# CONNECTED COMMUNITIES

## January 17, 2018 | San Francisco

BPM

Tax | Assurance | Advisory

# Agenda: Morning

| Time | Location | | | | | | |
|---|---|---|---|---|---|---|---|
| | Cyril Magnin Ballroom | Cyril Magnin Ballroom (I) | Cyril Magnin Ballroom (II) | Cyril Magnin Ballroom (III) | Foyer | Mission Room | Powell Room |
| 8:30 AM | | | | | Breakfast and Registration | | |
| 9:00 AM | Welcome | | | | | | |
| 9:15 AM | Keynote Address | | | | | | |
| 10:10 AM | Chief Financial Officer Revolution | | | | | | |
| 11:00 AM | | | | | Break | | |
| 11:15 AM | Tax Reform | | | | | | |
| 12:05 PM | | | | | Lunch | | |

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|---|---|---|
| | Breakfast and Registration | |
| 1 | Welcome | Daniel Figueredo, CPA, CGMA, Partner, Assurance, Nonprofit Industry Group Leader, BPM |
| 2 | Keynote Address | **The Empire Strikes Back: The Coming Deregulation of the Financial Sector**<br>Steve Eisman of *The Big Short*<br>Senior Portfolio Manager, Neuberger Berman |
| 3 | Chief Financial Officer Revolution | **The Modern Chief Financial Officer Revolution: Discussing the Skills and Tools Necessary to Scale Your Organization**<br>Moderators:<br>• Michael Baker, Practice Development Manager, Sage Intacct<br>• Paula Saidy, Senior Manager, Advisory, BPM<br>Panelists:<br>• Jolie Bou, Chief Financial Officer, Samaritan House<br>• Shari Freeman, Chief Financial Officer, Room to Read<br>• Jackie Vasilatos, Director of Strategic Finance, GuideStar |
| | Break | |
| 4 | Tax Reform | **What You Need to Know About Tax Reform**<br>Panelists:<br>• Jean L. Tom, Partner, Davis Wright Tremaine LLP<br>• Thomas C. Schroeder, Senior Counsel, Tax-Exempt Organizations and Charitable Giving, University of California, Office of General Counsel |
| | Lunch | |

**Download all course materials at bpmcpa.com/ConnectedCommunities**

# Agenda: Afternoon

| Time | Location | | | | | | |
|---|---|---|---|---|---|---|---|
| | Cyril Magnin Ballroom | Cyril Magnin Ballroom (I) | Cyril Magnin Ballroom (II) | Cyril Magnin Ballroom (III) | Foyer | Mission Room | Powell Room |
| 1:20 PM | | Security | Employment Law | ESG Investing | | Getting it Done | Sage Intacct Dashboards |
| 2:15 PM | | Office Leases | Labor Costs | Investments | | | Dashboard Strategies |
| 3:05 PM | | | | | Break | | |
| 3:25 PM | | Financial Reporting | Technology Automation | Effective Strategies | | | Transformation |
| 4:15 PM | | | | | Reception | | |

| | | |
|---|---|---|
| 1 | Security | Effective Information for Security Risk Management |
| | Employment Law | Sexual Harassment Overview: 2018 Employment Law Updates and Hot Topics for Non-Profits |
| | ESG Investing | The ABC's of ESG Investing |
| | Sage Intacct Dashboards | Delivering Performance Measures to Decision Makers |
| 2 | Office Leases | Before Your Next Office Lease: What to Know, What to Do, and What to Watch For |
| | Labor Costs | Tying Labor Costs to Funding Sources, and Why This Can Lead to More Service Delivery |
| | Investments | Impact Investing For Your Whole Portfolio |
| | Dashboard Strategies | Sage Intacct Dashboards: Dashboard Strategies |
| | Break | |
| 3 | Financial Reporting | Strategies for the New Not-For-Profit Financial Reporting Standard |
| | Technology Automation | How Spend Management Automation Helps Non-Profits Achieve Their Goals |
| | Effective Strategies | Effective Strategies to Connect with Funders |
| | Transformation | Transformation from Historian to Strategist |
| | Reception | |

**Getting it Done: Sign-up at the registration table for one-to-one discussions with GuideStar, LinkedIn and to have your professional headshots taken (limited availability).**

# Sessions Information

## Morning Sessions

### Keynote Speaker: The Empire Strikes Back: The Coming Deregulation of the Financial Sector

9:15 AM—Cyril Magin Ballroom

Steve Eisman of *The Big Short*
Senior Portfolio Manager, Neuberger Berman

Steve Eisman, portrayed in the 2015 motion picture based on Michael Lewis's bestselling book, The Big Short, will reflect on the crisis of 2008 and where he sees opportunities in the current market. Steve will focus on deregulation of the financial sector and its potential impact on markets going forward.

### The Modern Chief Financial Officer Revolution: Discussing the Skills and Tools Necessary to Scale Your Organization

10:10 AM—Cyril Magin Ballroom

Moderators:
- Michael Baker, Practice Development Manager, Sage Intacct
- Paula Saidy, Senior Manager, Advisory, BPM

Panelists:
- Jolie Bou, Chief Financial Officer, Samaritan House
- Shari Freeman, Chief Financial Officer, Room to Read
- Jackie Vasilatos, Director of Strategic Finance, GuideStar

Hear from the experts on how they have modernized their accounting/finance functions, as well as tools and strategies for success.

### What You Need to Know About Tax Reform

11:15 AM—Cryil Magin Ballroom

Panelists:
- Jean L. Tom, Partner, Davis Wright Tremaine LLP
- Thomas C. Schroeder, Senior Counsel, Tax-Exempt Organizations and Charitable Giving, University of California, Office of General Counsel

We will review the key provisions of the tax reform bill that will affect non-profits, colleges and universities.

## Afternoon Sessions

### Effective Information for Security Risk Management

1:20 PM—Cyril Magnin Ballroom (I)

Panelists:
- David Trepp, M.S., Partner, IT Assurance, BPM
- Martin Fox-Foster, Claims Manager, G2 Insurance Services

One of the biggest challenges around information security is figuring out how to defend against threats and what to do about breaches. Determining how to develop an information security program and the best course of action after a breach can be daunting, even for highly technical decision makers. David and Martin will discuss what to do, before and after a breach.

### Sexual Harassment Overview, 2018 Employment Law Updates, and Hot Topics for Non-Profits

1:20 PM—Cyril Magnin Ballroom (II)

Panelists:
- Victoria Tallman, Associate, Davis Wright Tremaine LLP
- William David, Associate, Davis Wright Tremaine LLP

Don't let your organization become the next news headline. Come learn about California law on sexual harassment, and how to limit your organization's liability. In this session, we will also cover California Employment Law Updates for 2018, as well as a few hot topics for non-profits.

### The ABC's of ESG Investing

1:20 PM—Cyril Magnin Ballroom (III)

Panelists:

- Jonathan Bailey, Managing Director, Head of ESG Investing, Neuberger Berman
- Elizabeth Cribbs, Head of Corporate Social Responsibility and Foundation President, Neuberger Berman

For those of you newer to the world of ESG Investing, join us for an interactive conversation to learn more. This session will cover what ESG investing is (ESG 101) and the benefits it can provide, ways to begin thinking about integrating it into your investment process and establishing appropriate guidelines, as well as innovations in the field.

### Getting It Done

1:20 PM – 4:00 PM—Mission Room

Head shots with Anne Douglass

One-to-one LinkedIn update discussions with Kiersten Sattler, Talent Acquisition Manager, BPM

GuideStar presentation on how to use GuideStar at your organization with Adrian Bordone, Vice President, Strategic Partnerships, GuideStar

Sign-up at the registration desk to reserve your time in "Getting It Done" (limited availability).

### Sage Intaact Dashboards: Delivering Performance Measures to Decision Makers

1:20 PM—Powell Room

Katie McCloskey, Sales Support Engineer, Sage Intacct

Financial insights are a critical element every decision-maker needs, but there is more to the story. Incorporating operational performance measures into the information provided for insight allows those in decision making roles to make choices based on more holistic data. This session will focus on how to make this level of insight with both financial and performance measures visibility a reality.

### Before Your Next Office Lease: What to Know, What to Do, and What to Watch For

2:15 PM—Cyril Magnin Ballroom (I)

Paul Picciani, Partner and Senior Vice President—Tenant Representation Services, Kidder Mathews

This session will provide a detailed overview of what nonprofits and foundations should be aware of before signing their next office lease. Paul Picciani of Kidder Mathews, who focuses exclusively on the needs of office tenants with a substantial emphasis on nonprofits and foundations, will talk through each step of the process and provide helpful tips to make your next lease as smooth, sensible, and cost-effective as possible.

### Tying Labor Costs to Funding Sources, and Why This Can Lead to More Service Delivery

2:15 PM—Cyril Magnin Ballroom (II)

Panelists:

- Ryan Anschuetz, Vice President External Channels, ADP
- Christine Selva, Sales Executive, Major Accounts, ADP

Labor costs typically represents the largest expense to a non-profit organization. With this expense comes the importance of reporting accurately back to grants and funding sources. Ryan Anschuetz, VP of Channels & Alliances will cover how some of the best run non-profits are tracking and reporting this expense back to funding sources in order to insure renewals and increases, as well as positioning themselves for new funding opportunities.

### Impact Investing For Your Whole Portfolio

2:15 PM—Cyril Magnin Ballroom (III)

Panelists:

- Jonathan Bailey, Managing Director, Head of ESG Investing, Neuberger Berman
- Jennifer Signori, Senior Vice President, ESG Investing, Neuberger Berman

Investors considering the social and environmental impact in conjunction with investment performance in their portfolios is now mainstream. This session will discuss how investors can have portfolios with investments across asset classes and spanning the impact spectrum, which collectively contribute to their total portfolio impact.

# Sessions Information (continued)

### Sage Intacct Dashboards: Dashboard Strategies

2:15 PM—Powell Room

Katie McCloskey, Sales Support Engineer, Sage Intaact

Dashboards are a great, modern way to deliver insights across organizations. This session will focus on the variety of ways dashboards can be leveraged for improved insight, address the question of "what to dashboard," and what should be considered as an organization starts to share information via dashboards.

### Strategies for the New Not-for-Profit Financial Reporting Standard

3:25 PM—Cyril Magnin Ballroom (I)

Panelists:

- Daniel Figueredo, CPA, CGMA, Partner, Nonprofit Industry Group Leader, BPM
- Shannon Winter, CPA, Senior Manager, Silicon Valley Nonprofit Leader, BPM

The FASB's new Not-for-Profit Financial Reporting Standard (ASU 2016-14) will change the way not-for-profit financial statements are presented and what information is presented to users of the financial statements. The new guidance is effective for years beginning after December 15, 2017 which means for a calendar year end the new guidance is effective for your annual audit for December 31, 2018. Are you ready for the new disclosures and implementation? This presentation will highlight the changes, provide examples, and provide strategies for the implementation as well as the summary of the changes.

### Spend Management: What Is It and Why Nonprofits Should Care

3:25 PM—Cyril Magnin Ballroom (II)

John Parisi, Senior Business Development Manager, Concur

Most non-profits seek to maximize the amount they can spend on program work and minimize their administrative spend. One way for non-profits to reduce the cost and the amount of time spent on administrative tasks in the back office is to leverage technology that automates their accounts payable and expense reporting process. Attend our session and we will walk you through the steps to streamline your expense reporting and AP processes, improve transparency and compliance, all while keeping your team motivated and engaged.

### Effective Strategies to Connect with Funders

3:25 PM—Cyril Magnin Ballroom (III)

Elizabeth Cribbs, Head of Corporate Social Responsibility and Foundation President, Neuberger Berman

Whether it be data, volunteerism, or board engagement, share your best strategies for connecting with funders and learn from others' best practices. This session will explore what works best to establish and maintain a strong connection with funding sources.

### Transformation from Historian to Strategist

3:25 PM—Powell Room

- Michael Baker, Practice Development Manager, Sage Intaact
- Paula Saidy, Senior Manager, Advisory, BPM

Whether your nonprofit is a foundation, public charity, social advocacy group, or trade organization, you're commitment to your mission and your community depends on you. You depend on your employees, volunteers, and donors. You also depend on your IT infrastructure to help secure the success of your nonprofit and, for long-term growth, you need to move from being a data historian to a strategist. Learn of the challenges that face nonprofits during this time of constant change and how, with the help of technology and innovation, today's cloud-based solutions are helping nonprofits solve their biggest challenges and enable them to deliver on their mission.

# Join BPM in 2018 for the Nonprofit Education Series

BPM's Nonprofit Services Group is committed to providing the nonprofit sector with quality services and essential information to ensure success with our Nonprofit Education Series. Professional speakers have been selected based on their expertise in a particular field and the wealth of knowledge and information they possess. We invite you to join us for our monthly sessions throughout the year, at no cost, as we cover a wide range of important topics in person or by webinar:

2018 sessions will include:

- Understanding significant issues and how to position your organization with capital campaigns
- The impact of the New FASB standard on funders and charities with grants and contracts
- The impact of cryptocurrency on the nonprofit sector
- Unrelated business income considerations with the new tax reform
- How to train your staff on cyber risks

Visit bpmcpa.com/npes to learn more about our Nonprofit Education Series and to view past topics and webcasts.

# Speaker Biographies


**Ryan Anschuetz**

**Vice President of Alliances and Partners, Major Account Services, ADP**

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Ryan has been with ADP since 2001, and is currently Vice President of Alliances and Partners for Major Accounts. In this role, he identifies potential partnerships with companies that closely align with ADP's focus on business. He then works closely with these companies to create and execute strategies that significantly benefit company financials and their employees.

Prior to his current position, Ryan spent several years in various field sales leadership roles, and contributed to ADP as an adjunct faculty member for sales learning and performance. He also served on the ADP VP Advisory Board.

Ryan holds a Bachelor of Arts degree in Business Administration from Nova Southeastern University, and is an active member of the Sharks Alumni baseball program.


**Jonathan Bailey**

**Managing Director, Neuberger Berman**

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Jonathan Bailey, Managing Director, is Head of Environmental, Social and Governance (ESG) Investing at Neuberger Berman. Jonathan joined in 2017 and is responsible for the integration of material ESG factors into investment processes firm-wide. He and his team work with portfolio managers and analysts across our equities, fixed income and private investment portfolios both to enhance existing strategies and to launch new ESG investment strategies. Jonathan oversees the firm's proprietary ESG rating system and research process. Jonathan chairs the firm's ESG Committee and sits on the firm's Governance and Proxy Voting Committee. He also leads client engagement and thought leadership on ESG topics for the firm. Previously, Jonathan was the founding Director of Research at Focusing Capital on the Long Term (FCLT Global) a think tank backed by BlackRock, Canada Pension Plan Investment Board, Dow, McKinsey & Co., and Tata Sons which worked on practical solutions to excessive short-termism along the investment value chain. He spent the bulk of his prior career at McKinsey & Co where he was an Associate Partner working with asset owners and asset managers on investment strategy and ESG investing topics. He has also worked for Generation Investment Management, the sustainable investment fund co-founded by former Vice President Al Gore, and on governance projects for former British Prime Minister Tony Blair. Jonathan holds an MBA (with high distinction) from Harvard Business School, an MPP from the Harvard Kennedy School of Government, and an MA(Oxon) from the University of Oxford. Jonathan is a board member of Instiglio, the developing market social impact bond advisory non-profit, and a member of the advisory board of CECP's Strategic Investor Initiative.


**Michael Baker**

**Practice Development Manager, ADP**

(408) 878-0900
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Michael Baker is a Sage Intacct Accountants Program (SIAP) Practice Development Manager. He concentrates on working with accounting firms and creating resources for the growth of their cloud-based accounting services practices utilizing the Sage Intacct software and financial management solution and SIAP Program in partnership with cpa.com. Michael works on best practices for vertical industry focus, pre-sales support and scoping and solutions management for complex business scenarios. Michael has over 25 years of experience in consulting and accounting. He has held a wide variety of roles including Finance Director and Revenue Manager for software companies as well as ten years as a consultant at Deloitte. Michael was a Sage Intacct client for nearly eight years.


### Adrian Bordone

**Vice President, GuideStar**

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Adrian Bordone has 20+ years of experience in the nonprofit sector—focused primarily on service deliver, data and technology.

He began his career in service in West Baltimore teaching suspended and expelled middle school students before joining The Learning Bank—a "storefront" grassroots, literacy organization led by the Sisters of Mercy. While at The Learning Bank, he lead an integrated Adult Literacy and Workforce Development initiative with corporate and nonprofit partners. Adrian then joined the Maryland Center for Arts and Technology whose mission focused on youth arts education and adults customized training and employment focused on replicating Pittsburg's renowned Manchester/Bidwell Craftsmen's Guild.

Today, Adrian leads GuideStar's Strategic Partnerships and Philanthropic Relations teams where he is helping to strengthen its work in service to the many stakeholders of the nonprofit sector. He oversees all of GuideStar's Marketing, Communications and Earned/Philanthropic Revenue teams.

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### Jolie Bou

**Chief Financial Officer, Samaritan House**

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Jolie Bou is the Chief Financial Officer at Samaritan House and leads the Finance/Accounting team. She's passionate about having positive synergy between finance and development departments. Her responsibilities also include Information Technology and Risk Management. She has been in this role since September 2005. Prior to joining the Samaritan House team, she was the Executive Director for the Women's Recovery Association in Burlingame and prior to that was their Director of Finance for 10 years. Jolie's career began in accounting and her non-profit work goes back more than 35 years with experience and expertise in a wide range of key areas including finance, accounting, strategic planning, development, human resources and capacity building. In addition, Jolie has participated in several distinct national and local organizational learning collaboratives. These initiatives focused on process improvement, infrastructure capacity, outcomes, and learning from peer organizations.

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### Elizabeth Cribbs

**Head of Corporate Social Responsibility and Foundation President, Neuberger Berman**

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Elizabeth R. Cribbs is a Managing Director and the Head of Corporate Social Responsibility at Neuberger Berman. She also serves as President of the Neuberger Berman Foundation. Prior to this Elizabeth worked at Lehman Brothers as a Senior Vice President of the Corporate Philanthropy group. Elizabeth spent ten years at HSBC where she served in various capacities including vice president of Strategic Planning for Corporate, Investment Banking and Markets; team leader of HSBC's Community Development Group; and Director of Community and Philanthropic Services where she launched HSBC's volunteer-based Corporate Social Responsibility program. Elizabeth began her career in the audit group at Coopers & Lybrand LLP and is a CPA.

She is a member of the New York Advisory Board of Enterprise Community Partners, where she serves on the Executive Committee; and is Vice Chair of the New York City Youth Board, which advises the New York City Department of Youth and Community Development. She is also a member of the Philanthropy New York CEO Forum.

# Speaker Biographies (continued)

**William David**
**Associate,**
**Davis Wright Tremaine**
(415) 276-6511
willdavid@dwt.com

William David focuses his practice on employment law. He defends employers against discrimination, retaliation, harassment, and wrongful termination claims, as well as wage and hour class actions. William has successfully defended employers in state and federal court and in arbitration.

**Anne Douglass**
**Photographer**
(916) 990-4422
annedouglass.com

I like to have fun! The pictures and designs I create tell the story of your special day. My work is part of an artistic process; I translate your moments and experiences into exciting and unique visuals.

I love photographing weddings, family reunions and other important occasions, as well as helping to design invitations, flyers, and websites for special events.

I have lived and worked all over the world, including Germany, England and Brazil. I've also had the privilege of studying under some of the great photographers of our day, such as Bambi Cantrell, Michael Van Aken, John Kippin. As well, I have several academic degrees in photography and art history. I seem to collect these degrees like they are going out of style!

I am passionate about my profession, and have over 10 years of experience in photography and design.

Currently based in the Sacramento area in Folsom, CA.

**Steve Eisman**
**Senior Portfolio Manager,**
**Neuberger Berman**
(415) 249-8011
ttaylor@nb.com

Steven Eisman, Managing Director, joined the firm in 2014. Steven is a Senior Portfolio Manager for the Eisman Group, within the firm's Private Asset Management division. Prior to joining the firm, he was the founder and portfolio manager of Emrys Partners, L.P. Previously, Steven was a partner and the senior portfolio manager of the FrontPoint Financial Services Fund, which began operations in March 2004, and the FrontPoint Financial Horizons Fund, which began operations in January 2006. Earlier in his career, Steven also served as a managing director and senior financial services analyst at Chilton Investment Co. He held the same role at Oppenheimer & Co. within the Investment Bank, Asset Management and Specialty Finance divisions. During his time at Oppenheimer & Co., Steven was ranked as an All-Star Analyst by both Institutional Investor and The Wall Street Journal on multiple occasions. He has over 20 years of investing experience, with the last 7+ years as a Portfolio Manager. Steven holds a BA from the University of Pennsylvania and his JD from Harvard Law School.

**Martin Fox-Foster**

**Claims Manager,**
**G2 Insurance Services**

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mfoxfoster@g2insurance.com

Martin Fox-Foster has over 15 years of experience in the insurance industry including as an attorney in London for a specialist insurance law firm acting as coverage counsel for insurers. He has turned this experience around and brings his considerable experience and expertise to bear for policyholders to secure favorable coverage and guide clients through the claims process from start to successful finish. Martin has particular experience in relation to Cyber incidents having handled over 1000 data breaches for non-profits and public entities guiding clients through the breach response and insurance recovery process. Martin joined G2 in July 2016 and is responsible for the development and management of G2's claims team.

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**Daniel Figueredo**

**Partner, Assurance,**
**Nonprofit Industry Group Leader,**
**BPM**

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Daniel leads BPM's Nonprofit Group and is also a leader in the Financial Services Industry Group. He has worked extensively with fair value and alternative investments, Single Audits, significant endowments and UPMIFA, tax-exempt debt, planned giving, partnership accounting, program-related investments, New Markets Tax Credits, gifts-in-kind, and significant capital campaigns. Daniel is an organizer of BPM's long-standing Nonprofit Education Series for Nonprofits and he is a regular presenter for industry groups and conferences. His experience in Nonprofit includes Arts and Culture, Environmental, Higher Education, Political and Advocacy Organizations, Private and Community Foundations, Private Schools, Religious Organizations, Social Enterprises, and Trade Associations. His financial service experience includes FinTech, Hedge Funds, Impact Investing, Investment Banking, Marketplace Lending, Broker-Dealers, and Venture Capital. Daniel is a graduate of the University of San Francisco with a Bachelor's degree in Accounting and Finance. Daniel's community involvement includes serving on the Audit Committee for CalCPA, CalCPA Not-for-Profit Conference Co-Chair, Treasurer and Conference Committee for the Northern California Planned Giving Council, Board of Directors for Smith-Kettlewell Eye Research Institute, Treasurer for the Online Lending Policy Institute, University of San Francisco—Accounting Advisory Board, Finance Committee for SF Performances, The Guardsmen—Waiting List Member, and Leadership San Francisco Class of 2016.

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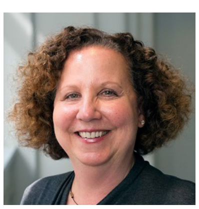

**Shari Freedman**

**Chief Financial Officer,**
**Room to Read**

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Shari has over 25 years of international finance, non-profit and administrative management experience with companies ranging in size from $35MM – $150B. Prior to joining Room to Read four years ago, she served as Chief Financial Officer at Niman Ranch, Wordwise, Inc. and most recently with One Medical Group—all for-profit companies with important social missions. Prior to that, she provided international corporate finance and administrative management to best in class global branded companies, including Gap, PepsiCo and GM. She was one of the San Francisco Business Times' Most Influential Women in Bay Area Business in 2012. Shari's non-profit experience includes serving on a multitude of nonprofit boards in SF and NY as well as chairing the boards of the San Francisco-Marin Food Bank and JVS (Jewish Vocational Service). She is an active angel investor and supporter of startups with a particular focus on increasing capital for women entrepreneurs. Her academic pedigree includes courses at Harvard, an MBA from Georgetown and a BA from American University.

# Speaker Biographies (continued)


**Katie McCloskey**

**Sales Support Engineer, Sage Intacct**

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Katie McCloskey is a Solution Consultant at Intacct and has spent nearly 20 years in the software publishing industry. Katie has spent a majority of that time working with non-profits, ministry, and governmental organizations helping them with their financial needs such as generating financial statement reports, process allocations, tracking funding, tracking investments and much more. She has also extensive experience in helping nonprofits with their training and implementation and is a regular speaker at financial conferences focusing on nonprofits.

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**John Parisi**

**Senior Manager, Business Development, Concur Technologies**

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John Parisi is a Senior Manager on the Business Development team at Concur Technologies and is responsible for developing partnerships for the Concur Solution Provider program working with CPA, VARs and consultants to introduce them and their clients to Concur spend management solutions.

John is a veteran in the US accounting professional and VAR communities having spent six of his eight years at Sage revamping and then managing and growing their Sage Accountants Network to support accounting professionals across their SMB suites of products. His previous experience was at Philips and NEC where he held various roles in channel and product marketing.

John is a Chicago native, but currently resides in Roswell, GA. He is married to a wonderful woman for over 30 years who raised their son and daughter. He volunteers a lot of his time with the Boy Scouts of America where he is a Committee Member and Life to Eagle coordinator along with volunteering as an adult leader with his church's high school youth group.

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**Paul Picciani**

**Vice President of Alliances and Partners, Major Account Services, Kidder Mathews**

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Paul Picciani joined Kidder Mathews in 2009 from a local San Francisco firm, Pacific Union Commercial Brokerage. Paul became a shareholder of Kidder Mathews in 2013 and was elected to the firm's board of directors in 2015.

His practice has always had a 100% focus on effective tenant representation, with a substantial emphasis on nonprofits and foundations. His strong performance for clients throughout the Bay Area has resulted in virtually all of his work coming from client referrals.


**Paula Saidy**

**Senior Manager, Advisory, BPM**

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Paula is a senior manager in BPM's Advisory practice. She focuses on helping small to mid-level companies with systems implementation, business process automation, Chief Financial Officer advisory and outsourcing as well as developing new business and conducting internal training for staff. She has over 16 years of experience in private industry and public accounting including nonprofit organizations, real estate, property management, retail, manufacturing, construction and service corporations. She has extensive experience with building dashboards, budgeting and projections, operations analysis, office administration, developing accounting and government compliance, risk management and developed financial and accounting reporting procedures.

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**Kiersten Sattler**

**Talent Acquisition Manager, BPM**

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Kiersten is the Talent Acquisition Manager for BPM. She is responsible for the development and execution of recruitment strategies across the firm. Prior to joining BPM, Kiersten started her career in public accounting as an Assurance professional and obtained her CPA.

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**Thomas Schroeder**

**Senior Counsel,**
**University of California,**
**Office of the President**

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Thomas C. Schroeder serves as Senior Counsel in the Office of General Counsel, where he is a member of the Business, Finance and Innovation Group (Nonprofit Organizations & Charitable Giving). Before joining the office in 2013, Mr. Schroeder was Associate General Counsel at The William and Flora Hewlett Foundation and an attorney in the Tax-Exempt Organizations Practice Group at Davis Wright Tremaine LLP. Mr. Schroeder received his A.B. in Art History and English from Bowdoin College, an M.A. in the History of Art from the Courtauld Institute of Art, and his J.D. from the University of Washington School of Law.

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**Christine Selva**

**Sales Executive,**
**Major Accounts, ADP**

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Christine Selva started her career with ADP 15 years ago, and has spent time in the Small Business sector, as well as Major Accounts. Christine has spent her career focusing on helping companies achieve organizational objectives through mitigating risk, ensuring compliance, and streamlining administrative functions as it relates to Human Capital Management. Christine is currently the Sales Executive for ADP Major Accounts in the San Francisco Bay Area.

# Speaker Biographies (continued)

**Jennifer Signori**

**Senior Vice President,
Neuberger Berman**

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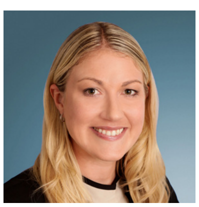
Jennifer Signori, Senior Vice President, joined the firm in 2017. Jennifer is on the ESG and Impact Investing team, responsible for integrating environmental, social, and governance considerations across the investment platform and leading the development of new impact investing strategies across asset classes. Jennifer also plays a significant role in how the firm best conveys its commitment to ESG integration in business and investment practices, which includes thought leadership and client engagement. Jennifer has over ten years of experience in impact investing and financial services. Previously, Jennifer was a Director at Bridges Fund Management, a specialist impact investing private equity fund manager, where she played a key role in establishing the U.S. presence, including new fund development, leading the impact diligence and management of growth equity and real estate investments, investing in social impact bonds, and driving strategic initiatives globally. She began her career in investment banking at J.P. Morgan, where she originated and structured syndicated leveraged loans in the real estate and hospitality sector and public finance bonds in the governmental, transportation, and energy sectors, in addition to conducting credit analysis and portfolio management. Jennifer also worked in a number of both investment and strategic advisory roles focused on impact investing and community development finance, including at Imprint Capital and Next Street. Jennifer received a B.S. of Foreign Service in International Economics from Georgetown University and an MBA in Finance and Entrepreneurial Management from The Wharton School at the University of Pennsylvania. Jennifer is on the board of the Wharton Private Equity Venture Capital Association and the advisory board of the Impact Management Project.



**Victoria Tallman**

**Associate,
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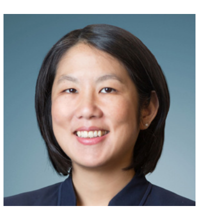
Victoria Tallman concentrates her practice on employment law, providing advice and counsel, and representation in litigation matters. She has experience representing employers in discrimination, harassment, misclassification, retaliation, and wrongful termination cases, in addition to wage and hour matters. Victoria handles both single-plaintiff and class action cases in state and federal court. Her advice and counsel work covers a broad range of employer issues, with a particular focus on misclassification (both for exempt status and employee vs. independent contractor), paid sick leave, background check compliance, social media policies, employee leaves generally, and minimum wage ordinances, as well as drafting and revising employee handbooks.



**Jean Tom**

**Partner,
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Jean represents a diverse array of nonprofit organizations, including public charities, private foundations, social welfare organizations, and trade associations, on corporate, tax, and regulatory matters both domestically and internationally. She counsels on entity choice and formation, tax compliance, grantmaking, governance matters, executive compensation, and organizational structuring (e.g., subsidiaries, affiliates, joint ventures, and mergers). Jean also advises clients on public and private partnerships, political intervention and lobbying, and program-and mission-related investments. A frequent speaker on matters pertaining to nonprofits, Jean has also represented organizations in connection with attorney general investigations and before the IRS.


**David Trepp**

**Partner, IT Assurance, BPM**

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A technology entrepreneur since 1989, David has led over 1,100 information security penetration test engagements for satisfied customers across all major industries throughout the United States and abroad. He has given dozens of presentations to audiences nationwide, on a variety of information security topics. Prior to joining BPM, David was founder and CEO of Info@Risk, a leading comprehensive penetration test firm. David has worked in information security with commercial, healthcare, government, financial, utility, law enforcement and nonprofit organizations since 1998.


**Jackie Vasilatos**

**Director of Strategic Finance, GuideStar**

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Jackie Vasilatos is Director of Strategic Finance at GuideStar. She oversees GuideStar's financial planning and analysis which includes the budgeting, planning and forecasting processes. Works closely with Accounting and Strategy leads on several key projects such as the implementation of Intacct Sage. Before joining GuideStar, Jackie was Director of Corporate Finance at Nasdaq. She has over 15 years of corporate finance experience in the financial services sector.

Jackie earned her MBA from The University of Chicago Booth School of Business and BA from Wagner College. She loves to travel and enjoys spending time with her husband and daughter.


**Shannon Winter**

**Senior Manager, Assurance, BPM**

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Shannon is a leader in the nonprofit industry group at BPM by providing training both internally and externally on a variety of nonprofit topics and specifically on those regarding government compliance. Her experience in public accounting includes providing audit, review, compilation and consulting services to nonprofit organizations and small to medium size private businesses. Her experience for nonprofit organizations includes compliance with Uniform Guidance (formally referred to as OMB Circular A-133) and Generally Accepted Government Auditing Standards (GAGAS). She has also consulted with clients regarding strengthening internal controls and compliance with recipients of local and federal awards. She has worked with both for-profit and nonprofit entities which have received local, state, and federal funds and require federal compliance audits. Her experience includes working with organizations that provide medical assistance to those with mental health issues, substance abuse, financial and housing assistance for low-income and at-risk veterans, individuals, and families as well as the physically disabled homeless, and membership organizations. Shannon enjoys helping organization present their financial results and tell their story. Shannon is a graduate of Santa Clara University with a bachelors degree in accounting.

# About BPM

Founded in 1986, BPM is one of the largest California-based public accounting and advisory firms, ranked as one of the 50 major firms in the country. With six offices across the Bay Area—as well as offices in Oregon, Hong Kong and the Cayman Islands—we serve emerging, mid-cap, and closely-held businesses as well as high-net-worth individuals in a broad reach of industries. From financial services, technology, life science and consumer business to real estate, nonprofits, wine and craft beverages, we are committed to the success of our clients.

When BPM established its Nonprofit Industry Group over three decades ago, one of our founding goals was to make a significant difference in the way nonprofits were served by those in our industry. With their tight budgets and limited staff, they needed a better solution to the way they handled their finances.

Today, our group contains over 60 professionals who employ a full-service approach to accounting for nonprofits. We assist with auditing and tax preparation, consulting, outsourcing, technology, and investment consulting–areas in which changes occur frequently and up-to-date information is key to making decisions.

We understand the unique operational and financial challenges faced by nonprofits. With a strong commitment to the community we have served on many of their boards and have aided hundreds of nonprofit organizations—firsthand. This experience allows BPM to offer nonprofits the most value and the best service available in the marketplace today.

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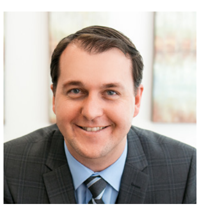

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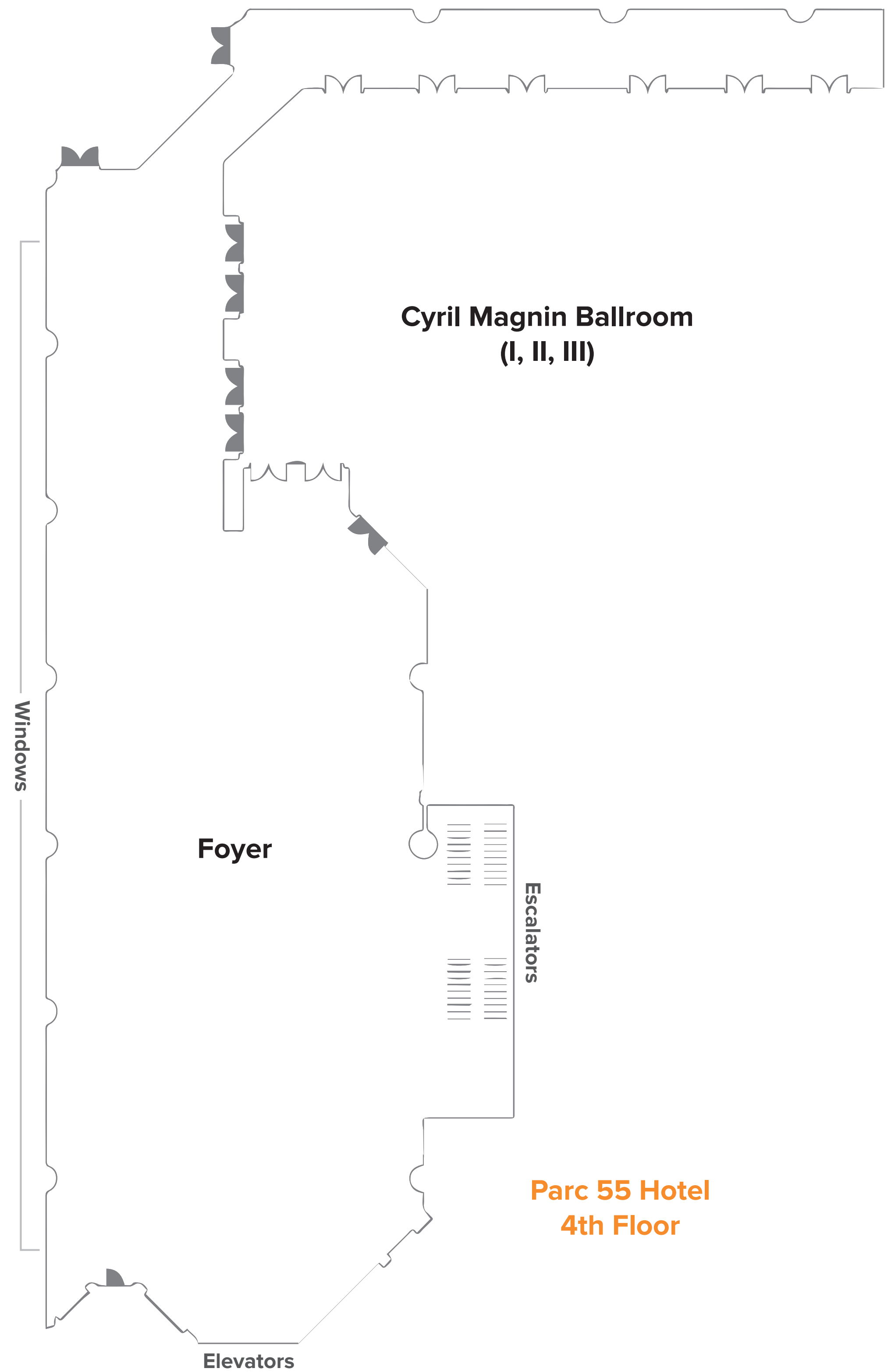
# Map




**Note:** Mission Room—4th floor hallway past elevators
Powell Room—take escalators to 3rd floor

# Notes