

**The Who's Who of the
2021 Virtual Finance Leaders' Conference
3 – 5 March 2021**



SEAN BAKER, Inclusiveness Consultant | Talent Attraction and Acquisition (TA²), EY

Sean has been with EY for over 10 years. Prior to joining EY, he received a Master of Accounting from the University of North Carolina at Chapel Hill and is a licensed CPA.

Sean has a passion for recruiting and diversity and it has led him to his current role as an Inclusiveness Consultant. Sean now consults with recruiters, colleges, and clients across the country on how to attract and support the best and most diverse mix of talent. He leads efforts around disabilities inclusion and has counseled and mentored many students with disabilities on their future career path. He lives in Michigan with his family and is a licensed foster parent.



AARON BEAM, Former CFO of HealthSouth Corporation
Keynote Address

Mr. Beam was a co-founder of Healthsouth and the company's first CFO. From 1984 to 1996 he helped grow Healthsouth into a Fortune 500 company. However, in 1996 he took part in an accounting fraud at the company that resulted in one of the largest corporate frauds in the history of the United States. In 2003 he pled guilty to the crime and was sent to federal prison.

Mr. Beam is also an author. His first book "Healthsouth: The Wagon to Disaster" was published in 2009. His second book was published in 2015 "Ethics Playbook: Winning Ethically in Business." He is a graduate of Louisiana State University. Today he lives in Loxley, Alabama with his wife of 47 years, Phyllis.



LISA BEAUDOIN, CMA, CSCA, CAE, Senior Director of Business Development, Institute of Management Accountants (IMA)

As Senior Director of Business Development for the Institute of Management Accountants (IMA®), Lisa Beaudoin works with companies and educational institutions around the world to create awareness of the benefits of membership in a professional association, as well as the benefits of earning the Certified Management Accountant (CMA®) certification.

Prior to joining IMA, she was the Accounting Department Chair at Cleary University in Ann Arbor, Michigan. Earlier in her career, Lisa held various accounting and financial management positions at Ford Motor Company, Ford Credit, and IBM Corporation.

She holds a BBA from the University of Michigan, an MBA from the University of San Diego, and recently earned an Executive Certificate in Nonprofit Management from Northwestern University's Kellogg School of Management



JILL CASTILLA, President and Chief Executive Officer, Citizens Bank of Edmond

Jill Castilla joined Citizens Bank of Edmond in 2009, transforming the struggling institution into one of the most innovative community banks in the nation. Most recently, Castilla partnered with Mark Cuban and Teslar to create the award-winning PPP.BANK website to support small businesses during the COVID pandemic, and she filed a patent for the creation of a full-service electronic banking facility.

In 2020, Castilla was named as one of the 25 Most Powerful Women in Banking by American Banker. Castilla was also recognized as Banking Dive's Executive of the Year, Cornerstone Advisor's Banker of the Year, Journal Record's Newsmaker of the Year in Banking and Finance, and Oklahoma City's 50 Most Powerful Women.

Castilla holds a master's degree in economics from the University of Oklahoma and a bachelor's degree in finance from Hawaii Pacific University. She is a graduate of the University of Wisconsin's Graduate School of Banking and The Wharton School.



ANDREW COHEN, Award Winning Distinguished Lecturer, Education Entrepreneur & Creator of Future Traders

Andrew Cohen is an Academic Entrepreneur & Award Winning Distinguished Senior Lecturer of Finance at Old Dominion University: Creator of "Future Traders" educational trading simulation; Developer and investment strategist of the "Systematic Alpha" Model at Validea Capital; Former top Wall Street Trader and Market Maker, Public Speaker, Entsminger Fellow, and Bloomberg Expert.

He began his career at Goldman, Sachs Training Program establishing a strong foundation for success. He utilized Future Traders along with his Wall Street trading and investing experience to elevate ODU's trading room lab into the top echelon of Bloomberg's Trading Rooms. He has an MBA in Finance from New York University Stern School of Business. He received FMA's 2019 Innovative Teacher of the Year Award in 2019.



CHRIS FILS, Complex Manager, Raymond James & Associates

Chris, who's responsible for all aspects of branch profitability, works to support recruiting efforts, such as through home office visits and by enhancing the transition process of advisors joining Raymond James.

Prior to joining Raymond James in 2018, he worked at Morgan Stanley as the manager of their Los Gatos, California, branch. As a former regional investment specialist for Merrill Lynch in New York City and Southern Connecticut, he drove revenue and assets under management for the entire region. Before relocating to New York, Chris worked as a successful financial advisor at Merrill Lynch in St. Petersburg, Florida.

A graduate of the University of South Florida, Chris holds a Bachelor of Science in finance and earned his MBA from Saint Leo University. He has also completed the rigorous requirements to earn his CERTIFIED FINANCIAL PLANNER™ certification, and is an Accredited Asset Management SpecialistSM professional, equipping him with specialized knowledge in financial planning.



TING CHEUNG HO, ESG Program Manager, S & P Global

Ting Cheung Ho is an ESG Program Manager within the Corporate Responsibility function at S&P Global. He is responsible for the development and delivery of corporate sustainability projects, with a particular focus on Environmental, Social and Governance (ESG) disclosure and performance, both within the enterprise and across the external value chain.

Ting is a strong proponent of ESG mainstreaming in the financial sector to power the markets for good by driving greater engagement with long-term strategic issues.

Prior to joining S&P Global, Ting has served in different responsibilities in public and multilateral sectors including the UK Government at the Department for Business, Energy and Industrial Strategy (BEIS), as well as the United Nations Environment Programme (UNEP). Ting's background is in Environmental Policy and Regulation where he obtained his Master's degree from the London School of Economics and Political Science (LSE).



LOREAL R. JILES, Director of Research – Digital Technology & Finance Transformation, IMA

Loreal Jiles is Director of Research – Digital Technology & Finance Transformation for IMA. In this role, Loreal works hands-on with leading and emerging digital tools, engages with leaders in the management accounting profession, and delivers research and resources that enable the upskilling of accounting, finance, and business professionals. Loreal also contributes to the strengthening of the global academic offering of collegiate accounting programs through collaborative research projects, knowledge sharing, and leadership of the IMA Higher Education Endorsement Program through IMA's Committee on Academic Relations.

Prior to joining IMA, Loreal worked in the energy industry for nearly 15 years across a host of roles covering accounting, digital technology, financial reporting, change management, auditing and planning & performance management, including leading a Robotic Process Automation implementation in a finance organization.

Loreal holds a B.S. in accounting from Southern University in Baton Rouge, La. and MBA from Tulane University.



CRAIG W. JOHNSON, CFA, CMT, Piper Sandler

Craig Johnson is a managing director and Chief Market Technician of Piper Sandler's technical research group. Johnson joined Piper Sandler in 1995 as an analyst in the firm's private client research department. He offers frequent technical commentary on the broader market and individual stocks.

Johnson earned his B.S. degree with an emphasis in finance and marketing and his M.B.A. from Drake University. Johnson holds the Chartered Financial Analyst and Chartered Market Technician designations and is an active member of the Twin Cities Society of Securities Analysts and co-chapter chair of the Minnesota Chapter Market Technician Association. He is also the past President of the Market Technicians Association and leads its Board of Directors.



BEVON JOSEPH, Greenwood Project Co-Founder

Originally from Trinidad & Tobago, Bevon moved to the United States after high school to further his education. He is a graduate of DePaul University.

Bevon's career has been exclusively in the trading industry, specifically in technology. He's worked at financial institutions such as JPMorgan, Morgan Stanley, UBS, Chicago Trading Company, PEAK6 Investments, and Achievement Asset Management. Bevon also worked on the trading floors of the NYSE, NYMEX, and AMEX.



ROCHELLE MARCH, Manager, ESG Innovation and Analytics at Trucost

Rochelle March is Manager, ESG Innovation and Analytics at Trucost, part of S&P Global where she leads product development of innovative financial tools and analysis for companies and financial institutions. Joining Trucost in 2017, Rochelle specializes in building and scaling ESG products. She is experienced at data visualization, risk assessment and applying machine learning to ESG analysis.

Rochelle has worked in sustainability consulting, conducted cancer research at Weill Cornell Medical College and founded a graphic design company. She holds an MBA in Sustainability and MS in Environmental Policy from Bard College and a BA with honors from New York University in Individualized Study: Landscape Architecture.



LAURA MATTIA, PH.D., MBA, CFP®

Owner of a Sarasota based Fee-Only Financial Planning and Investment firm and with over thirty years of finance experience, Laura is a comprehensive financial planner, educator, speaker and author. She is a member of NAPFA and a fiduciary advocate.

A former corporate financial executive and thought-leader in the field, Dr. Mattia's career journey was a circuitous one. After earning a B.S. in psychology with the intention of pursuing a career helping people, she went on to obtain an MBA in accounting and finance, later accepting a position in the corporate world.

Dr. Mattia teaches future CFP® professionals at Texas Tech University and recently spent several years creating a new CFP® registered program at the University of South Florida.



TUCK NORTHROP, Investment Banking Instructor, Wall Street Prep

Most recently Tuck spent four years with Teach for America as a corps member in Bridgeport, CT. Prior to that, Tuck served as an investment banking analyst in the TMT sector with Guggenheim Securities in New York and Revolution Partners in Boston. Tuck holds a Bachelor of Arts in economics and philosophy from Boston College and is finishing his MA of Science in Education from John Hopkins University.



AMY PERKINS, President insideARM and the iA Institute

Amy joined the iA institute and insideARM in 2017. Previously, she was Senior Vice President, Head of Strategy and Analytics, Collections & Recovery for Citizens Financial Group.

Prior to Citizens Amy spent eight years with Bank of America in a variety of roles including SVP Card Recovery & Outsourcing; SVP Consumer Business Support Executive; SVP Consumer Collections & Recovery, Business Enablement and Fulfillment; and SVP Consumer Banking Services, Risk Management and Quality Control.



PATRICK SELLS, Head of Bank Solutions, NYDIG

Patrick Sells, an award-winning entrepreneur recognized for digital innovation in banking, is on a mission to transform financial services through the fusion of Bitcoin and banking. A deeply held belief of Patrick's is that the two should be symbiotic in order to create maximum financial security for all. As the Head of NYDIG's Bank Solutions business, Patrick will build upon the momentum from NYDIG's efforts to bring the needed technological infrastructure for banks to be able to offer Bitcoin products and services such as custody, rewards programs and lending opportunities.

Prior to joining NYDIG, Patrick served as Chief Innovation Officer at Quontic Bank, where he evolved the firm into a leading adaptive digital bank in the U.S. through a focus on technology and innovation. Prior to Quontic, he built and ran several technology, data and digital marketing companies, and has advised banks and fintech companies on regulatory compliance.

In 2020, Patrick was recognized as American Banker's "Digital Banker of the Year" and one of Independent Community Bankers of America's "40 under 40 Emerging Community Bank Leaders."



SAM STOVALL, CFP® Chief Investment Strategist as Chief Investment Strategist

Sam Stovall serves as analyst, publisher, and communicator of CFRA's outlooks for the economy, market, and sectors. He is the author of The Seven Rules of Wall Street and writes weekly "Sector Watch" and "Investment Policy" reports on CFRA's MarketScope Advisor platform.

Prior to joining CFRA, Sam was Managing Director and Chief Investment Strategist at S&P Global for more than 27 years and served as Editor-in-Chief at Argus Research, an independent investment research firm in New York City.

He received an M.B.A. in Finance from New York University and a B.A. in History/Education from Muhlenberg College, in Allentown, Pa. Sam is also a Certified Financial Planner.



DEREK WHITE, Vice President, Global Financial Services, Google Cloud

Derek White is the Vice President of Global Financial Services at Google Cloud. He is responsible for setting the go-to-market strategy and partnering with banks, insurance companies and other financial services entities to transform and help redefine their core businesses into state-of-the-art digital operations, while also creating new solutions, products, and capabilities.

Prior to Google Cloud, he served as the chief digital officer for U.S. Bank, and earlier in his career, Derek was the global head of client solutions for BBVA. Derek also held several leadership roles at Barclays, including chief design and digital officer. He was also the technology ambassador for London, actively promoting the UK market as a fintech capital.

He earned a master's of business administration degree from the University of Pennsylvania -- The Wharton School, and holds a bachelor's of arts degree from Utah State University.



DAVID YERMACK, Professor of Finance and Business Transformation, Stern School of Business, New York University

David Yermack is the Albert Fingerhut Professor of Finance and Business Transformation and Chairman of the Finance Department at New York University's Stern School of Business, where he has been a member of the faculty since 1994.

He is also an Adjunct Professor of Law at the NYU School of Law, Director of the NYU Pollack Center for Law and Business, and is affiliated with the European Corporate Governance Institute and the National Bureau of Economic Research.

Professor Yermack was awarded AB (1985), MBA (1991), JD (1991), AM (1993) and PhD (1994) degrees, all from Harvard University. At NYU he teaches joint Law-MBA courses on Corporate Restructuring and Blockchains and Digital Currencies.