



YOUTH SERVICES



ADVERTISING SUPPLEMENT | SEPT 23, 2022

CFO OF THE YEAR AWARDS

2022 Lifetime Achievement
KATHY LANCASTER
Kaiser Permanente



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AWARDS

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A LETTER FROM THE EXECUTIVE DIRECTOR OF LARKIN STREET YOUTH SERVICES

With smart partnerships, we can solve youth homelessness

It takes a village to end youth homelessness. At Larkin Street Youth Services, the largest non-profit in the Bay Area serving young people experiencing homelessness since 1984, this village is comprised of skilled staff, resilient young people, and more importantly, strong partnerships with both the private and public sectors.

The Bay Area CFO of the Year Awards celebrates CFOs who serve as role models to our youth. Tonight's CFO finalists and winners demonstrated strong leadership and resilience in the face of many uncertainties in the past two years. We see similar qualities in the young people we serve at Larkin Street as they overcome homelessness and build a stable future for themselves, which is why this event is so meaningful to us. Additionally, the CFO Awards also sustained Larkin Street's programs and has helped us cultivate partnerships in the business community. One of those partnerships is with the San Francisco Business Times and its fearless leader, Mary Huss, who have co-presented this event since its inception.

This year, we are thrilled to announce the expansion of our housing programs adding over a hundred more beds for young people. We are pleased to provide case management and other services at three new housing sites in San Francisco: Casa Adelante, Casa Esperanza, and Mission Inn. Larkin Street is also proud to share its first ever expansion

in Berkeley called Turning Point. Our programs- from our housing, wellness, education, and employment- have always been designed to meet young people where they are. And these new expansions do just that; we are growing where the needs are.

None of this growth is possible without the support of community members like you and through fundraising events like the Bay Area CFO of the Year Awards. Since its inception, this event has raised over \$6.5 million to end youth homelessness.

We are so grateful for all the businesses and individuals who have donated their time and resources to the Bay Area CFO of the Year Awards. In particular, our title sponsors Marsh & McLennan Agency and EY have been incredible - with Marsh & McLennan Agency returning for its sixth year and EY for its third year.

My sincere congratulations go out to all of the finalists and winners tonight at the CFO of the Year Awards. They have proved their ability to thrive in the new normal and continue to demonstrate great leadership. Through this event, you are all driving towards a future in which no young person has to sleep on the street again. Finally, thank you for supporting the movement to end youth homelessness



SHERILYN ADAMS
Executive Director
Larkin Street Youth Services

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Zoom is proud to be a sponsor of the Bay Area CFO Awards.



We congratulate our own Chief Financial Officer, Kelly Steckelberg, for her nomination as a finalist, and congratulate all of the excellent nominees on their success.

Zoom is for you. Zoom is a space where you can connect to others, share ideas, make plans, and build toward a future limited only by your imagination. Our frictionless communications platform is the only one that started with video as its foundation, and we have set the standard

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A MESSAGE FROM THE PUBLISHER OF THE SAN FRANCISCO BUSINESS TIMES

Celebrating the good work of CFOs and Larkin Street

Welcome to the 2022 Bay Area CFO of the Year Awards, where we celebrate Chief Financial Officers who support their communities - and Larkin Street Youth Services for the incredibly important work they do in this community. The awards shine a light on the hard work and values that make CFOs great at their jobs, as well as the help those in need get from Larkin Street.

This year's theme "Thriving in the New Normal" is something we've all hoped for, for over 2 1/2 years, and it seems we can really say it and aspire to it now. Last year's CFO Awards event was the first live event many of us attended, and it was as gratifying as ever, though still a little awkward being together in a public space. This year marks a clear turn to that new normal.

CFOs have played an important role as a steadying force throughout these uncertain times. Always, they are essential leaders, helping steer the company to growth, through highs and lows, and key strategic moves. The work and character of these tireless CFOs was a steadying force these past two and a half years, and the work and mission of Larkin Street in providing a haven, support, and a path forward for youth who otherwise would be on the streets has been more important than ever.

A most gratifying aspect of these awards, launched 16 years ago, is the valuable relationships it has forged, as the CFOs and their companies have been introduced to the important work of Larkin Street, and the youth it serves.

The Winners and Finalists recognized this year represent the best of the business community, displaying the professionalism, skill, and strategic acumen it takes to be a truly great CFO. The nomination and selection process are thorough. Our Nominating Committee identifies worthy candidates across the Bay Area, and the Selection Panel narrows the list down to be the best of the best. Candidates are selected based on their scope of responsibilities, tenure, leadership, financial performance, influence, and stewardship. Giving back to community also is considered.

We greatly appreciate all our sponsors who generously support not only the impressive work of the top CFOs but also the outstanding service to Bay Area youth in need that Larkin Street provides.

Check out the Business Times to find out about next year's Bay Area CFO of the Year Awards, and please visit Larkin Street Youth Services (www.larkinstreetyouth.org) to learn more about the life changing work they are doing and discover how you can get involved.

Congratulations to our inspiring 2022 class of top CFOs for their leadership, and congratulations to Larkin Street Youth Services, a leader among the dedicated family of nonprofits in our community that have tirelessly supported the enormous needs of so many in these past months. A special note of gratitude to our CFOs, and to Sherilyn Adams and the entire team at Larkin Street, for the beacon they provide during the most challenging times.



MARY HUSS
Bay Area Market President & Publisher
San Francisco Business Times
& Silicon Valley Business Journal



COMMITTEES AND SELECTION PANEL

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Adam Moise (co-chair)
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SELECTION PANEL

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- Sharon McCollam**
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- Mary Huss**
Bay Area President and Publisher of the Silicon Valley Business Journal and San Francisco Business Times
- Robin L. Washington**
Winner, 2017 Hall of Fame-Lifetime Achievement Award; Former EVP and CFO, Gilead Sciences, Inc.
- Art Fatum**
Retired CFO, MidPen Housing Corporation; former Chair of Bay Area CFO of the Year Awards, Larkin Street Honorary Board Member

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YOUTH HOMELESSNESS IS SOLVABLE



On any given night in San Francisco, there are more than 1,000 young people without a safe place to sleep. Without immediate interventions, half of these young people will likely go on to experience chronic homelessness.

Founded almost 40 years ago, Larkin Street provides comprehensive housing, health care, employment, and education services to young people, ages 12 to 24, experiencing homelessness. They offer a range of housing options from emergency shelters to dorm-style transitional living programs and independent apartments.

Larkin Street believes that wrap-around services will help young people achieve stability. Aside from housing, they also offer several levels of educational services, including GED tutoring and college preparation. Additionally, a range of career and employment services are available, from short-term, paid neighborhood improvement projects to internships and job placements.

On top of providing these basic needs, Larkin Street empowers young people to lead through their Youth Advisory Board. This leadership program is a cohort of young people who inform the agency's advocacy work. In order to truly end youth homelessness, Larkin Street believes that giving young people a seat at the table is essential.

The organization is funded through support from public sources, including the city, state and federal governments, as well as through private gifts from individuals, corporations and foundations. Fundraising events, including the Bay Area CFO of the Year Awards, are another important source of revenue for Larkin Street in their work to serve nearly 1,500 young people every year.

To learn more about Larkin Street Youth Services and their work to end youth homelessness, visit larkinstreetyouth.org.

Deloitte.



Deloitte is proud to support Larkin Street Youth Services and congratulates tonight's finalists for being recognized as the best CFOs in the Bay Area.





Thank you for helping
our community rise

Inspiring people and mobilizing resources to address critical issues is a significant achievement.

We're proud to recognize the work your organization does in our community — making a difference in so many people's lives.

Let's celebrate Larkin Street Youth.

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LIFETIME
ACHIEVEMENT AWARD



KATHY LANCASTER KAISER PERMANENTE

KAISER MEMBERS DESERVE
THE SAME RETURNS AS INVESTORS

We can never say enough in praise of single parents, who dedicate so much of themselves to providing a supportive and healthy life for their children. A single mother herself, Kathy Lancaster is not only extraordinary for what she's accomplished and how she treats her children, but the incredible impression she's left on her coworkers and team members at Kaiser Permanente.

"What's amazing about Kathy is how she models that parenting ethos and she creates a space for it to be really okay," says Rick T. Ginley, Executive Di-

rector at Kaiser. "Kathy is very approachable. She's very engaged and very much a part of her team."

That same ethos was on display when Kathy first became a single parent. "My three children needed me to be more present," she realized. "My role for Prudential had me on a plane every Monday morning. I needed to find an opportunity with 25% travel, not 80% travel. We did look at moving, but we'd already relocated to the Bay Area." After building HMOs for Prudential for 17 years, Kathy resolved to take a step back in her career, but in a place where she could still grow and learn.

I am here to make sure everybody is successful. If I see someone tripping over something, I am all over it.

George Halvorson became CEO of Kaiser Permanente around this time and urged Kathy to apply. “Kaiser was the perfect opportunity to leverage my health-care expertise and expand my knowledge to care delivery. George and I have similar backgrounds, so we came together to move the business together.”

Kathy joined Kaiser in 1998 to do analytics as the organization tried to turn its fortunes around. “I was a one-man-show for analytics,” she says. “I determined what got Kaiser into trouble and how to get them out.”

As CFO, Kathy’s strategy has hinged on understanding Kaiser’s key advantages. “One of the ideas that’s still with us which I brought to the organization is that a nonprofit needs to perform at the same level as a for-profit entity. For-profits pay out to their stockholders, but our surplus goes toward lowering premiums

KATHY LANCASTER

Kaiser Permanente

TITLE Executive Vice President,
Chief Financial Officer

TENURE 2014 - Present

BACKGROUND Prudential Insurance,
Hewlett Packard, Dell, Logitech

and upgrading hospitals,” she says. “Our members need the same return from us as other investors.”

Among her upgrades was one of the area’s first electronic records systems. Perhaps even more importantly, Kathy helped Kaiser prepare for the COVID pandemic.

“Unlike other hospitals whose revenues dropped, ours stayed stable thanks to our pre-paid system,” says Kathy, citing further change on the horizon. “Coming out of the pandemic, our world is going to be dramatically different. We’ll still be doing testing, therapies, and vaccines, and dealing with comorbidities. I think you’ll see the healthcare system become more efficient as a result.”

Kathy’s coworkers appreciate her leadership style, with her focus on mentorship. “Part of mentoring is giving people the courage to step out of their safety zone. Finance people want to keep a very linear career path, but if you stay there you’ll hit a glass ceiling. If you want to optimize, expand your career broadly, I’ve been very instrumental in helping folks round out their resume.”

“I also believe in equity, including diversity. We succeed through diversity of thought, experience, and background. Everybody on my team knows more than I do about something. Coming together collaboratively leads to better decisions than coming up with them on your own.”

Kathy was born in Santa Monica, one of five kids raised by “awesome” parents in a 1500-square-foot house in a cul-de-sac. Her father was a CFO as well. She studied political science and is active in her church. Her son, two daughters, and four grandchildren have followed her example. In her spare time, Kathy enjoys biking, photography, and art.



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AMRITA AHUJA BLOCK



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PwC is proud to support Larkin Street Youth Services as part of our commitment to making a meaningful difference in the world and helping others thrive.

Congratulations to this year's Bay Area CFO of the Year Award winners and finalists!

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DAUGHTER OF IMMIGRANTS KEEPS THE AMERICAN DREAM ALIVE FOR SMALL BUSINESS OWNERS LIKE HER PARENTS

AMRITA AHUJA
Block

TITLE Chief Financial Officer

TENURE 2019 - Present

BACKGROUND Activision Blizzard, Fox Networks, The Walt Disney Company, Morgan Stanley

Have a purpose in your work. Understand the why of your product, its direct impact and how your work serves the broader ecosystem.

As a child in Cleveland, Amrita Ahuja got to witness the American Dream in action. “I grew up at my mom’s daycare center, a child of immigrants who were small business owners. My parents started their business, when interest rates were 18% 42 years ago, and I was 1 year old. I got to see her example as a woman leader with both empathy and edge.”

Amrita discovered a talent for analysis after undergraduate school and went to work for Morgan Stanley. But rather than work on many projects externally, she wanted to see projects through to completion and “build long-term relationships rather than parachuting into the middle of a process.” So, she went to work overseeing new business development and strategic planning for Disney.

Incubating new businesses with Disney saw Amrita traveling the world to find how different communities interact with different attractions and services. She also helped pioneer Disney’s direct-to-consumer entertainment film and TV business, and filled several roles at cutting edge entertainment firms such as Activision Blizzard (including as CFO of Blizzard Entertainment) before joining Square (now Block).

“When Square called, the cause of economic empowerment really resonated with me,” Amrita says. “I saw how connecting the dots for small business owners could’ve helped my parents.”

She joined Square just in time for the company – and the world – to undergo massive changes. “We’re now more than twice the size of when I started,” she says. “We’ve grown in so many ways, including how we showed up for our customers with empathy during the onset of the pandemic. 50% of our businesses disappeared, so we rolled out new products to help keep their doors open. We had subscription billing, provided them with resources and our cash app business started a journey toward exponential growth.”

Amrita believes the legacy she leaves at work is the people she has hired and helped to find new opportunities and ways to advance in their careers.


She and her husband have two boys, 8 and 5 years old. “They’re discovering the world – each day there’s a new revelation.” They also have a Bernedoodle named Izzy.

LARKIN STREET


YOUTH SERVICES




9 out of 10 youth who complete our comprehensive programs exit to stable housing




WHAT WE DO




HOUSING



HEALTH AND WELLNESS




EMPLOYMENT



EDUCATION

for more information, please visit larkinstreetyouth.org



Celebrating leadership in the community

Congratulations to all of the 2022 Bay Area CFO of the Year finalists on their well-deserved recognition. Thank you for your drive, dedication and commitment to the Bay Area community.

JPMorgan Chase is proud to support our region’s best and brightest business community leaders!

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PUBLIC COMPANY, LARGE FINALISTS

Trust your instincts. You already know the answer. When I have gone against my instincts, generally I have been sorry.



ZOOM EMBRACES POST-PANDEMIC STATUS AS A HOUSEHOLD NAME

If any company became a household name during the COVID-19 pandemic, it was Zoom. The online chat platform is almost synonymous with its function, like Xerox and Google. Kelly Steckelberg has been with Zoom for five years, preparing the company for its explosion onto the world stage.

She has overseen incredible growth. "In December 2019, we were averaging 10 million meeting participants a day," says Kelly. "By April 2020, that number jumped to 300 million. This growth required immediate scaling as the company needed to react in terms of capacity, organization, and technology, and took in \$4 billion in revenue. I went from having to explain what Zoom was to being stopped at the grocery store for my t-shirt."

Kelly completed an accelerated five-year joint Master's and accounting program at the University of Texas at Austin before moving to San Francisco. "I worked in public accounting doing both auditing and taxes. Then I worked for PeopleSoft's tax department, and in international accounting in Amsterdam." The move abroad "accelerated both my personal and professional life and sparked my love for travel."

Her journey to Zoom is the result of an early ambition. "Somewhere around my second job, I set the goal of becoming a public company CFO. I focused

on opportunities that would broaden my skill set and some great people really helped." When an attempt to become CFO at Webex was stymied by an acquisition, she moved on to Zoosk.

In six years at Zoosk, Kelly achieved her goal of becoming a CFO, as well as COO and ultimately CEO for two years. "I learned how marketing, engineering, and production all work together, and then the day after I left, the CEO of Zoom, Eric Yuan, reached out. I was really impressed by their tech, and joined up as Zoom's first CFO."

Kelly is a passionate world traveler who went from not having a passport to visiting 65 countries. She takes her family on a big trip every year and is always proud when her nieces and nephews make journeys of their own. She has recently moved back to Texas and has established a scholarship in her mother's honor at her alma mater.

Her love of travel has reinforced her belief in Zoom's mission. "My portable computer, camera, and light let me be flexible and I love the flexibility we are bringing to the world. We keep businesses and families connected and can support people through adoptions. We even gave Zoom away free for grades K-12."

KELLY STECKELBERG
Zoom Video Communications
TITLE Chief Financial Officer
TENURE 2017 - Present
BACKGROUND Zoosk, Cisco, Webex, Epiphany, PeopleSoft, KPMG

Kaiser Permanente is proud to support Larkin Street Youth Services and the Bay Area CFO of the Year Awards.

Congratulations
Kathy Lancaster

2022 Hall of Fame Lifetime
Achievement Award winner
AND ALL THE CFO AWARD FINALISTS





BAY AREA NATIVE PREPARES LOCAL TECH COMPANY FOR LONG-TERM SUCCESS

Ken Miller is a Bay Area local who attended Santa Clara University before working for Ernst & Young. He joined Juniper Networks in 1999 and says, "23 years later I'm still here. I'd been doing fine at E&Y, and then Juniper went public a few weeks after I joined. So, right place, right time."

Ken was inspired to work in finance early on. “In my junior year of high school, I took an accounting class,” he says, “Fun class. We did a big case study like a game with fake bills and cash and invoices. The teacher called accounting the language of business.”

At Juniper, Ken found that expanding his skill set was key to building self-confidence. "In my first seven or so years at Juniper, I was doing accounting and accounting-related work because that was my core competency. Then I switched to financial planning and analysis. Two years after that I realized I was finding success in something that wasn't my training."

As CFO, Ken has led Juniper through challenging times toward a period of growth. "It's about scale right now. We had to turn the business around, and it hasn't been an easy journey. My first four or five years was about transforming the company, but now I'm focused on making my team as efficient and pro-

It's not just the what but the how.

ductive as the business scales and we double down on what's working," he says.

Thanks in part to Ken and his team, Juniper Networks is ideally placed to take advantage of today's market. "Networking is our industry, and it's never been more important to the world. Connectivity has never been more essential. It's a good place to be from an industry perspective. We've done a lot of hard work and we're going to reap some of the benefits."

Ken describes his leadership philosophy during this growth: "To get involved up-front and set the vision and roadmap but stay pretty hands-off and let my team execute. I'm involved in final outcomes and decisions and try to be there for help. I let my strong team prosper, so I can leverage their skills and not get in the way."

Happily married for 25 years, Ken is involved with sports as well as spending time coaching for his sons, ages 20, 18, and 14. "Baseball, a little soccer, and basketball. With baseball, I felt more involved, calling pitches, deciding when to steal or not to steal." Not surprising, considering his leadership role on the job.

KEN MILLER

Juniper Networks

TITLE Executive Vice President,
Chief Financial Officer

TENURE 2016 - present

BACKGROUND Ernst & Young



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PUBLIC COMPANY, SMALL TO MEDIUM WINNER



PRABIR ADARKAR DOORDASH

AN UBER VETERAN BRINGS GIG ECONOMY EXPERTISE TO FOOD DELIVERY AT DOORDASH

PRABIR ADARKAR
DoorDash

TITLE Chief Financial Officer

TENURE 2018 - Present

BACKGROUND Uber, Goldman Sachs

Prabir Adarkar made waves when he left his position as Head of Strategic Finance at Uber to become the Chief Financial Officer at food delivery service DoorDash in 2018. He had been serving as Uber’s de facto CFO before the move, and like several other gig economy startups, DoorDash was not yet profitable. So Prabir had his work cut out for him, starting less than two years before the COVID-19 pandemic dealt a serious blow to the dining industry. But he was never one to back down from a challenge.

In 2000, Prabir received a Bachelor’s in Electrical Engineering from the University of Mumbai, then moved to New York to get his Master’s in Electrical Engineering from Columbia University. In 2008, he received an MBA at the NYU Stern School of Business. He has brought an engineer’s keen eye for detail and pragmatic problem-solving to every position since, as well as the boldness to switch nation, school, and focus in pursuit of the right place to apply his skills.

Prabir led Uber’s Strategic Finance Team and was responsible for their global strategic planning process and setting pricing and incentive strategies in partnership with executive leaders and regional Ops teams. Prior to working for Uber, Prabir was Vice

We’re rooting for restaurants and we’re excited for them to succeed.

President of Technology, Media, and Telecommunications Investment Banking at Goldman Sachs. His duties included advising clients across a broad range of technology sectors and M&A transactions, as well as shareholder activism and capital structure alternatives.

Prabir was able to anticipate consumers’ continued reliance on meal takeout and delivery after cities opened back up in the wake of the pandemic, saying, “Consumer behavior tends to be sticky, so when new habits are formed, those habits persist. And our product has gotten materially better. There are more restaurants on the platform, delivery times are quicker and that’s helped us keep consumers coming back.” Under his fiscal leadership, DoorDash has “become the leader in online convenience and what that speaks to is the extensibility of our platform, the size of our consumer base, and our ability to engage that base.”

PUBLIC COMPANY, SMALL TO MEDIUM FINALISTS

THOUGHTFUL SCALING KEEPS AFFIRM STRONG IN A TOUGH MARKET



MICHAEL LINFORD
Affirm
TITLE Chief Financial Officer
TENURE 2018 - Present
BACKGROUND Hewlett Packard, KKR & Co., McKinsey & Co.

While studying mechanical engineering at the University of Texas, Michael Linford helped design and launch a satellite. “It launched after I left but it had a big influence on me. That’s where I learned the value of teamwork and a multidisciplinary approach to problems. If you take problem-solving and apply it to a really complex set of challenges,” he says, likening that experience to his current position. “At Affirm we are out to do something truly audacious: changing the way people interact with credit. A lot of people would say that’s at least as hard as going into orbit.”

Working on the satellite project wasn’t Michael’s only lucky break. “I consider myself the luckiest person in the world. Rather than follow a career plan, I’ve just tried to create value in any opportunity that pops up.” He was recruited by McKinsey & Co. before learning shareholder value creation at KKR, then working with Meg Whitman at Hewlett Packard.

He considers the move from KKR a major leap of faith in his career, saying, “Really impressive people, really satisfying job, but one step away from operating assets. The decision to leave was really hard. Switching specialties usually involves a step down, but the opportunities are enormous.”

That choice helped bring Michael to Affirm, where he helps shape the company’s goals. “My time in engineering and at KKR helps me try to create a better mission. For us, that’s about improving lives.”

It’s my job to steward other people’s careers. I attend to their progress regardless of where they go – work for me once and you’re working for me the rest of your life.

Michael’s focus on deliberate growth has also prepared Affirm to navigate today’s difficult business landscape. “A lot of companies right now are going through reductions, and we don’t need to because we’ve been thoughtful about scaling for three years.”

Michael is looking forward to Affirm taking its place as a leader in the movement to change credit. “This company is in such a cool space, a special company in a special moment. We’re sitting on a seismic shift as consumers walk away from traditional credit.” He points to recent upheavals as the cause. “COVID accelerated these trends, and consumer preferences are changing very fast. We want to maintain a different approach to risk management. We think our industry will more than triple in 3-5 years.”

Michael owns and finances a brewpub with his brother-in-law. “I’m a tinkerer at heart,” he says. He also devotes a lot of time to supporting the University of Texas.

HEALTHCARE CFO SUPPORTS PRIMARY CARE AS KEY TO HEALTHY PEOPLE



BJORN THALER
One Medical
TITLE Chief Financial Officer
TENURE 2019 - Present
BACKGROUND CVS Health/AETNA, Barclays Capital, Lehman Brothers, Citigroup

I’m Austrian by background and received my law degree in Austria,” says Bjorn Thaler, describing his early journey. “I decided to add an international MBA, jointly between the Universities of Vienna and South Carolina. I started working in investment banking in London for two years, then New York in 2002. Everyone told me investment banking was so hard and I figured I’d try it and find out. I spent the next decade-plus in that field.”

After 11 years, Bjorn decided to move on. “It was time to go from dealing with other people’s money to dealing with house money,” he says. “I went to work for what had been a client of mine, AETNA, doing investments and mergers and acquisitions, then consumer goods and services.” He helped AETNA secure a deal with CVS, and thereafter was asked to run their healthcare division.

From there, the move to One Medical was natural. “I believe primary care is the key to transforming healthcare and keeping people healthy, and One Medical was already working on this. I firmly support changing the way healthcare is performed in this culture. By focusing on primary care, people can lead happier, healthier lives and save on medical costs.”

Bjorn describes One Medical at 14 years old as a “classic teenager” and is dedicated to helping the company grow while preserving what makes it great:

“our product, people, and resources. How we can change and improve over time. Focus on what makes One Medical special.”

In July of 2022, Amazon announced the acquisition of One Medical for \$3.5 billion, an agreement Bjorn helped to facilitate.

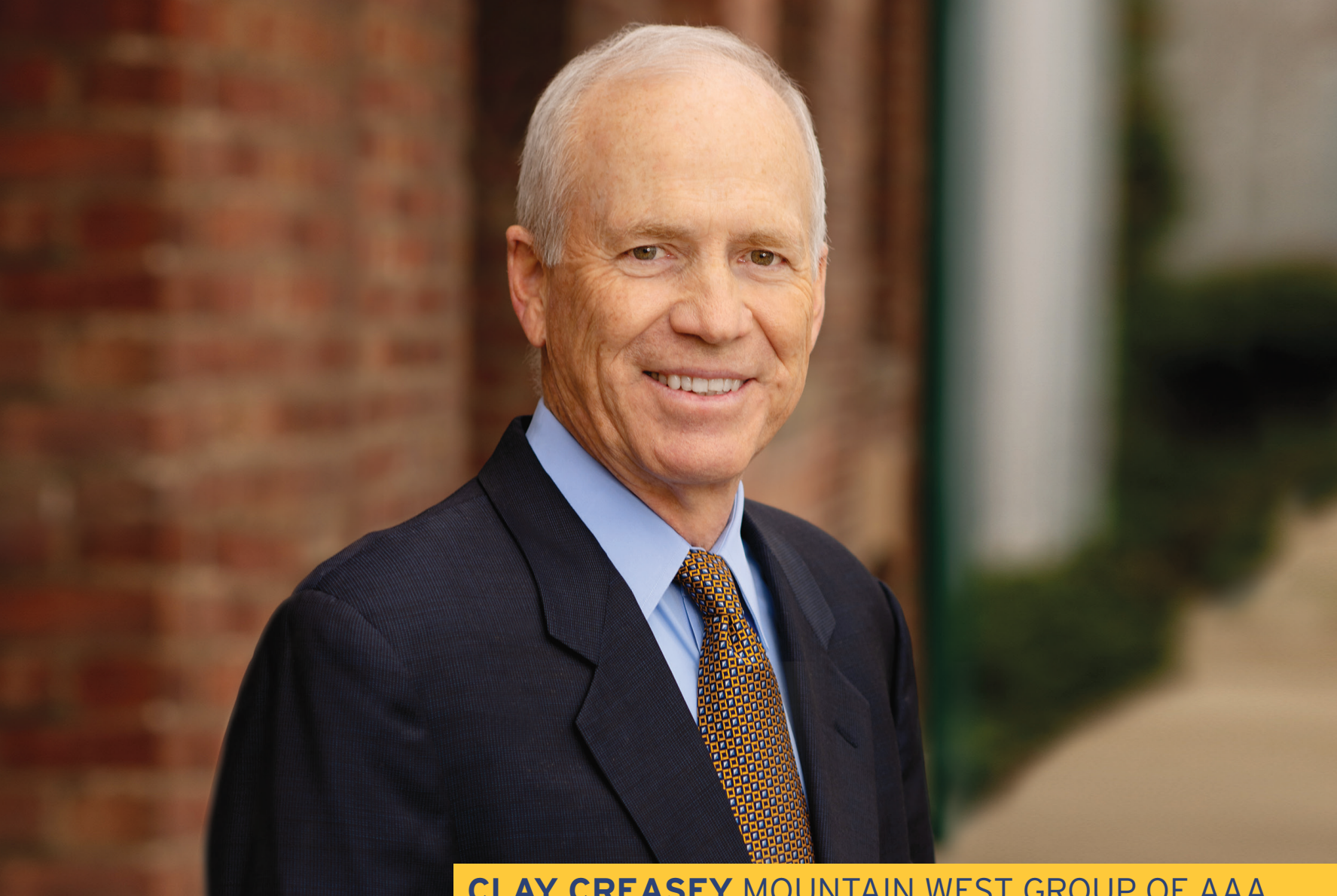
“Over the last 5-10 years, the CFO position has become focused on more than just strategy and long-term goals,” Bjorn says. “Strategy has to show up in the numbers. You’re not just responsible for closing the books but you’re sitting at the table and that’s super exciting.”

As a leader, Bjorn is most proud of working with the same people multiple times in his career, and of seeing his team members find success on their own. “They came back for more because they learned a lot and love working with me. AETNA employees have gone off to become CFOs themselves. That means I’ve done something right.”

Bjorn has been with his partner for over ten years. He enjoys hiking and scuba diving, and is a trained ice diver and rescue diver who lives vicariously through his godchildren. He describes the secret of his success as “investing the extra time. Wouldn’t you want to spend a few extra minutes to avoid minor mistakes?”

You always meet people twice, so do the right thing.

TRANSFORMATION AGENT WINNER



CLAY CREASEY MOUNTAIN WEST GROUP OF AAA

TURNING OUR REGIONAL AAA CLUB INTO A TOP PERFORMER

CLAY CREASEY
AAA, Mountain West Group
TITLE Chief Financial Officer
TENURE 2016 - Present
BACKGROUND Toys“R”Us, Mervyn’s, Lucky Stores, Sunset Bancorp

The role of staff is to give management the courage to make the right decision. - PAUL DRUCKER

Every morning, Clay Creasey’s father would round up Clay and his siblings and drive them to handle tasks across their Napa Valley farm. Clay learned to drive a tractor at 13, which was “fun the first day and then not fun any other days.” The elder Creasey’s advice for solving any problem was “use your own judgment” and “just keep plugging along.” Eventually his children would have the latter saying framed in his den.

Clay attended Stanford, went to work in insurance, and then returned to Stanford for business school. After six years at Crocker Bank, he worked in the treasury department for Lucky’s grocery stores. Clay threw his hat in the ring to replace the retiring Treasurer, but the CFO told him, “you’re absolutely qualified and I’m sure you’d do a fine job, but if I put you in that job you’ll be pigeonholed in treasury. You need accounting experience,” he said, and moved Clay into accounting.

“I realized I had to assimilate,” Clay says. “I got CPA certified, and that plus my MBA and treasury experience helped me become a CFO. So I really benefited when he gave me what I needed instead of what I wanted.”

Clay says he is “very proud of what we’ve accomplished at AAA. It was a sleepy club, but the CEO had

a grand design and six years into a ten year-plan, we’ve largely accomplished the transformation he set out for us.” The Mountain West Group has more than doubled its shareholder equity and risen into the top tier of member growth and satisfaction.

Clay attributes his success in his role to understanding the ways in which “AAA has some retail attributes” and to his focus on treating “mentoring as an absolute critical must and people as the primary piece of your job.” By centering his leadership on what his team members need to advance their career over what the company needs from them, he “reverses the motivation for doing a task, and really inspires people to bring their energy and creativity.”

Though the family farm is no longer in the family, Clay lives in Ojai on a 4.5 acre property where he and his wife are “beating back the jungle in our little slice of heaven.” In 2002, he joined his daughter in a community production of “Guys & Dolls,” and spent five years doing musical theater. He considers it the biggest challenge of his business career. Determined to “keep plugging away at age 73,” he is taking a correspondence course in law.

TRANSFORMATION AGENT FINALISTS



DAVID EAKES

HomeLight

TITLE Chief Financial Officer

TENURE 2017 - Present

BACKGROUND CafePress, Oracle, Sun Microsystems, Deloitte

M&A SPECIALIST HELPS RESHAPE THE RESIDENTIAL LANDSCAPE

Born and raised in Raleigh, NC, David Eakes started college at UNC but switched to NC State due to “the girl that I was dating and some other things. That move set me right -- UNC had classes with 300 people, and I really thrived with smaller classes at NC State.”

Inspired by his businessman uncle, David went into accounting at the school of management, beginning his career with Deloitte & Touche in 1994 where he spent 10 years starting in auditing in North Carolina, corporate finance in London, and finally Mergers & Acquisitions in San Francisco. As Vice President of Finance at CafePress in San Mateo, he worked with Sumant Sridharan (CafePress’s President, now HomeLight’s COO) through the company’s 2012 IPO.

This relationship with Sridharan led to Davis’s position with Homelight. “After a lunch with Sumant, I signed on as consultant for Homelight’s Series B, then moved into a fulltime role in August 2017. I went from the first finance hire at Homelight to driving 3-digit growth year-on-year and leading a team of 30.”

Leadership is the core of David’s strategy as CFO. “I’ve always believed in building a team. You get more out of people if they’re incentivized to do the best job, and we’re all in the same boat,” he says. His strategy at Homelight has been to “find good people, put them in the right places, and empower them

It’s a marathon, not a sprint.

to get things done. We’re scrappy here and everyone gets down in the weeds. We need people who do things rather than tell others what to do.”

David is very excited about Homelight’s potential to help regular people find homes amid the housing crisis. “We provide the tools agents and customers need to compete in this environment. From building a tool to connect consumers and agents, homelight rolled out a product where we buy the home on behalf of the consumer. We also have a trade-in program, and an off-the-shelf customizable financial planning and analysis tool.”

Married for nearly 25 years, David’s wife is a videographer and they share a passion for the music scene, supporting both the Blue Bear School of Music and the SF Rock Project. “Blue Bear got me back into playing drums. We both love the outdoors. I’m a mountain biker and we enjoy hiking and skiing.”



KEITH JENSEN

Fortinet

TITLE Chief Financial Officer

TENURE 2018 - Present

BACKGROUND DataDirect Networks, Sybase, Dorado, PWC

GROWTH AND PROFITABILITY ARE TOP PRIORITY FOR CYBERSECURITY CFO

As CFO of Fortinet, Keith Jensen stays up-to-date on trends in online crime, and is grateful for “the growing awareness around cybersecurity and its importance in society.” He cites the different methods bad actors use, and considers the steps that organizations should take to protect themselves, saying, “Nation-states like China, Russia, and North Korea want to go undiscovered for their cyberattacks. On the other hand you have ransomware, where to get paid they have to be discovered, but are agnostic in terms of country and ideology. What does security look like for government agencies and private industry?”

To answer these questions and provide the best fiscal guidance for his company, Keith has developed a data-centric strategy of parsing information and communicating clearly with company leaders. “It’s vitally important to present information in a way that’s digestible. A good CFO looks for trends, combining different data points to solve a puzzle and pushing that philosophy down to direct reports.” In his role at Fortinet, Keith considers several key questions and urges patience. “What’s the story the data is telling you? What are the metrics you want to look at? And make sure to give the organization time to process the data.”

Keith’s corporate strategy favors balanced growth and profitability, as he says, “It’s either good news or bad news at cybersecurity.” When leading his team, he describes the CFO’s role as “paying attention to providing people the right career opportuni-

I’m very proud of what Fortinet has accomplished over the last four years, and of the leadership position we’ve been given credit for by third parties.

ties for new challenges without overextending them. Give them new challenges where they can learn and be successful. Develop your team to grow within their roles.”

Keith grew up in Sacramento and went to school at Sacramento State. After receiving his business degree he “looked around and realized I don’t want to work on government audits” before supervisors at Coopers & Lybrand sent him to work in the San Jose tech industry, saying, “Don’t worry, you’ll work it out.”

Married with two grown children and one young grandchild, Keith spends a lot of his time at the office. “Not a lot of time-intensive hobbies,” he says. He points to a period tutoring at an inner city early childhood center as pivotal to his development. “It gives you a ton of visibility into the challenges other members of society are facing, working with one student at a time who’s 7-8 years old. It’s depressing when the process ends but very validating at the time.”

NON-PUBLIC COMPANY WINNER



ANDREA ELLIS LIME

BRINGING CONFIDENCE, CREATIVITY, AND INTENTIONALITY FROM WALL STREET TO MICROMOBILITY

ANDREA ELLIS
Lime
TITLE Chief Financial Officer
TENURE 2020 - Present
BACKGROUND Goldman Sachs, Restaurant Brands International, Tim Hortons, Popeyes, BridgeBio Pharma

Micromobility can really transform congestion and the way we live in cities, making them more livable, and it's exciting to be at the early stages of the industry.

Andrea Ellis began her career at Goldman Sachs, moving to New York to work on Wall Street. She joined a rotational team and became the youngest person at Goldman to do market making, at 22, before switching to international trade and equities. The only problem was she started in 2007. “That was interesting timing. I had a front row seat to the fiscal collapse.”

After going to business school in Boston, Andrea returned to Goldman on the investment side, and then became a banker in LA. She was approached by a friend at Burger King and helped them merge with Tim Horton’s and build their finance bench. “It was my first foray into corporate finance.” She would move to Canada to act as CFO for Tim Horton’s before an interest in ops led her to become the general manager for Popeyes, where she was able to “bring an analytical and quantitative lens to the business.”

“I’m definitely someone who loves new challenges agnostic to what the functional area is, which made it so exciting when someone from Lime reached out about the CFO role in 2020,” says Andrea. “I felt the micromobility industry was at an inflection point in May of 2020, with single-passenger open form transportation set to explode. It was my first startup and my first foray into the tech, and I’ve grown from overseeing 35 people to 100.”

Lime had been through a painful down-round and a series of layoffs the month before Andrea joined. When COVID forced the company into extreme cost discipline, the quarter after she joined was their best ever. “Afterwards we raised around \$500 million. Today we’re very intentional in how we build our teams and invest in our business, focused on costs and profitability.” Backed by her CEO, Andrea has focused on investing in positive ROI ventures and growth.

Andrea stays conscious of diversity. “When I joined Goldman I was one of three female traders out of a class of almost 230. I like being able to craft a team that can represent the world around us, so at Lime we’re 70% women, 60% POC. The biggest job I have is building a team that is sustainable and thoughtful. I’ve always viewed being a woman of color as an advantage, knowing I’d stand out in any room, and my perspective would be remembered.”

I have a three-year-old boy who is my heart,” Andrea says. “He is a lot of fun and keeps me busy.” Andrea describes herself as a social homebody who loves hosting friends and family. Her biggest hobby is table scaping: creating elaborate themed dinner settings for parties and events.

NON-PUBLIC COMPANY FINALISTS



JUDD SHER
Hellman & Friedman
TITLE Chief Financial Officer
TENURE 2012 - Present
BACKGROUND Deloitte Tax, Georgetown University Law Center, First Graduate

USING TECHNOLOGY TO FACILITATE GROWTH

Effective communication really is the key to almost everything, whether working with a colleague, mentoring, teaching, or providing feedback.

Judd Sher had been working for Deloitte for twelve years when one of his main clients asked him to interview for their CFO position. “I did not want the role but I had to show interest to a client,” Judd says. “I figured there was no way I’d get it. Thirty interviews later, they offered me the job.” The client was Hellman & Friedman.

Judd grew up in Cape Elizabeth, Maine, attending public school before majoring in business at the University of Maine. “I worked 40 hours a week and tried to play sports at the same time. I’ve always loved to work and believed hard work would pay off. I borrowed money to go to college and then went to law school.”

It just turned out he wasn’t driven to be an attorney. “My third year of law school, I opened my high school yearbook and had no recollection of any ambition to become a successful lawyer.” Luckily, he found it easy and enjoyable to pivot to tax law and received his tax law degree from Georgetown before moving to Deloitte.

Judd had a comprehensive strategy of embracing technology to facilitate growth at H&F. “They wanted me to drive change and technology through the finance department to scale and grow business. Networks are crit-

ically important and you need to see what mousetrap everyone is using. I went to meet other CFOs to find out what tech they were using or thinking of using.”

Judd leverages his passion about “technology and the way it’s developing” to pursue H&F’s goals. “I’m really excited about the possibilities for the future, to see changes in the way we interact with our investors and the efficiencies and how quickly we can do financial reporting, and for investors to get their own info and manipulate data.”

Despite his expertise in tax law and focus on innovation, Judd describes his strongest skill set as “people and mentoring. It’s so rewarding to see someone you’ve helped train and guide become successful.”

As the first person in his family to graduate from college, Judd sits on the board of First Graduate to help other families experience this same game-changing first. Judd maintains his love of sports and is an avid mountain biker. “Last summer I competed in the Leadville 100, the Boston Marathon of Biking. It’s my single greatest athletic accomplishment.” The eldest of his three sons played pit crew. An avid Warriors fan and season tickets holder, Judd also enjoys reading spy novels.



JONATHAN SURRIDGE
Bay Alarm
TITLE Chief Financial Officer
TENURE 2019 - Present
BACKGROUND Lumity, Inc., RealityShares, Motif Investing, Wells Fargo

LOCAL SECURITY FIRM REFOCUSES ON PROFITABLE GROWTH WITH A CFO WHO KEEPS HIS STARS HAPPY

When Thematic Investing offered Jonathan Surridge his first CFO position in 2012, he didn’t have long to prepare. “They asked me on Friday and on Monday I was CFO,” he says. “I called various friends who were CFOs and asked them what I should do. They said, ‘get a good controller.’ The second controller I worked with has now worked with me at three companies! This has taught me one overriding principle: keep your stars happy.”

Jonathan keeps his stars happy by making sure their work keeps their careers moving. “I get personally embarrassed if I’m wasting somebody’s time. I want to develop people and encourage them to get what they want from their job, make sure they’re not just thinking about what they can do for the company but how they can develop as a professional. This is as true for an intern as for my direct reports.”

This attitude has served Jonathan well, especially as he moved to Bay Alarm, “making the transition from venture capital to an established company, going from making forecasts to gaining capital, and working as a white-collar employee in a blue-collar company.”

Jonathan’s strategy for success at Bay Alarm required equal parts ambition and thoughtful planning. “Refining the operations of our business means improving on something that’s been functioning for 75 years. It’s like making balloon animals since every-

I came to a company with 75 years of collective wisdom, and I wanted to hear all of it before I tried to sound smart. I’m still waiting to sound smart.

thing is so tight – squeeze it in one place and it pops up in another.” One of his major achievements was working with the head of sales to launch Bay Alarm’s first new commission plan in 20 years, reorienting the sales approach from a volume-driven model to profitable growth.

Jonathan was born in the Midwest and attended college on the East Coast. “At the end of college, I looked around and realized people go into law school, medical school, consulting, or investment banking. I came from a long line of lawyers and decided I didn’t want to be one.”

He has four children, “a lovely wife, and four cats. If I’m not at the office, I’m at home working on my yard because it’s a disaster.” He also counts his sneezes. “At the present moment I have sneezed 12,168 times since August 8 2002 at 5 PM. An average of 1.7 times per day.”

EMERGING COMPANY WINNER



THOMAS EGAN DIVVY HOMES

SOLVING REAL-WORLD PROBLEMS, LIKE MAKING IT EASIER TO BUY A HOME

THOMAS EGAN
Divvy Homes
TITLE Chief Financial Officer
TENURE 2018
BACKGROUND The F-Suite, Fitch Ratings, Barclays Capital, Merrill Lynch, Latham & Watkins



Tom Egan is a “double eagle,” having received a BA in Philosophy & Political Science from Boston College in 1998 and a JD from Boston College Law School in 2001. When the worldwide financial crisis hit in 2007, Tom was working at Leman Brothers. “My son had been born and I had a daughter on the way,” he says. “I kept my job, kept my head down, kept my health insurance.”

But Tom always had a greater goal in mind. “I went into banking with the idea of getting out of banking.” When a friend moved over to London to reboot a high-yield business, Tom joined him, staying in the UK from 2011 to 2017, and his stay only reinforced the idea that he wasn’t meant to be a banker. “Big banks are inefficient and not set up to innovate, and fintech is going to eat their lunch at some point. I wanted to add value to a company without starting from zero.”

In 2018, he did just that by joining Divvy Homes, taking over their capital markets function as their first executive hire. “We buy a lot of homes, up from 30 to 50 a month to 300 to 500. That makes us a significant consumer of capital. I had to build out the capital infrastructure, establish new relationships and upsides in our credit facility, and bring in someone to build out our capital markets. A little over a year into my tenure, we took the accounting and law functions in-house.”

The best part about working at Divvy is working with really smart people who are passionate about homeownership.

Tom is proud of his time at Divvy Homes and the utility they provide for home-buyers. “Every single person I’ve talked to said ‘I wish this existed when I was trying to buy a house,’” Tom explains. “This is a real product that needs to exist and is solving a real-world problem.”

To live up to that ideal, he makes sure to motivate his employees with a focus on their career and happiness, recalling, “My boss at Leman Brothers called me into his office and said, ‘I would much rather keep you in the building and have you working for someone else than have you leave to do something you want to do.’”

Tom lives in Marin with his two teen children. He appreciates how remote work has given him more time to spend with them, saying, “I love seeing my family for dinner.”

EMERGING COMPANY FINALISTS



COURT SHOWERMAN
Quora
TITLE Chief Financial Officer
TENURE 2014 - Present
BACKGROUND Dropcam, RingCentral, DemandTec, KPMG

NOW AT HIS FOURTH STARTUP, CFO HAS ALWAYS PUT PEOPLE FIRST

“People are motivated by two things: joy of success or fear of failure,” says Court Showerman. “I’m motivated by the fear of failure. I always think I’m about to get fired right before a promotion.”

That sense of keeping ahead of disaster has certainly served Court well in his career. It has helped him surround himself with an amazing team and defend their ability to work unhindered. “As a leader, one of your biggest jobs is just to block for your team so they can focus on their tasks. Give them the guidance, structure, and strategy they need to execute. Hire good people and let them do good work.”

Court was born in Michigan but raised in Silicon Valley. He attended the University of Santa Clara for his BA. “Growing up with tech at my doorstep, I always knew I was going to be in finance and business. Born with a briefcase in my hand,” he says.

With a lifetime goal of becoming a CFO, Court began as a CPA before moving into startups. “This is my fourth startup,” he says of Quora. And he has taken his attitude about letting his team do its best work with him the whole time. “I always go back to the people. I get to work with and for really good people, and I love ensuring they can continue to prosper in their careers. I hope to have played some small part in that.”

As a mentor, he focuses on accurate feedback. “The simple act of providing constructive, useful criti-

It’s not just the what but the how.

cism is really undervalued and under-delivered. The speed at which you can do that is vital. Don’t get back to people 18 months later but address challenges right away. It’s not easy; it takes time and has to be balanced with celebrating successes.”

Looking into the future, Court is most excited about new frontiers in computing and what they mean for finance, predicting, “AI in accounting is going to be a game-changer and we’re just scratching the surface. Today we’re manually touching almost every transaction that goes through the company. That percentage is going to decrease dramatically until teams only handle the outliers. It’s really going to be a time-saver for accounting departments.”

Court lives with his wife and two daughters, ages 8 and 6. “My family takes up a lot of my time. I love lots of sports and support all the Bay Area teams. I stay active, exercise, and hike.” That fear of failure seems to have kept him pretty motivated.



JOE PAGANO
Sendbird
TITLE Chief Financial Officer
TENURE 2018 - Present
BACKGROUND DataTorrent, Ocean Wave Technologies, Ecologic Brands, Autodesk

WORKING FROM THE BOTTOM UP TO CONNECT THE DIGITAL WORLD

If you’re given the opportunity to be a leader, lead. When you succeed, thank everyone involved. But when you fail, you own it. That’s how you build trust. - Joe’s Dad

In his junior year at the University of Arizona, Joe Pagano did not yet know what he wanted to do. “I knew I was analytical,” he says, “So I did what any lazy college student might do and looked at my grades to see where I was putting my effort. Then I added a third data point about guaranteeing job security in a good or bad economy. Everything pointed to accounting and business, so I ended up a CPA.”

Working as a controller for Heidelberg West in his late twenties, Joe was disappointed when the excellent CFO he had worked under left after the 1989 Loma Prieta earthquake, and even more disappointed in his replacement. When that person was let go, Joe threw his own hat in the ring. “The CEO smiled and said they’d been waiting for me to ask,” he says. “Then they flew me out to Germany and I had to sit in a giant boardroom with a single light on me for 20 minutes before they all came in and interrogated me. That experience taught me to be cool under pressure.”

When offered his position at Sendbird, Joe was impressed not just with the investors but the company and its leadership. “The CEO is extremely humble and interested in learning from anybody and everybody. I loved his approach and his mentality, and the quality of the people. The company was at an earlier stage than I expected but punching above their weight.”

Sendbird’s mission is to build connections in a digital world by providing an integrated chat, voice, and video platform. As a leader, Joe believes in service and loves “the multiplying factor of working from the bottom up. I’ve been successfully helping people move the rock forward by answering questions. I’m fortunate as an empty nester who had nothing to do during COVID except help people excel in their role.”

Joe’s two children are 22 and 24 years old, with the youngest just having graduated and the elder two years into his career. “It’s fun to see the giddiness that comes from liftoff, watching them evolve,” Joe says. He reads a book a week and is an avid cyclist, sharing this love with his son. “We go cycling together every other weekend, and just chat as peers. I’ve always used sports to make friends, even with my firstborn.”

NON-PROFIT ORGANIZATION WINNER



JENNIFER WILDS HABITAT FOR HUMANITY

EMBRACING A TWO-PART MISSION TO HELP CALIFORNIANS FIND HOUSING

JENNIFER WILDS
Habitat for Humanity, Greater San Francisco

TITLE Chief Financial Officer

TENURE 2016 - Present

BACKGROUND Hotel Tonight, CNET Networks, Capital One

As they navigate the ongoing housing crisis, nonprofits need leaders who can see the big picture and create actionable strategies that put people in homes. As CFO for Habitat for Humanity, Jennifer Wilds believes in a two-part mission:

“We’re trying to both build affordable home owning opportunities and preserve them,” she explains. “That means both building homes or advocating for increased access to affordable housing, and making sure people have access to financing.”

“Preserving people’s existing homes has become more important in recent years. The cost to build in California has been astronomical, so we’re staving off gentrification, especially in traditional low-income neighborhoods. We go in and repair houses in select ‘focus neighborhoods.’” Jennifer has built a strategy “unique within the affordable housing world. We believe in the transformative properties of homeownership. Though challenging in the Bay Area, it transforms generations and helps families build a legacy.”

Jennifer was born in Georgia and raised in Delaware. Her father was a chemist and her mother a teacher. She studied engineering at Harvard but “doing summers at DuPont, I realized I did not want to work in a lab. I joined a little company called Capital One in 1995 when nobody had heard of it. The ways they approached marketing and analysis appealed to me.”

Before Habitat for Humanity, Jennifer’s career included building an online comparison shopping engine for CNet. She also worked for GameSpot and

Your best job has to be one where you love your function.

CNet’s other consumer brands, and at a startup that was eventually purchased by Airbnb. Overall, her career has focused on “marketing and finance, which is what I really love. But I always wanted to live in the Bay Area and came here in 1998 for business school at Stanford.”

Asked what part of her job is most satisfying – besides the overall mission of the organization – Jennifer says, “I really like developing other people. When I’m able to mentor someone and see them flourish it makes me very happy. I want your work at Habitat to be a defining experience, where you can be mission-oriented but get something back.” She appreciates reminders of her successful relationships. “I’m trying to declutter my home and I found some thank-you notes from folks.”

The home Jennifer is decluttering is in Alameda, where she lives with her husband and daughters, 10 and 13 years old. She is a dedicated runner and during the wildfires of the early pandemic, ran a virtual half-marathon on her treadmill. Jennifer describes herself as a “reader, and huge music and movie buff. I haven’t found a genre where I don’t like anything.”

NON-PROFIT ORGANIZATION FINALISTS



PATRICK SCHMALZ

Meals On Wheels, San Francisco

TITLE Chief Financial Officer

TENURE 2016 - Present

BACKGROUND Goodwill Industries of the Greater East Bay, St. Matthew's Episcopal Day School, YMCA of SF, CSX Transportation

ENSURING NOBODY MISSES A MEAL DURING THE PANDEMIC

"I was pretty good at math when I was young, so I decided to study engineering in college," says Patrick Schmalz. His favorite classes combined "the mathematical logic to play 'Battleship' with the time and motion studies of the dad in the movie 'Cheaper by the Dozen.'" Ultimately, he realized engineering wouldn't make a compelling career, and felt drawn to finance.

He soon found a position that needed both his engineering expertise and fiscal acumen. "My big break was CSX Transportation, a big East Coast transportation company. They were looking for someone who could work with both technology and people to combine the advantages of both – and that sounded like me. The fact the company was primarily a railroad, which meant I got to ride on trains, was an added bonus!"

Patrick had the chance to develop an employee education program in cooperation with a local community college. "I coordinated the logistics, and in what seems somewhat ahead of its time for the 1980s, we taped every class – on state-of-the-art VCRs!"

With the program helping 200 student-employees per semester, Patrick found a passion for using his administrative skills in service to others. Preferring the Bay Area over Jacksonville, Florida, where CSX would have sent him next, he drew a path in 2016 to Meals on Wheels San Francisco.

At MOWSF, he has facilitated \$8 million in tax credit financing to help build the \$42 million Sangiacomo Fly-

It is not the critic who counts nor the man who points out where the doer could have done better. The credit belongs to the man in the arena who spends himself in a worthy cause.

- adapted from Theodore Roosevelt

nn kitchen and distribution center. And Pat is proud of helping to transition the agency into an agile COVID response. "No MOWSF client has missed a single meal or social work service during the pandemic."

Following these considerable accomplishments, Patrick is looking forward to the new opportunities that technology will create for MOWSF, saying, "I still get excited about the constantly evolving ways to combine the skills of people and technology to help support our mission."

Patrick is married with four grown sons. "I am extremely grateful for and proud of my family, including my large group of in-laws," he says.



SABRI OZUN

The Olympic Club

TITLE Chief Financial Officer

TENURE 2018 - Present

BACKGROUND Water Districts - Fresno & Merced Counties, Fine Arts Museums of SF, United Way of Southern Nevada, Citibank

LIFETIME ATHLETE IMPROVES FACILITIES AND AMENITIES FOR OLYMPIC CLUB MEMBERS

Listen. Don't speak too much. Understand what others are saying and communicate it back. Take a patient approach when responding to communications rather than a knee-jerk reaction.

Born and raised until the age of sixteen in Izmir, Turkey, Sabri Ozun moved to San Diego. He excelled in swimming from his early teens and was offered a full scholarship to swim for the University of Nevada Las Vegas, earning two undergrad degrees in economics and finance. "My goal was to become a college professor – my dad was a college professor and mom was an English teacher."

Instead, he took a job at Citibank when they opened a tech center in Las Vegas. "I was their first management associate trainee and worked in CFO positions." Eventually, he transitioned into nonprofit work, first for the United Way of Southern Nevada.

"With two babies, my wife and I moved to where education was at the top of people's minds. I was a CFO at the San Francisco Fine Arts museums, then spent some time with water districts in the Central Valley."

Ultimately, The Olympic Club proved a great match for Sabri. "The Olympic Club is a very athletics-oriented club, so it suited me well as a former athlete, let me merge my two different lives as a finance person. I love

what I'm doing even though frequently I work long hours."

In his first year at The Olympic Club, Sabri was asked to determine the best timing and finances for a number of capital projects, such as renovating properties to provide more amenities. "I came out with very robust planning models for the board and senior management, including how and when to implement projects, looking forward 20 years. I was also able to provide insight into the processes within each of those projects." Six of the 12 projects he analyzed are still ongoing.

Today, Sabri is working to increase member satisfaction and use of club facilities. "We have three big global events coming up that we're hosting, and a lot of our efforts are dedicated to making our amenities as great as possible," he says.

Married for 17 years, Sabri and his wife have a daughter, 12, and a son, 10. He spends time walking, hiking, and exercising with his family, and has not lost his love of swimming. "I'm on a Master's team and no matter how tired I am, it makes me feel great about myself."



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