FinNext is an intensive learning and sharing event customized exclusively for the FP&A community.

WHERE FINANCIAL PROFESSIONALS MEET TO CREATE WHAT’S NEXT

Register Now
www.FinNext.org
It’s a great time to be in FP&A. CEOs are looking to FP&A professionals to drive the strategic performance of organizations. Why? Because by its very nature, FP&A is positioned to be a strategic partner across the entire organization.

FP&A brings its unique skillset to sales, operations, manufacturing, R&D, as well as support areas like IT, HR and legal. It’s that kind of positioning that helps connect the dots across a variety of issues while working towards the business objective at the core of the project.

FinNext is where you can learn new ways to find insight into those value-added benefits your CEOs are looking to you for, as well as the place to sharpen your practical knowledge.

**LEARN**
Two and a half days of sessions that include presentations, case studies, vendor showcases and more.
Earn up to 11.4 credits.

**NETWORK**
These are your people. Talk shop and build your network of FP&A professionals. The connections you make here are the connections you can turn to all year long.

**RECHARGE**
Discover new ways of thinking about work, hear from inspiring speakers and get motivated to implement new ideas.
### SCHEDULE AT-A-GLANCE

**SUNDAY | March 18**

- 3-7 p.m. Registration
- 3:30-5 p.m. FP&A Roundtable (RSVP Required)
- 5-6:30 p.m. Opening Reception

**MONDAY | March 19**

| Time       | Event                                                                 
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<tr>
<td>7 a.m.-6:30 p.m.</td>
<td>Registration</td>
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<tr>
<td>7-8 a.m.</td>
<td>Breakfast</td>
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<td>8-9:30 a.m.</td>
<td>Opening Keynote</td>
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<tr>
<td>9:30 a.m.-6:30 p.m.</td>
<td>Tech Lounge Open</td>
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<td>9:30 a.m.-6:30 p.m.</td>
<td>AFP Aware</td>
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<td>9:30-10 a.m.</td>
<td>Networking &amp; Refreshment Break/Tech Lounge Activities</td>
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<tr>
<td>10-11:15 a.m.</td>
<td>Session Block 1</td>
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<td>11:15 a.m.-12 p.m.</td>
<td>Networking Break/Tech Lounge Activities</td>
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<td>12-1:15 p.m.</td>
<td>Lunch Break</td>
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<td>1:15-2:30 p.m.</td>
<td>Session Block 2</td>
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<td>2:30-3 p.m.</td>
<td>Networking &amp; Refreshment Break/Tech Lounge Activities</td>
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<td>3-4:15 p.m.</td>
<td>Session Block 3</td>
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**TUESDAY | March 20**

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<tr>
<td>7-10:30 a.m.</td>
<td>Registration</td>
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<tr>
<td>7-8 a.m.</td>
<td>Breakfast</td>
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<td>8:15-9:30 a.m.</td>
<td>Session Block 4</td>
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<td>9:30-10:30 a.m.</td>
<td>Tech Lounge Open</td>
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<td>9:30-10:30 a.m.</td>
<td>AFP Aware</td>
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<tr>
<td>9:30-10:30 a.m.</td>
<td>Networking &amp; Refreshment Break/Tech Lounge Activities</td>
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<tr>
<td>10:45 a.m.-12 p.m.</td>
<td>Closing Keynote</td>
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*WHAT’S A PECHA KUCHA?*

Think speed dating, but for finance presentations. Listen to focused, fast-paced, 7-minute sessions on key tips and tricks, and vote for your favorite hack.

**Sessions Include:**

- Hacking the Budget
- Goal Seek & Solver Hacks to Support Decision-Making
- Analysis Hacking with DAX
- How to Win Data & Influence Strategy

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Register Now
www.FinNext.org
OPENING KEYNOTE

THE ART AND SCIENCE OF PREDICTION

Corporations and governments spend fortunes on forecasting every year, but realistically we are all forecasters in some shape or form. We frequently draw conclusions and make decisions based on the analysis of experts, complex models and even our own pre-conceived notions; but how often do we bother to ask how accurate are these forecasts really? In this provocative presentation, based on his New York Times bestseller, Superforecasting, Dan Gardner explores the style of thinking most likely to deliver accurate forecasts and how we can target our efforts to become better forecasters.

DAN GARDNER
Journalist and Co-Author
Superforecasting

FEATURED KEYNOTE

THE KNOWLEDGE ILLUSION

How do we grow as communicators, leaders and business partners? Stop assuming we know more than we do. Humans have built hugely complex societies and technologies, but most of us don’t even know how a pen or a toilet works. How have we achieved so much despite understanding so little? The answer is that we survive and thrive despite our mental shortcomings because we live in a rich community of knowledge. FP&A professionals are constantly drawing on information and expertise stored outside of their own heads: in their environment, tools and communities, even if they don’t realize it. Phil Fernbach leads an eye opening discussion that makes you challenge the assumptions you make every day.

PHIL FERNBACH
Professor of Marketing
University of Colorado
Leeds School of Business
Co-Author
The Knowledge Illusion
CLOSING KEYNOTE

THEORY VS. REALITY: TRANSFORMING THE FP&A ORGANIZATION

While there is continuous talk of the need to radically change the FP&A organization, what does this mean and what are the actual challenges that face those leading this endeavor? Acclaimed author and organizational change expert, Ori Brafman leads a panel of FP&A leaders who share their experiences overseeing such a herculean effort. From change management strategy to decisions impacting personnel and technology, the panel shares their key learnings to support your transformation efforts.

PANELISTS:

JEFF ALTMAN, CPA  
Director, FP&A for Media & Telematics  
Verizon

JORDAN KRUGMAN, CTP  
Head of Finance and Corporate Services, North America  
Invesco Ltd.

GAILEON THOMPSON, CTP, FP&A  
Senior VP, Global Consumer O&T Finance  
Citi

BREAKOUT SESSION SPEAKERS

CRAIG ANDERSON  
Senior Manager, Financial Planning & Analysis  
Tunein

KARL APPLEBY  
Director of Content Management and Advanced Analytics  
Bayer HealthCare

SHAWN BLEIMEHL, FP&A  
Director, Financial Planning & Analysis  
ICMA Retirement Corporation

RANDALL BOLTEN  
Chief Executive Officer  
Lucidity

JONATHAN CRANE, FP&A  
Senior Manager FP&A  
Hamilton Company

PETER W. GEILER, FP&A  
Fiscal Director  
Child, Family and Community Services

MICHAEL HIGH, FP&A  
FP&A Director, Deepwater  
Royal Dutch Shell plc

ALEX LADD  
Senior Partner  
MindStream Analytics

BRYAN LAPIDUS, FP&A  
Associate Director  
Allegiance Advisory Group

KERMAN LAU  
Vice President of Finance  
Adaptive Insights

KIRBY LUNGER  
Partner  
Performance Architects

MITCH MAX  
Founder & Partner  
BetterVu

FREDDY MINI  
Chief Executive Officer  
Netvibes

SAUMYA MOHAN  
Americas Region Treasurer  
Tesla Inc

CHRISTOPHER E. ORTEGA  
Senior Finance Manager  
Emarsys North America

ODILE ROUJOL  
Advisor in Residence  
NextWorld Capital

DEAN SORENSEN  
Founder  
IBP Collaborative

JESPER HYBHOLT SORENSEN  
Senior Finance Director  
Oracle
AI & THE FUTURE IMPACT ON FP&A
In the short and long term, the impact of AI and machine on FP&A is expected to be transforming. Companies will see faster financial/non-financial data delivery, higher team efficiency to open the way for more focus strategies and partnerships. This session provides an overview of machine learning, artificial intelligence and key technologies impacting the FP&A practice. Additionally, attendees gain an understanding of the trends and factors affecting the execution of AI and machine learning in their organizations.

DATA VISUALIZATION: THE FOUR ALL-IMPORTANT QUESTIONS WE OFTEN FORGET TO ASK OURSELVES
Data visualization is one of today's hottest buzzwords in FP&A, and the conventional wisdom is that pictures and graphs always work better than tables. Not necessarily. Done poorly or thoughtlessly, graphical numbers presentations not only will fail to get your most important points across, but may cause your audience to question your professionalism and even your integrity. This interactive discussion will examine four key questions information presenters should ask themselves. The answers provide attendees with strategies for how they communicate data and suggest presentation alternatives that may be even more effective than graphs.

FINANCIAL MODELING ON THE CLOUD: DEFYING GRAVITY TO GRAVITATE TOWARDS THE CLOUDS
A cloud based solution for your modeling needs can really change the way you view things, from the tiniest bit of data to the most complex of business problems. A cloud-based solution is undeniably simple to use with several benefits, but proceed with caution as it will affect the people, process and technology within your organization. This discussion provides attendees with an understanding of some of the challenges, benefits, and risks with moving the organization's financial modeling and analysis to the cloud while also providing tactics for making the transition a successful one.

BUSINESS PARTNERING: DEVELOPING THE MINDSET OF A STRATEGIC PARTNER
Successful business partnering is about having the right mindset—understanding how to move away from being the traditional trusted scorekeeper to a strategic partner. While the trusted scorekeeper performs the traditional FP&A tasks such as reporting, variance analysis and budget setting, the strategic partner understands how to add value to the organization by presenting actionable insight, which subsequently influences decision makers and impacts the strategic direction of the company. Attend this session for a discussion of what it takes to master these skills and become a true strategic partner.

FOLLOW THE YELLOW BRICK ROAD: ESTABLISHING A FINANCE TRANSFORMATION ROADMAP
Today's business leaders and finance professionals grapple with unprecedented complexity, uncertainty, and risk; thus traditional frameworks, methods, and tools are not sufficient. For many organizations, core business processes, technology platforms, data management and organizational structures do not provide the flexibility and real-time access to information capabilities necessary to guide decisions and optimize business performance. To address these challenges, organizations need a holistic, intentional game plan that provides a clear path forward. This session introduces and illustrates the key elements of a finance transformation roadmap that demonstrates a process for crafting and then socializing a well-designed roadmap.

VOLATILITY IS THE NEW NORMAL
Volatility is the new normal in all spheres of the FP&A profession which presents a unique set of challenges for planning professionals. Forecasting for periods of volatility, setting reasonable planning targets, and trying to determine what a “good” forecast really is are just some of the issues practitioners face. Attend this interactive expert discussion and walk away with tangible tactics and strategies to support the accuracy and sustainability of your forecasts in this volatile world.
Adding Predictive Modeling to Your Forecasting Process

Companies that are deciding whether to add predictive analytics to their forecasting process must also consider questions such as where should the process start; how should it be incorporated into the current process; and which pieces of the process does it replace? The answer depends on the organization and its data. Attendees of this session will walk away with strategies to help their organization begin the journey of adding predictive analytics to their forecasting processes.

Cost Planning: Innovations for Integrated Business Planning

Measuring the cost and profitability of products and customers is a critical FP&A function. However, implementing and sustaining effective costing programs has long been a challenge due to cost, complexity, and the lack of alignment between costing and planning. Through the use of innovative technologies, methods, and a radical re-thinking of approaches, cost analytics can be quickly and efficiently developed and then integrated into the planning process. This session provides an overview on linking activity-based costing to planning that includes a demonstration of how this capability can be deployed as part of an integrated business planning approach.

Getting the Band Back Together: How to Find (and Keep) FP&A Rock Stars

Finding and retaining high-performing FP&A practitioners is a challenge in every organization. Hear from FP&A leaders who offer proven tactics that address both ends of this dynamic issue. Attendees of this session walk away with individual and organizational techniques to better identify, hire, develop and retain high-performing FP&A staff.

Leveraging Prescriptive Analytics to Close Complexity Gaps

In simple terms, prescriptive analytics is a mature form of driver-based planning. When embedded into financial processes, it enables 4 incremental capabilities that result in vast improvements to rolling forecasts, scenario planning, integrated business planning, tax planning, and profit, cash flow, FX exposure forecasting. Collectively, these capabilities enable effective complexity management—a business competency that can improve profits by 3% to 5% of sales. In this session, learn about the nature of prescriptive analytics and how the processes it enables can play a pivotal role in transforming finance into more effective business partners that drive strategy execution and profitable growth.

Presenting Complex Data Analysis to Executives & Boards

While FP&A practitioners are adept at producing quality data, they are challenged with finding the most effective way to clearly convey key findings and insights to decision makers, executives, and boards. Attend this session to learn how to use simplified and concise reports, select relevant information important to your audience, and formatting to eliminate confusion, save time and be a better, more effective business partner.

Using Online Data and Social Analytics to Drive Better Decision-Making

By capturing a wide variety of new information from across the internet, including news and social media, and analyzing the data alongside internal company metrics, decision makers can uncover critical insights that lead to success. Utilizing real world case studies, attendees of this session learn tactics for leveraging new types of data to ask critical questions that lead to real-time insights and ultimately drive better decision making.
THOUGHT LEADERSHIP SERIES
Short, carefully prepared talks focused on strategies, processes or techniques that impact finance practitioners or the industry as a whole, foster learning, inspire or support personal development. The session should be up to a twenty to twenty-five minute talk by no more than 2 presenters followed by five to ten minutes of audience Q&A.

LEARNING LAB
We’re giving vendors 20 minutes to help solve your biggest issues. Each Learning Lab block will have three vendors offering up their innovative solution to a common challenge, all in a case study format.

PECHA KUCHA
Focused, fast-paced seven minute sessions that may include a maximum of twenty images or slides. Attendees will have the opportunity to vote for their favorite presentation.

INTERACTIVE DISCUSSION/ROUNDTABLE
An experienced facilitator or pair of facilitators leads a group discussion with a clear focus that addresses identified subject matter. Knowledge is shared from both facilitators and the session attendees.

EXPERT PANEL
An informed discussion and/or debate on a topic by up to three people with contrasting or complementary points of view, moderated by a chairperson, with time reserved for audience participation, questions, and comments.

INTERVIEW OR MODERATED DISCUSSION
May feature an expert who is confident with addressing a whole range of questions and a skilled moderator who can lead an engaging discussion and moderate audience Q&A.

CASE STUDY/SIMULATION
Analysis of persons, groups, events, decisions, periods, policies, processes, or other systems that present a problem followed by a path for resolution.

CREDITS
FinNext is approved for a maximum of 11.4 FP&A, CTP/CCM and CPE continuing education credits.

AFP AWARE
You will have the opportunity to be part of an impactful program called Project Night Night, which provides packages to local homeless children. Studies have shown that providing objects of comfort can create a sense of security, reduce trauma and greatly influences the overall well-being of children. Our goal is to pack 100 “Night Night” bags—a packing station will be set up in the main hall way at FinNext.
> SPONSORS

**GOLD SPONSOR**

**host analytics**

**HOST ANALYTICS**

Host Analytics is the industry’s leading provider of scalable, cloud-based enterprise performance management (EPM) systems. Companies of all sizes, from $10M startups to $10B multi-nationals, rely on Host Analytics to provide financial planning, budgeting, modeling, consolidations, and reporting. More than 700 customers use Host Analytics including Bose, Boston Red Sox, Burlington, FitBit, La-Z Boy, Mayo Clinic, NPR, OpenTable, Peet’s Coffee, Pinterest, Sanmina, SwissPort, Tom’s Shoes, True Value, ULTA, and Vitamin Shoppe. Host Analytics is a private company backed by leading venture capitalists with customers in over 90 countries.

**BRONZE SPONSORS**

**ANAPLAN**

Anaplan enables you to connect data, people, and plans across both finance and operations to transform how your company plans. Plan the way you want to plan using advanced techniques, such as driver-based forecasting, rolling forecasts, and zero-based budgeting. Add value by performing strategic work, rather than just consolidating spreadsheets. Collaborate with the entire business instead of working in a finance silo. Change the way your company plans, and lead the finance transformation at your organization with continuous, connected planning that bridges finance and operations.

**BOARD**

BOARD is a global decision-making platform for organizations of any size. Since 1994, BOARD has enabled more than 3000 companies worldwide to rapidly deploy Business Intelligence, Corporate Performance Management and Predictive Analytics applications in a single unified and interactive environment. The BOARD platform allows companies to achieve a single, accurate and complete view of business information, and full control of performance across the entire organization, from strategic formulation down to operational execution. On-premise or cloud-based, BOARD has been implemented in over 100 countries.

**MINDSTREAM**

FP&A professionals have their hands full in Budgeting and Forecasting, Acquisition and Divestiture modeling, and ensuring data quality from multiple sources. MindStream is here to help make your lives easier through a combination of technology and best practices. MindStream Analytics is a leading consulting firm focused on helping clients improve business performance and decision making. With years of experience in Analytics and Reporting, we offer services ranging from software selection and implementation to our award-winning managed services.

**VENA SOLUTIONS**

Vena Solutions redefines how medium and large sized companies manage their budgeting, planning and revenue forecasting. Vena combines a centralized database, sophisticated workflow, powerful reporting and advanced analytics with Excel to create a cloud-based corporate performance management (CPM) solution. The best companies in the world use Vena to get trusted numbers and insights fast. Vena is the fastest growing cloud CPM company and the only one to embrace—not replace—Excel.
> REGISTRATION

THREE WAYS TO REGISTER
Online:  www.FinNext.org
Fax:  301.907.2864 (Credit card payments only)
Mail:  AFP, P.O. Box 64714, Baltimore, MD 21264 (Check payments)

> Printable registration form located at www.FinNext.org

PRICING

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Team Registration is available. Please contact Justin Barch at jbarch@AFPonline.org.
If you are not a current AFP member, the non-member rate includes one year of membership in addition to your FinNext registration.

WHERE TO STAY

THE GRAND HYATT SAN FRANCISCO
345 Stockton Street
San Francisco, CA 94108
> Book Your Room

Special Group Rate of $339/Night if you book your room by February 26, 2018.

GETTING HERE AND GETTING AROUND

Wondering how to get to/around the city? Fly in to San Francisco International Airport (SFO) located 13 miles south of downtown or Oakland International Airport (OAK), which is approximately 20 miles away from San Francisco.

Check out this San Francisco Travel site to learn about all the different public and private transportation options available to you. This includes the BART rapid rail, which gets you from either airport to downtown for about $10, $20 roundtrip. You’ll also want to try using the historic cable cars to get around the city for a classic taste of San Francisco.

CREDITS

FinNext is approved for a maximum of 11.4 FP&A and CTP/CCM continuing education credits. Credit is earned at the rate of one credit per 50 minutes of educational session time, including questions and answers.

To report your credits after participating in sessions, you will need to manually enter that information into your Online Recertification record at www.AFPonline.org/Recert.
The Association for Financial Professionals (AFP) is the professional society committed to advancing the success of its members and their organizations. AFP established and administers the Certified Treasury Professional and Certified Corporate FP&A Professional credentials, which set standards of excellence in finance. Each year, AFP hosts the largest networking conference worldwide for over 6,500 corporate finance professionals.

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