



FINANCE & ACCOUNTING technology expo

PRODUCED BY



CFO Leadership



Attendee Guide

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

Sponsors



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.



R.D. 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.

Titanium



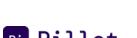
Platinum



Gold



Silver



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!



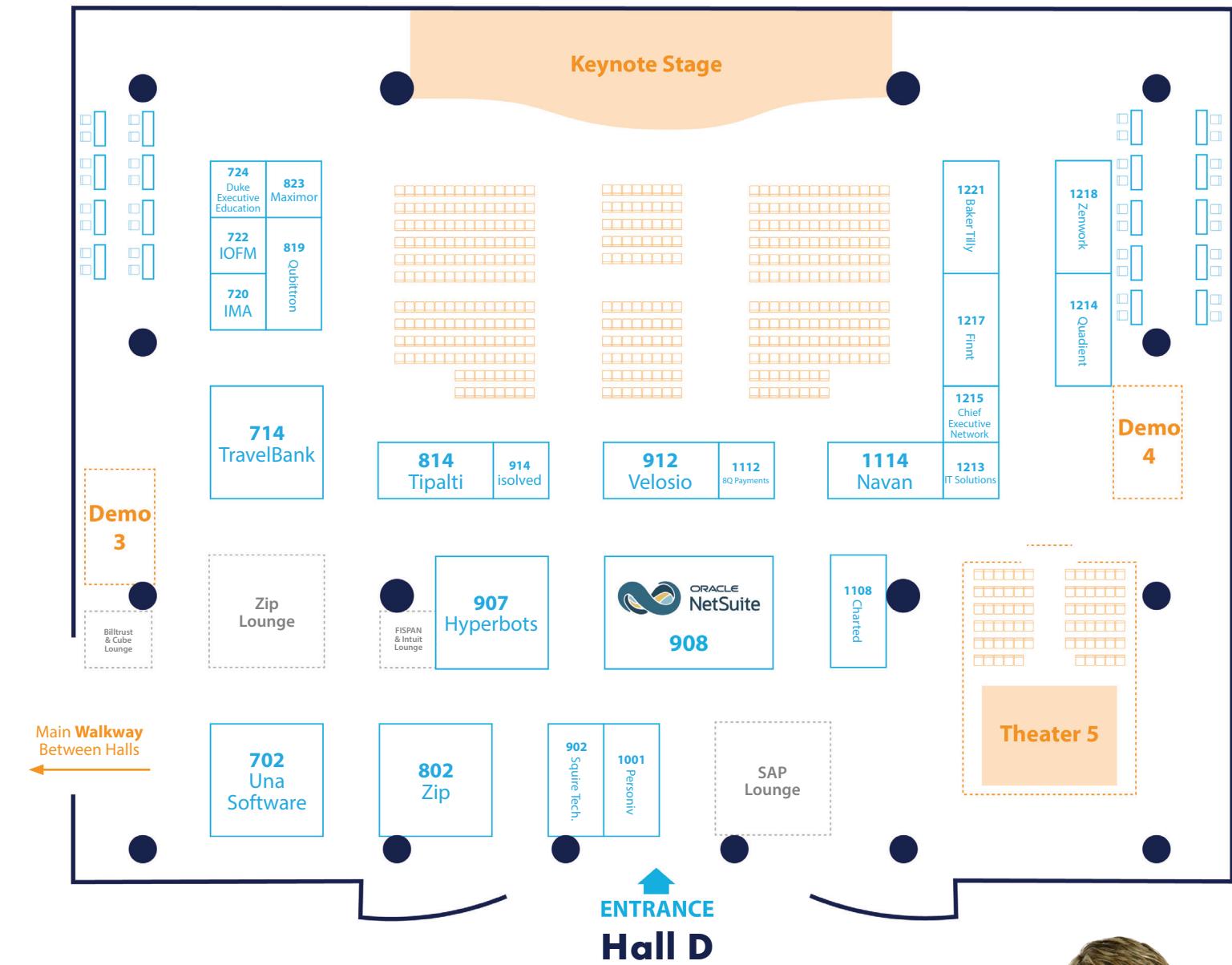
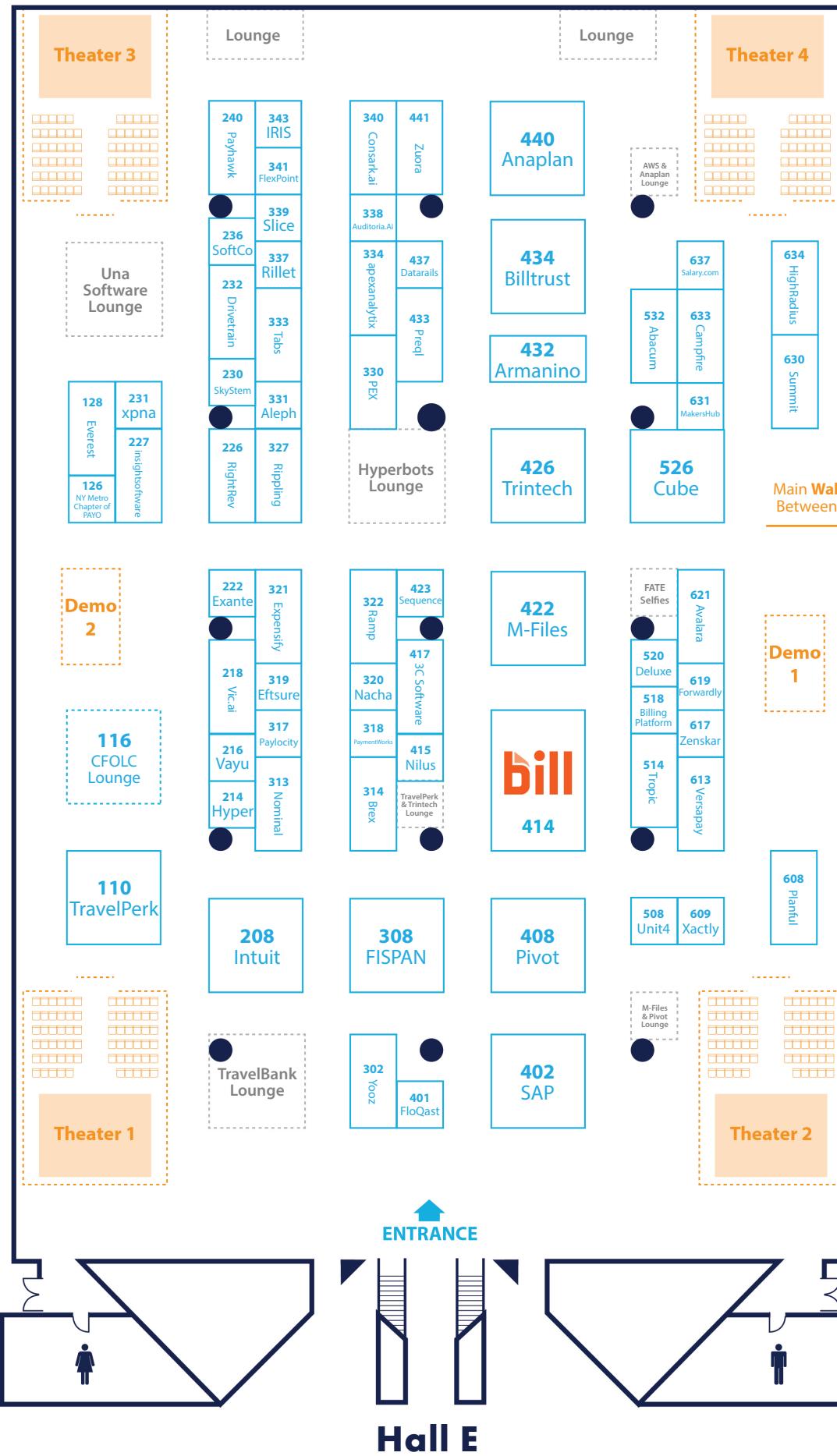
Network: FATE

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

	THEATER 1	THEATER 2	THEATER 3	THEATER 4	THEATER 5
9:00 am	 <p>KEYNOTE STAGE KEYNOTE Driving a Championship Culture Matt Doherty Motivational Speaker, Former Head Coach at Notre Dame and North Carolina</p>				<p>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.</p>
10:15 am	<p>Making the Business Case for AP Automation in NetSuite: Prevent Fraud, Improve KPIs and Get Ahead of the Game</p> <p>charted.</p>	<p>T&E Policy Failures Are Costing You—Fix Them Fast</p> <p>TravelBank</p>	<p>Future Proofing your Enterprise through AI-Powered Cloud ERP</p> <p>SAP</p>	<p>Finance Leadership in the Age of AI</p> <p>ORACLE NetSuite</p>	<p>State of Spend: What Spending Trends Reveal About Our AI-Enabled Future</p> <p>Zip</p>
10:55 am	<p>AI in Accounting and Finance: Risk, Reward & the Road Ahead</p> <p>planful</p>	<p>Beyond the Bottlenecks: Building Smarter Finance Teams With AI-Powered Automation</p> <p>bill</p>	<p>How to Get the Most Out of Your ERP with a Procurement Platform</p> <p>pivot</p>	<p>Introducing Agentic Performance Management: Accounting That Runs Itself</p> <p>Nominal</p>	<p>Embedding Compliance into the Daily Finance Workflow: Real-Time Reporting Controls & Alerts</p> <p>ZENWORK Tax 1099</p>
11:35 am	 <p>KEYNOTE STAGE LUNCH KEYNOTE MBA for Lunch Jack McCullough President & Founder, CFO Leadership Council</p>				<p>A conversation facilitated by Ranga Bodla, Head of Industry Marketing at NetSuite, about Jack McCullough's latest book <i>MBA for Lunch</i>.</p>
12:15 pm	<p>Identifying Cost Efficiency Through a Payments Strategy</p> <p>Nacha</p>	<p>AI Agents for Finance & Accounting: Lessons from 3,000+ Finance Transformations</p> <p>highradius</p>	<p>From Manual to Modern with a 5x Faster Close</p> <p>campfire</p>	<p>Streamlining Travel and Expense Management with AI</p> <p>NAVAN</p>	<p>15 Data Points to Identify and Prevent Payment Fraud</p> <p>apexanalytix.</p>
12:55 pm	<p>The CFO as AI Buyer: Building Smarter Systems, Not Hype Cycles</p> <p>everest</p>	<p>From Compliance to Growth Catalyst: How AI is Rewriting the Rules of Finance</p> <p>RightRev</p>	<p>How Resilient Finance Leaders Turn Tech + Talent into Impact</p> <p>personiv an eClerx division</p>		<p>Closing the Gap: How AI Agents Streamline Billing, Collections, and Revenue Recognition</p> <p>tabs+</p>
1:35 pm	 <p>KEYNOTE STAGE KEYNOTE Words Are Your Most Powerful Weapon: Communication Strategies from Inside the Secret Service Evy Poumpouras Former Secret Service Special Agent and Interrogator</p>				<p>Success in work and life comes down to one thing: mastering the art of communication and Evy Poumpouras will teach you how to do it like a pro.</p>

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	Qubitron 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 unrivaled 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				
THURSDAY, NOVEMBER 13				
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				
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			
FRIDAY, NOVEMBER 14				

Exhibitors

COMPANY	BOOTH #	COMPANY	BOOTH #	COMPANY	BOOTH #	COMPANY	BOOTH #
ACCOUNTING SOFTWARE		Quadient	1214	NetSuite	908	SALES TAX & TAX AUTOMATION	
Campfire	633	Rippling	327	PaymentWorks	318	Armanino	432
Charted	1108	SAP	402	Qubitron	819	Avalara	621
FISPAN	308	Sequence	423	Rillet	337	Zenwork Tax1099	1218
FloQast	401	SoftCo	236	SAP	402		
HighRadius	634	Tipalti	814	Squire Technology	902		
Hyper	214	Vic.ai	218	Velosio	912		
Hyperbots	907	Yooz	302				
insightsoftware	227	Zenwork Tax1099	1218				
Intuit	208	Zip	802				
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						
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						
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						
Qubitron	819						
Summit	630						
PAYROLL/BENEFITS							
Paylocity	317						
Rippling	327						
Salary.com	637						
Slice Global Equity	339						

Finance League: Heroes of the Bottom Line Reception

November 13 Reception | Exhibit Hall Floor | 5:30 - 6:30 pm

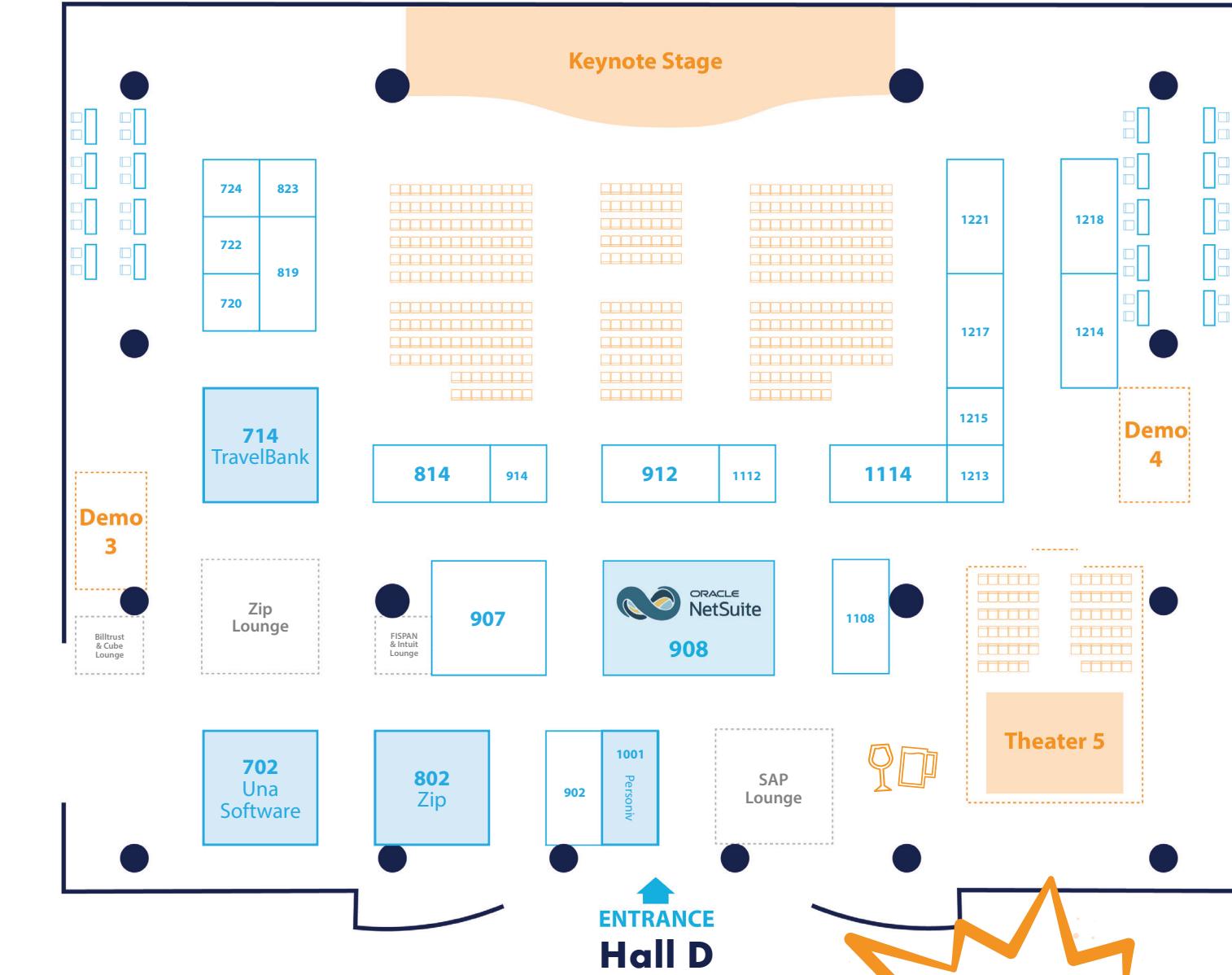
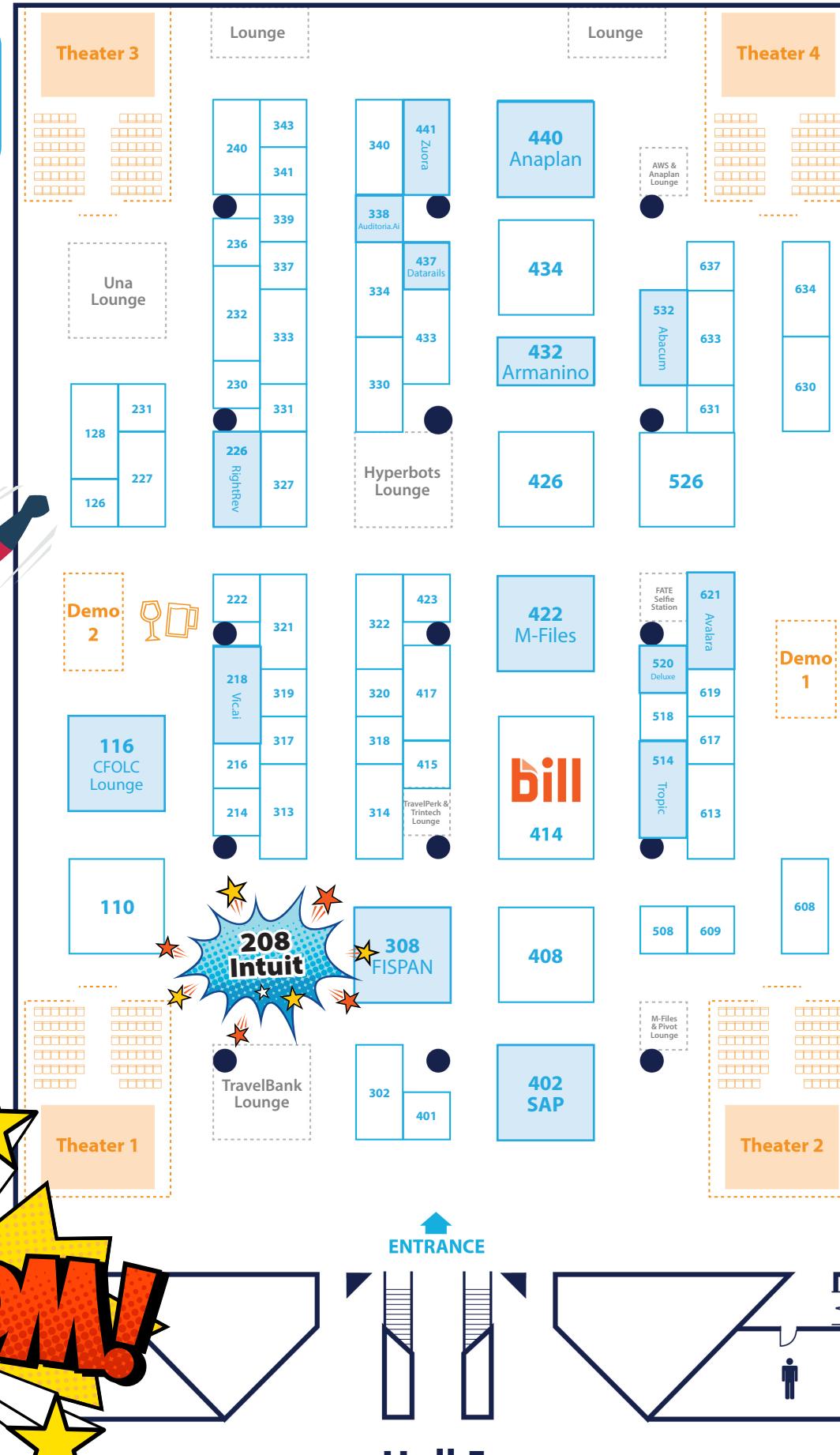
Reception Sponsored by
INTUIT
Enterprise Suite



Bat Cave Bars

Passed Appetizers provided by CFO Leadership

Super Sliders
Crispy Chicken Crusaders
Groot Cheeses



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

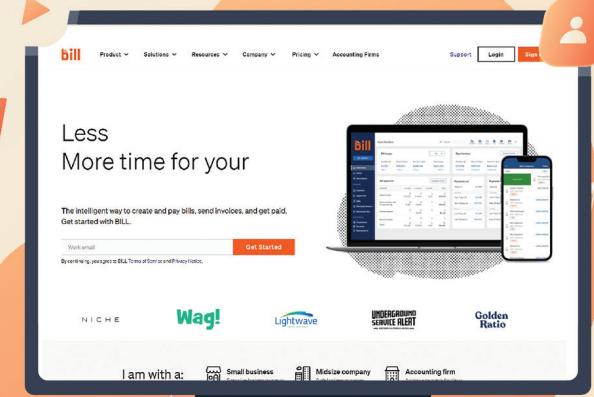
714 - TravelBank
Super Snap Station

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

bill.com



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Built for AI. Built for what's next.

