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Fall 2026 CFO Bootcamp

FEI San Francisco Bay Area is pleased to sponsor our virtual **Fall 2026 CFO Bootcamp**, featuring **six sessions in October and November 2026**. Now in its **13th cohort**, the Fall 2026 Bootcamp is designed to complement our Spring Bootcamp held in April and May.[1]

The CFO Bootcamp program is tailored for senior finance and accounting professionals preparing for the CFO role, as well as current CFOs seeking to sharpen their strategic and leadership skills. The program was recognized with FEI's Innovation Award – which honored one FEI chapter for an initiative demonstrating creativity and out-of-the-box thinking. Recent CFO Bootcamp cohorts have included approximately **40 to 45 senior executives** – including current and aspiring CFOs, VPs and Directors of Finance, Chief Accounting Officers and Controllers, fractional CFOs, and senior executives across a range of functions – from start-ups through large public companies.

The Fall 2026 CFO Bootcamp includes six sessions covering **CFO and the Law, Financial Management, Strategic Planning and FP&A, and Leadership and Managing Talent**. We'll also dive deep into **Fundraising and Capital Structure** with two dedicated sessions – **one focused on Equity Financing and a second session dedicated to Debt Financing**. Together, these sessions provide a comprehensive foundation for finance leaders navigating today's complex business and financial environment.

Virtual sessions will be held on successive Wednesday afternoons/evenings from October 14 through November 18 (with the exception of the Tuesday, November 10 session). Each session runs from 4pm to 7pm PT, and time for networking will take place before each session. The program also includes an in-person social event in San Francisco in December.

Each session will feature expert presenters and panelists, including an **Executive in Residence** who will provide mentorship and share perspectives and real-world experiences. In addition, every session will include a collaboration activity with time for scenario sharing, problem solving, and interaction with fellow Bootcamp attendees. Attendees will also have access to recordings and all presentation/reference materials from each session through a dedicated Bootcamp website, providing an ongoing resource beyond the live program.

Please see pages 3 to 8 for further details on each session.

SPACE IS LIMITED – Applications are reviewed on a rolling basis and early submission is encouraged. *See the QR code for the Bootcamp application. Please contact chapter.admin@fei-sfba.org with any questions.*
Final application deadline: October 12, 2026

Bootcamp application QR code:

or visit:
Fall CFO Bootcamp application link

[1] The next Spring Bootcamp will be held in April/May 2027. See page 10 for Spring session topics. *Note that attending a prior Spring Bootcamp is not required to attend the Fall 2026 CFO Bootcamp.*

Dates and Times: Please see pages 3 to 8 for session dates and times.

Format: Interactive virtual meetings

Investment & Early Bird Discount:

Early bird deadline – Submit your application by **9/18** and complete payment by 9/25 to secure the early bird, reduced rates below.

- FEI SFBA Members & All In-Transition:
  $179 Early Bird ($199 Standard)
- Members of other FEI Chapters:
  $369 Early Bird ($399 Standard)
- Non-Members:
  $449 Early Bird ($499 Standard)

Bootcamp participants are eligible for discounted FEI SFBA chapter membership, which can substantially offset the cost of the program. Details will be provided during Bootcamp.

CPE credits: 21.5 CPE credits

What Participants Say About the CFO Bootcamp

" *I highly recommend the FEI SF Bay Area CFO Bootcamp for finance leaders looking to stay current and prepare for the evolving demands of the CFO role.* ***The curriculum is grounded in real-world challenges, including governance and AI, making it valuable for both current and aspiring CFOs.*** *I left with new perspectives, actionable ideas, and a stronger appreciation for the expanding role of finance leadership.*

" ***Excellent content and interactive format!*** *I found it* ***highly valuable****, and I am excited to apply the insights I gained. It was a pleasure interacting in virtual workshops with such an* ***inspiring group of finance leaders.***

" *The FEI SF Bay Area CFO Bootcamp was a* ***unique opportunity to interact on a peer-to-peer level …*** *the program allowed me to gain* ***30 to 40 great networking contacts*** *and obtain valuable knowledge and insight into SF Bay industries and trends for CFOs. The Bootcamp is structured with timely topics to sharpen your existing skills with top notch discussion leaders in an open forum setting that offers* ***valuable takeaways as well as continuous networking*** *throughout the program.*

" *I enjoyed* ***the camaraderie of fellow 'classmates'*** *and found the content to be on-point. Especially helpful was the insight from the industry practitioners. The Bootcamp gave a* ***comprehensive snapshot of a CFO's life*** *and identified developmental needs.*

" *The CFO Bootcamp is a* ***great way to meet other finance executives*** *and to discuss the many hats worn by a CFO. The wide range of experiences of speakers and attendees led to insightful discussions, and the virtual format made it easy to participate. Both enjoyable and enlightening. Highly recommend!*

" *The sessions and material were all* ***very well organized and presented.*** *Really impressed with the* ***quality of the presenters and their presentation materials.***

" *Great format to* ***hear from people who have traveled the path*** *and hear their stories and insights in terms of* ***how to be successful getting and staying there!***

" *I* ***absolutely loved the CFO Bootcamp****, I thought it was organized so well with some* ***truly phenomenal panelists.*** *I was very happy to be a part of it and* ***learn from some of the best!***

" *The CFO Bootcamp was terrific! I thought all of the* ***guest speakers and panels were excellent*** *and all of the topics for discussion were* ***spot on.***

Please see pages 3 to 8 for details on the six Fall Bootcamp sessions.

Program Schedule

I: CFO and the Law

Oct 14: 4pm – 7pm PT
Networking from 3:30pm – 4pm PT

3.5 CPE credits (Business Law)

The CFO often has the responsibility for legal matters – whether supervising in-house counsel or coordinating with outside legal advisors. While not typically attorneys themselves, **CFOs must develop a working understanding of critical legal issues to make sound business and financial decisions.** Beyond ensuring compliance, the CFO plays a central role in protecting the organization against risk, maintaining strong governance, and supporting ethical leadership.

This session will provide a broad overview of the legal issues that CFOs most often encounter – including corporate governance and fiduciary duties, securities and investor disclosure, contract negotiation and management, employment law, privacy and cybersecurity, and regulatory compliance.

We will also address the rapidly evolving legal landscape surrounding AI, which cuts across each of the areas above and raises new questions of liability.

Across these areas, the emphasis will be practical – recognizing the issues that matter, knowing when to escalate and when to bring in counsel, and documenting decisions in a way that protects the organization.

Collaboration activity: Case studies with breakout groups

Instructors:
- *Speaker: Lisa Liu – Partner, Sand Hill Law Group*
- *Additional speakers to be announced*

Program Schedule

II: Financial Management | ***Oct 21: 4pm – 7pm PT*** | 3.5 CPE credits (Accounting, Management Services)

Networking from 3:30pm – 4pm PT

The CFO's primary role is the overall financial management of the company – ensuring that the books are accurate, cash is managed effectively, tax obligations are met, and the organization is audit-ready. This session will unpack the four core disciplines of financial management: **accounting, audit, treasury, and tax**, with practical insights from leaders across these functions.

A CFO may not have deep experience in each of these areas but must understand their role, function, and when it is necessary to dig deeper. The session is framed around what a CFO needs to know to provide effective oversight – rather than the technical depth a specialist in each function would require.

Experts from accounting, audit, treasury, and tax will share how they interact with CFOs, highlight what works well (and what doesn't), and outline the key aspects CFOs should: (i) know, (ii) understand, and (iii) actively engage with in each area. Speakers will also address how needs in each area evolve as companies grow – from early-stage through mid-market to large and public companies.

We will also highlight how **AI is reshaping financial management**, from automating close processes, forecasting, tax compliance, and audit sampling to improving risk monitoring and anomaly detection. At the same time, we will discuss the importance of oversight, accuracy, and ethics to ensure AI-driven insights support sound financial decision-making.

Collaboration activity: Breakout group discussion

Instructors:

- *Moderator/Executive in Residence: Jim Stuebner – CFO, Secure Code Warrior*
- *Speaker: Travis Combs – Managing Director, Accounting Advisory, Riveron*
- *Speaker: Jones Lam – Head of Tax, Accordance; President of the Tax Executives Institute, San Francisco Chapter*
- *Speaker: Will Vogelsang – Principal, Baker Tilly*
- *Additional speakers to be announced*

Session Contributor: Kristin Mauer, Baker Tilly

Program Schedule

III: Strategic Planning and FP&A ***Oct 28: 4pm – 7pm PT*** 3.5 CPE credits (Finance)
Networking from 3:30pm – 4pm PT

Financial Planning & Analysis is the one area of Finance that touches every part of an organization. Often, the Head of FP&A serves as the CFO's right hand, providing the analysis, insights, and agility needed to guide decision-making.

This session will cover FP&A roles, responsibilities, and structure. We will delve into the many aspects of the FP&A function, including **strategic planning**, **budgeting, business partnering, reporting, and dashboards.** In addition, we will highlight other specialized areas where FP&A often has a leadership role – such as **profitability analysis, digital transformation, data governance, and FP&A systems.**

Throughout the session, we will share best practices (and cautionary tales of worst practices) drawn from real-world examples, as well as techniques to build trust and collaboration across the organization.

AI's impact on FP&A will be addressed in the Supplemental Session below.

Collaboration activity: Breakout teams will tackle a real-life scenario – to analyze a situation and debate different approaches and solutions

Instructor:

- *Speaker/Executive in Residence: Glenn Snyder – Senior Director, Interim Management at Riveron; former VP of FP&A at Vacasa, Mobileum, Zazzle, and Digital Realty*

Supplemental Session: ***Nov 3: 12pm – 12:45pm PT*** 0.5 CPE credits (Finance)
AI in FP&A – Perspectives from the Field

Instructors:

- *Speaker: Valerie Martin – Strategic Finance Executive and Advisory Board Member; former Senior Director, Finance at Autodesk*
- *Speaker: James Myers – Founder and CEO, FP&A Strategy Consulting*

Program Schedule

Sessions IV and V – Fundraising and Capital Structure

A critical component of the CFO's role is managing the company's capital structure to ensure sufficient liquidity to execute strategic goals – a task shaped by the current interest rate environment, valuation dynamics, and the state of M&A and IPO activity. To address this broad topic, the Bootcamp features two dedicated sessions: **one focused on equity financing and another dedicated to debt financing**. Together, these sessions will examine the pros and cons of different funding solutions, steps to prepare for financing, key structuring considerations, and strategies for maintaining liquidity and financial flexibility.

IV: Equity Financing

Nov 4: 4pm – 7pm PT
Networking from 3:30pm – 4pm PT

3.5 CPE credits (Finance)

This session will focus on the equity side of capital raising, from **preferred stock rounds to public company offerings**. Panelists will unpack key terms in equity financing – including liquidation preferences, participation rights, conversion mechanics, and valuation considerations – and explore how these terms shape ownership, board dynamics, governance, and long-term strategy.

Real-world examples will illustrate how negotiations play out in practice and the impact specific terms can have on company operations, follow-on financings, and exit strategies. Finally, we will touch on market dynamics affecting equity fundraising today – from valuation pressures to investor expectations – and what CFOs should anticipate when navigating an equity raise in the current environment.

Collaboration activity: Case studies with breakout groups

Instructors
- *Moderator/Executive in Residence: Robert Miller – Partner, CFOs2Go; former CFO of Nivagen Pharmaceuticals Inc.*
- *Speaker: Josette Ferrer – Managing Director, Clairent Advisors; FEI SF Bay Area President*
- *Additional speakers to be announced*

Program Schedule

V: Debt Financing

Nov 10: 4pm – 7pm PT**

****Note this session is on Tuesday**

Networking from 3:30pm – 4pm PT

3.5 CPE credits (Finance)

This session will focus on the debt side of capital raising, covering options ranging from venture debt and revenue-based financing for early-stage companies to revolving credit facilities and traditional term loans for more established businesses to restructuring and distressed debt.

Panelists will discuss the **strategic role of debt** in a company's capital structure, including how its use evolves as a business scales – from serving as a growth accelerator for **startups**, to funding expansion and acquisitions for **middle market companies**, to decreasing the cost of capital and supporting shareholder returns for **large public companies**. Real-world examples will highlight both the opportunities and risks debt presents at each stage, along with current market conditions and what CFOs should anticipate in today's lending environment.

Collaboration activity: Case studies with breakout groups

Instructors

- *Moderator/Executive in Residence: Robert Miller – Partner, CFOs2Go; former CFO of Nivagen Pharmaceuticals Inc.*
- *Speaker: Aamer Pervaiz – Senior Vice President, Fifth Third Bank*
- *Additional speakers to be announced*

Program Schedule

VI: Leadership and Managing Talent ***Nov 18: 4pm – 7pm PT*** 3.5 CPE credits (Personnel/HR)
Networking from 3:30pm – 4pm PT

Managing talent is one of the most critical aspects of not just a CFO, but any leader. High turnover, low engagement, and limited development opportunities can undermine a finance team's effectiveness and ripple across the entire organization.

In this session, we will explore **practical techniques for keeping teams engaged, leading hybrid/remote teams, motivating employees, and influencing others**. We will also share strategies for effective interviewing and hiring to ensure the right talent is brought into the organization. The session will also address how AI is changing the shape of finance teams – how it has impacted roles, hiring, and skill development – and how CFOs can lead teams whose work is being redefined by AI.

Panelists will share examples of common pitfalls to avoid, as well as stories on how strong people management not only elevated their teams but also helped propel their own careers.

Collaboration activity: Breakout group discussion

Instructors
- *Moderator: Alyssa Graciano – Client Solutions Director, Robert Half*
- *Panelist/Executive in Residence: Kathy DeVillers – CFO, Cakebread*
- *Additional speakers to be announced*

Session Organizers and Contributors from Robert Half: Shannon Tatum and Surbhi Pir

In-Person Event in San Francisco ***Dec 1: 5:30pm – 8pm PT***
Holiday Party & Fall 2026 ***Embarc Wines (2 Embarcadero Center) in San Francisco***
CFO Bootcamp Celebration

It's a double celebration – our chapter holiday party and the close of the Fall 2026 CFO Bootcamp. Bootcampers, speakers, and FEI SFBA members and partners will come together at Embarc Wines to celebrate the season and mark the cohort's completion of the program. It is also a chance to meet in person the people you've spent six weeks with on screen!

Light bites, 80+ wines from around the world, and our holiday sparkle contest – bring the festive colors, glitter, sequins, or anything that twinkles. Prizes awarded for the most dazzling looks.

Other Program Information

Participants in prior CFO Bootcamps have included senior professionals from*:

Alphabet (Nasdaq:GOOGL)	Coupa Software	Macquarie Airfinance	Plaid
Alumis (Nasdaq:ALMS)	Cowbell Cyber	Marin Software (Nasdaq:MRIN)	Ramar Foods
Annaly Capital Management (NYSE:NLY)	CSE Insurance	Medtronic (NYSE:MDT)	RingCentral (NYSE:RNG)
Apple (Nasdaq:AAPL)	Dave & Buster's	Metromile (Nasdaq:MILE)	Roku (Nasdaq:ROKU)
Autodesk (Nasdaq:ADSK)	Drawbridge Realty	Mitek Systems (Nasdaq:MITK)	ServiceNow (NYSE:NOW)
BlackLine (Nasdaq:BL)	eBay (Nasdaq:EBAY)	Mitsubishi UFJ Financial Group (TSE:8306)	Star Therapeutics
Blue Shield of California	Fandom	The Myers-Briggs Company	Stripe
Burkland Associates	Gensler	Nokia Corporation	Uber Technologies (NYSE:UBER)
California Bank of Commerce	Grocery Outlet (Nasdaq:GO)	One Medical (Nasdaq:ONEM)	Urban Remedy
Chevron Corporation (NYSE:CVX)	Hanson Bridgett, LLP	Owens Corning (NYSE:OC)	Vagaro
Corsair Gaming (Nasdaq:CRSR)	Jam City	PageBites	Zscaler (Nasdaq:ZS)

Prior CFO Bootcamp instructors have included executives from*:

Advanced Micro Devices (Nasdaq:AMD)	DocuSign (Nasdaq:DOCU)	Narvar	Secure Code Warrior
Airbnb (Nasdaq:ABNB)	Envestnet (NYSE:ENV)	OpenAI	Smartsheet (NYSE:SMAR)
Anaplan, Inc.	Fifth Third Bank (NYSE:FITB)	Ouster (NYSE:OUST)	Telecare Corporation
Baker Tilly	FLG Partners	Planet Labs	Udemy (Nasdaq:UDMY)
BMO Financial Group (NYSE:BMO)	Fox Rothschild LLP	Planful	Vacasa (Nasdaq:VCSA)
Boardwise, Inc.	Franklin Templeton Investments	Playground Global	Varex Imaging (Nasdaq:VREX)
Cakebread Cellars	GitLab (Nasdaq:GTLB)	Protiviti	Wells Fargo & Company
California Olive Ranch	Graybug Vision (Nasdaq:GRAY)	Renew Home	WEX (NYSE:WEX)
CFOs2Go	Life Storage (NYSE:LSI)	Riveron	Willis Towers Watson
CommonSpirit Health	Lyft (Nasdaq:LYFT)	Robert Half (NYSE:RHI)	Wind River Software
CXApp Inc. (Nasdaq:CXAI)	myDNA	Scale Venture Partners	Xpansiv

About FEI

Financial Executives International (FEI) is a nationwide group of more than 10,000 senior-level financial executives organized around 55+ chapters in the U.S. Membership in FEI's San Francisco Bay Area chapter provides senior finance executives in the greater San Francisco, East Bay, North Bay, and just south of SF regions access to many events throughout the year to connect, exchange best practices, as well as participate in professional development sessions on relevant topics and issues. FEI also provides research, webinars, conferences, and publications to its national membership.

** Company names and ticker symbols are aspects which were applicable at the date of each Bootcamp*

Thank you to our Strategic Partners!

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CFO Bootcamp/Programs Committee:

Stephanie Byford BDO	**Rebecca Colman** RPCTax	**Alyssa Graciano** Robert Half	**Steve Lee** CBRE	**Kristin Mauer** Baker Tilly	**Robert Miller** CFOs2Go
Aamer Pervaiz Fifth Third Bank	**Surbhi Pir** Robert Half	**Daniel Sanchez** Wells Fargo	**Glenn Snyder** Riveron	**Matthew Svetich** Riveron	**Shannon Tatum** Robert Half

Committee chaired by Josette Ferrer, Clairent Advisors; FEI SF Bay Area President

[1] The next Spring Bootcamp will be held in April/May 2027, and will include five sessions: (i) Leading Change through Effective Company Culture and Communications; (ii) The CFO Systems and Technology Roadmap; (iii) The Role of the CFO in Risk Management; (iv) The CFO's Contribution to Good Governance; and (v) Becoming a CFO: Real Career Journeys, Pivotal Moments, and What Matters Most.