	441
FP&A/CPM	
3C Software	417
Abacum	532
Aleph	331
AWS	
Cube	526
Datarails	437
Drivetrain	232
Hyper	214
insightsoftware	227
Planful	608
Preql	433
Una Software	702
Xactly	609
xpna	231
IT SERVICES/OUTSOURCING	
IT Solutions	1213
Finnt	1217
Personiv	1001
Qubittron	819
Summit	630
PAYROLL/BENEFITS	
Paylocity	317
Rippling	327
Salary.com	637
Slice Global Equity	339

COMPANY	BOOTH #
SALES TAX & TAX AUTOMATION	
Armanino	432
Avalara	621
Zenwork Tax1099	1218
SPEND & EXPENSE MANAGEMENT	
Anaplan	440
BILL	414
Brex	314
Expensify	321
Hyper	214
Navan	1114
Payhawk	240
PEX	330
Pivot	408
Planful	608
Ramp	322
Rippling	327
Tipalti	814
TravelPerk	110
TravelBank	714
Tropic	514
Vic.ai	218
Zip	802
VENDOR MANAGEMENT	
apexanalytix	334
Auditoria.Ai	338
Eftsure	319
Hyperbots	907
PaymentWorks	318
PEX	330
Pivot	408
Qubittron	819
SoftCo	236
Tipalti	814
Tropic	514
Zenwork Tax1099	1218
Zip	802
WORKFORCE MANAGEMENT	
isolved	914
Slice Global Equity	339
Unit4	508

Reception Sponsored by

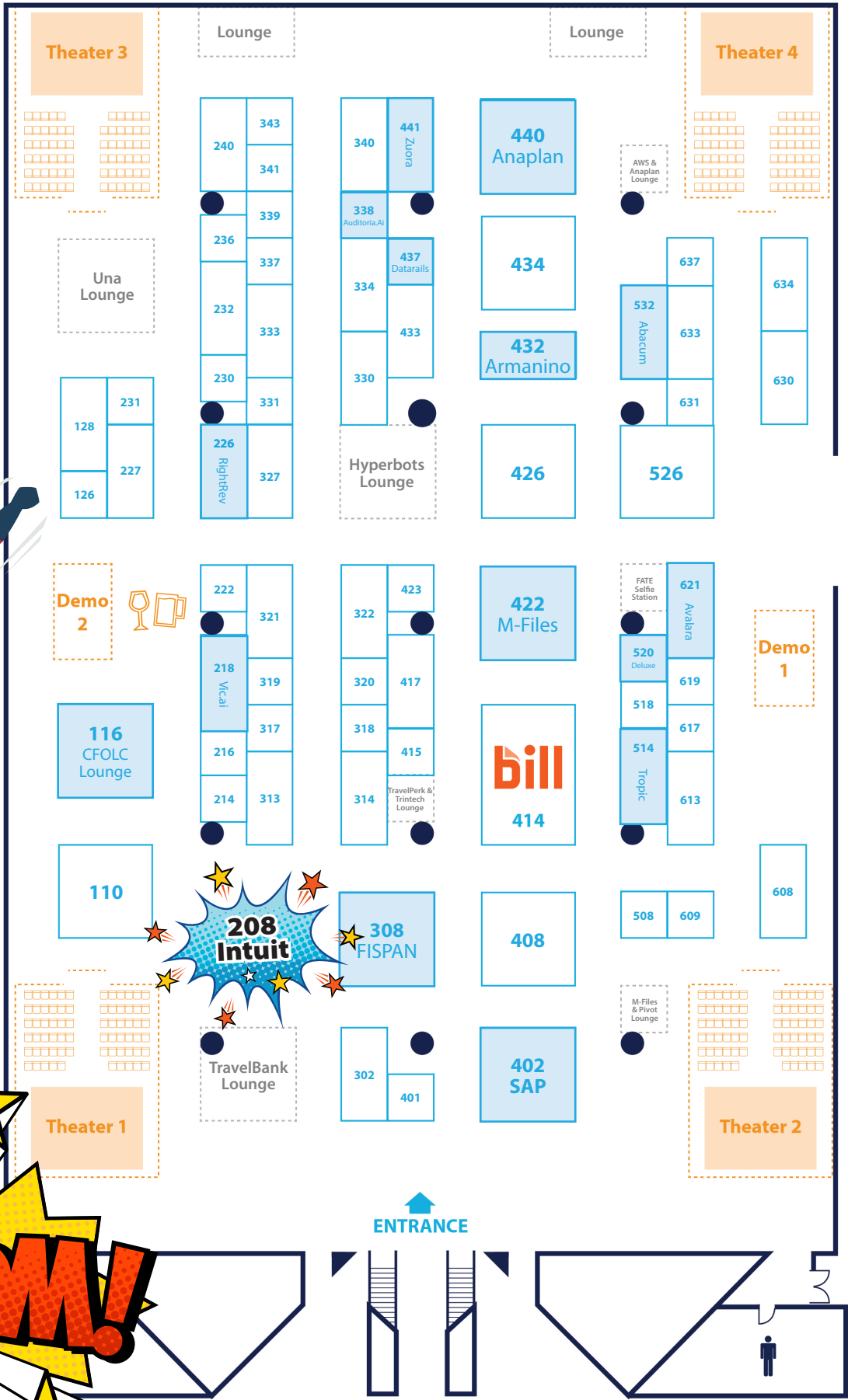
INTUIT
Enterprise Suite



Bat Cave Bars

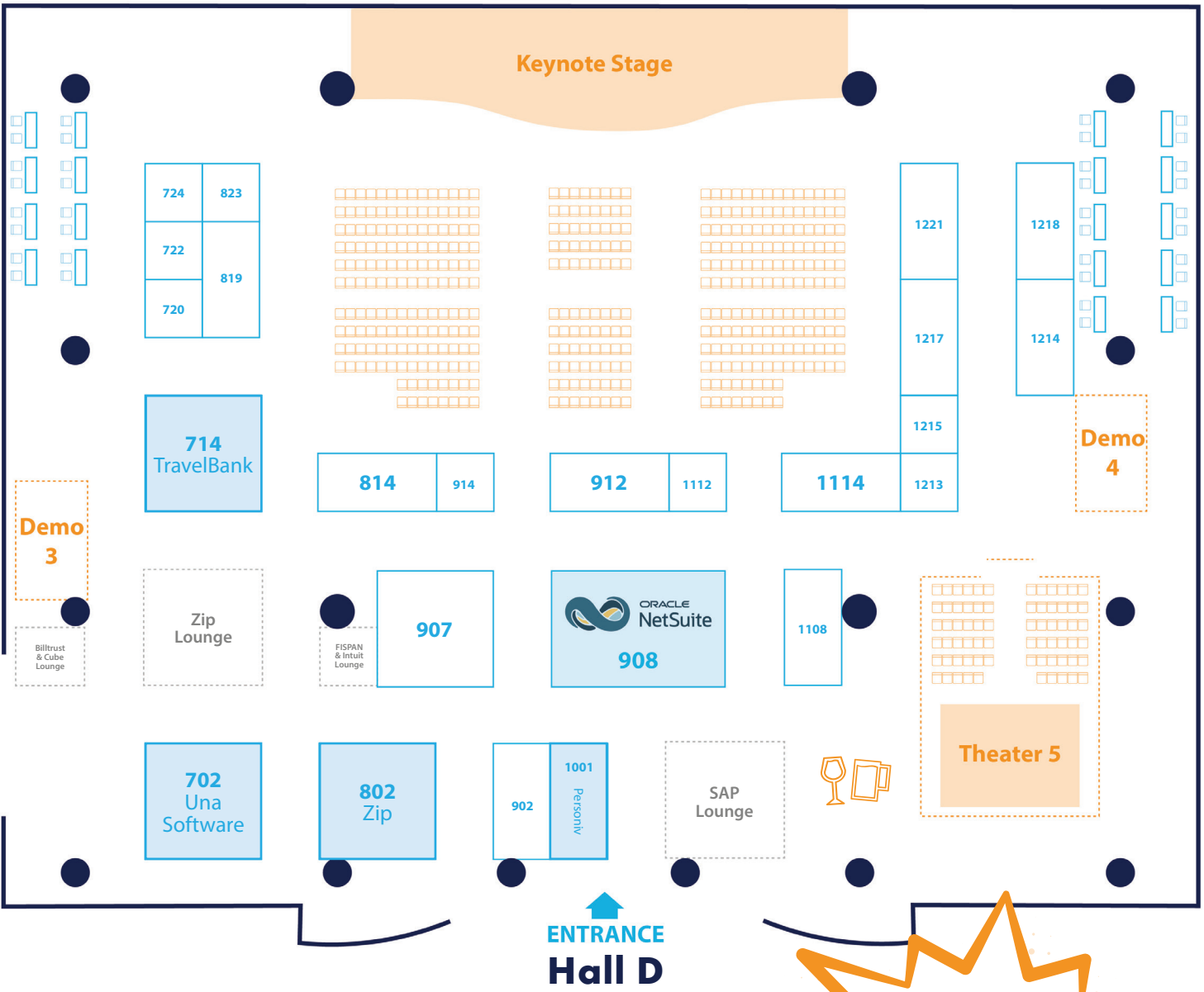
Passed Appetizers
provided by CFO Leadership

Super Sliders
Crispy Chicken Crusaders
Groot Cheeses



ENTRANCE

Hall E

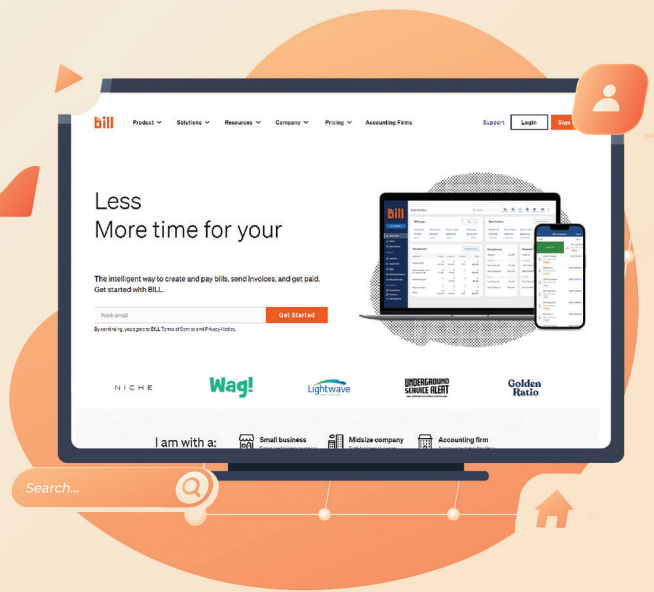


ENTRANCE
Hall D

Superhero Snacks and Heroic Sips

- 116 - CFOLC Lounge**
Mask. Snap. Win.
- 218 - Vic.ai**
The Core of a Hero's Lair
- 226 - RightRev**
The Green Ledger Cocktail
- 308 - FISPAN**
King Shark
- 338 - Auditoria.Ai**
Ruko the Smart Superhero Finance Robot
- 402 - SAP**
"Rise of the Visionaries"
Bean Bag Toss
- 422 - M-Files**
Holy Cannoli, Batman!
& Berry Allen Flash Bites
- 432 - Armanino**
Power Martini Bar
- 437 - Datarails**
Super SumIF Sangria & Photo Booth with Bob the Super FP&A
- 440 - Anaplan**
Finance Superhero Koozies
- 441 - Zuora**
Hero Toss Challenge
- 514 - Tropic**
Superhero Slices
- 520 - Deluxe**
Cutwater Command Center
- 532 - Abacum**
Spin For Your Superpower & Custom Bottle
- 621 - Avalara**
Flash Fizzies Cocktail
- 702 - Una Software**
FP&A Hero Crunch
- 714 - TravelBank**
Super Snap Station
- 802 - Zip**
Your Hero Identity: Engraved
- 908 - NetSuite**
The Suite Spot: SuperSuite Stanley's Beer Garden with Pretzels
- 1001 - Personiv**
Web Slinger Cocktails/Mocktails & Web-Shooter Challenge
- 208 - Intuit**
Topo Chico Bar: The Hero Your Thirst Deserves & Mighty Multi-Entity Dogs

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