



# Accounting & Technology Conference

Operating at the Intersection of Accounting and Technology™



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**Date:** Tuesday, July 24, 2012  
**Time:** 8:00 am - 4:00 pm (EST)  
**Venue:** Penn State Great Valley, Malvern  
**Attendee Costs:** \$199 per attendee  
**CPE Credits:** 1- Accounting & Auditing, 7-Other

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## WHO SHOULD ATTEND

- CFOs
- VP - Finance
- Internal Audit Directors
- Controllers & Audit Managers
- Finance Directors & Managers
- Risk Management professionals
- Consultants
- Internal Controls Managers
- Information Security Managers
- Accountants & Staff/Senior Auditors
- Project Managers & SOX Managers

## TOPICS

- Finance Transformation at Vanguard - Managing The Shift From Operational Excellence To Strategic Partner
- Social Media Panel – Business Issues, Legal Issues, and Risk Management Topics and Issues for the CFO and the CIO
- Business Analytics for Decision Making: The CFO's Role
- ERP Migration
- Cloud Computing
- Cloud and ERP Technology Panel Discussion on Legal Issues
- Accounting Standards Update

## PROGRAM CHAIR



### **Brandon S. Weinstock, CPA**

With 30-plus years of experience as a management consultant, CPA, financial and operations manager, and entrepreneur, Brandon brings a wide perspective and deep value to the table for his clients. He has managed national-level consulting operations for large CPA and consulting firms, and held C-level private industry positions in business operations and accounting.

## FEATURED SPEAKERS



### **Richard D. Carpenter**

Chief Financial Officer  
The Vanguard Group, Inc.



Richard D. Carpenter was elected as the Chief Financial Officer for The Vanguard Group, Inc. in 2008. Prior to this role, Dick was a Principal and Corporate Controller responsible for Corporate Financial Services for Vanguard since 1998. He joined Vanguard in 1985 and previously was an Audit Manager for Price Waterhouse. He graduated from Lehigh University.



### **Gary Cokins, CPIM**

Principal, Global Business Advisors  
SAS Institute, Inc.



Gary Cokins (Cornell University BS IE/OR, 1971; Northwestern University Kellogg MBA 1974) is an internationally recognized expert, speaker, and author in advanced cost management and enterprise performance and risk management systems. He is a Principal Consultant involved with analytics-based enterprise performance management solutions with SAS, a global leader in business intelligence and analytics software. He began his career in industry with a Fortune 100 company in CFO and operations roles. He then worked 15 years in consulting with Deloitte, KPMG, and EDS. His two most recent books are "Performance Management: Finding the Missing Pieces to Close the Intelligence Gap" and "Performance Management: Integrating Strategy Execution, Methodologies, Risk, and Analytics"



### **Ryan J. Udell**

Partner & Co-chair, Business and Corporate Group  
White & Williams



Ryan Udell concentrates his practice on mergers and acquisitions, intellectual property counseling and transactions, and general corporate issues, with special emphasis on technology focused industries, such as software, clean energy, pharmaceuticals and biotechnology, and those that support such industries. Employing scalability, Ryan offers creative and efficient solutions – be they simple or complex – tailored to suit his clients' particular needs. Whether it's an emerging growth firm or a multinational company, Ryan's clients appreciate his willingness to leverage his extensive business and professional network in helping them achieve their business goals, from formation to capital raising to procurement and operations to cross-border transactions.

## FEATURED SPEAKERS



**Steven Alter**  
VP & CIO  
Arcadia University



Executive Leader in Information Technology with demonstrated capabilities in providing both strategic and tactical direction to a diverse team of information technology professionals while shaping decision making in various functional areas; Higher Education, Finance, and Human Resources. Experienced, Executive IT Leader and Program Management in the following areas: establishing a Program Management Organization, system modernization, managing multi-million dollar enterprise initiatives, and mentoring constituents. Demonstrated executive leadership in all phases of information systems strategy and tactical implementation, higher education learning tools in an international setting, financial management, and organizational change. Positions of increasing responsibility have been achieved through out-of-the-box thinking, development of strong teams, strategic planning, disciplined program management techniques coupled with analytical, written and oral communications skills. Proven track record in relationship building, leading cross-functional teams, and willingness to take appropriate risks.



**Pam Townsend**  
CIO  
Triumph Group, Inc.



Pam joined Triumph Group, Inc. in 2007 as the Chief Information Officer. Triumph Group, Inc. is a global leader in manufacturing and overhauling aerospace structures, systems and components, headquartered in Berwyn, Pennsylvania. Pam started her career at Burroughs Corporation (later Unisys) in Software Engineering. Earlier in her career Pam was the IT Director at Kulicke & Soffa responsible for the network, data center, help desk, as well as applications. Prior to K&S, Pam joined West Pharmaceutical Services as the North America IT Director with responsibility for IT at all U.S. locations. Pam earned her B.S. Accounting from West Chester University and her M.B.A. Information Systems from Widener University.



**Peter W. Laberee**  
Owner  
Laberee Law PC



Peter W. Laberee is the founder of LABEREE LAW PC, a corporate finance and technology boutique law firm. After more than 25 years in large firms, Peter formed LABEREE LAW PC to serve the needs of business, finance and technology enterprises. His clients include businesses in the software, hardware, supply chain, security, telecommunications, finance, and branded products industries, among others. Peter advises on corporate acquisitions, mergers, financings and other business transactions and prepares companies for due diligence examinations, investments and legal audits. His clients include venture capital firms and individual investors in early- and mid-stage equity transactions and many portfolio companies with venture backing. He is the founding general counsel of the Cloud Security Alliance NY Metro Chapter. Peter Laberee is a frequent speaker at industry gatherings, continuing legal education seminars and venture capital conferences, including at recent cloud computing and security conferences.

## FEATURED SPEAKERS



**Alec Elmore**  
President  
OpenGate Consulting.



Alec Elmore is the Founder and President of OpenGate Consulting, a regional Business and IT Consulting firm. For 20 years, Alec has been working with companies to select, implement and optimize their enterprise applications, including, ERP, CRM, SCM, and Business Intelligence. His experience spans many industries including Consumer Products, Industrial Manufacturing, Professional Services and Non-Profit. Alec founded OpenGate in 2003 with goal of helping companies to leverage technology to take them to the next level. Alec works hands on with executive teams to lead them through change initiatives whose core is typically enterprise technology. Prior to OpenGate, Alec was VP Product Strategy & Director of Professional Services, Prescient Applied Intelligence, a Supply Chain Planning & Forecasting software vendor. Alec was also an consultant with Arthur Andersen's Business Consulting practice in the Philadelphia and Lancaster offices.



**Martin Gephart**  
VP & CIO  
Hayes, Inc.



Marty has been with Hayes since May 2010 with the responsibility of managing all of Hayes' information technology needs, such as website design, social networking initiatives, IT infrastructure, and security projects. Marty has 19 years of information technology experience and previously led IT operations, web development, and business intelligence teams and initiatives for multimillion-dollar companies, including Nutrisystem, Inc., Radian Guaranty, Inc., and Southwest Airlines. Marty is skilled at developing requests for proposals (RFPs), negotiating complex contracts, and tracking ongoing vendor performance. Marty earned his BS degree in Computer Science from Pennsylvania State University.



**CV Sudarshan**  
CEO  
Gorilla Expense



CV is responsible for all aspects of strategy, finance and accounting at Gorilla Expense which offers an innovative SaaS based T&E expense management solution to companies of all sizes. CV has worked in the technology industry for more than 15 years with extensive knowledge of cloud computing, ERP systems and mobile-based technology. His experience also includes roles in customer management and product development. CV's passion lies is growing businesses, offering creative solutions to customers and optimizing components of corporate finance with minimal disruption.



**Sharon Kane**  
Partner  
PricewaterhouseCoopers, LLP



Sharon, a Stamford Connecticut based audit partner with PwC, leads the US Computers and Networking subsector of PwC's technology practice and is a subject matter expert on cloud computing. Her background includes a strong knowledge of the technology products and services industries and meeting the needs of multi-national public companies. She has also worked with a number of clients on successful IPO transactions. Sharon is also a member of the Board of Directors of the Connecticut Venture Group, a professional organization committed to connecting leading Venture Investment Professionals with high-growth emerging companies in Connecticut.



**Michael Coleman**  
Partner  
PricewaterhouseCoopers, LLP



Mike is an audit partner in the NY Metro Technology assurance practice and has been with PwC for over twenty years. During this time, he has served some of the largest audit clients in the Firm's New York Metro practice, and has performed several carve-out audits. Prior to his current client assignments, Mike spent six years in the Accounting Consulting Services group within the National Office of PwC, specializing in revenue recognition. Mike has extensive experience with all facets of revenue recognition across all industries, with a particular emphasis on software revenue recognition, IT services and other high technology revenue recognition matters.

**PROGRAM DESCRIPTION & OBJECTIVES****TIME****Finance Transformation at Vanguard - Managing The Shift From Operational Excellence To Strategic Partner****08:10 AM – 09:00 AM****Richard D. Carpenter** - CFO - Vanguard

- Managing The Shift From Operational Excellence To Strategic Partner

**Social Media Panel – Business Issues, Legal Issues, and Risk Management Topics and Issues for the CFO and the CIO****09:00 AM – 09:50 AM****Peter Laberee** - Owner - Laberee Law PC**Ryan Udell** - Partner & Co-Chair, Business & Corporate Group - White & Williams**Pam Townsend** - CIO - Triumph Group, Inc.**Martin Gephert** - CIO - Hayes**Steven Alter** - VP & CIO - Arcadia University

With the explosion of Social Media (Facebook, LinkedIn, Twitter and more) today, used by employees for personal and business communications, by customers, by competitors, by your marketing department, there are many business and legal risks and concerns. Legal matters, such as slander, defamation, libel, trade secrets, legal liability are risk issues to be managed. The issue of employers demanding employees' Facebook passwords has even been taken up in Congress with talk of legislation. Our Distinguished Panel of Experts will discuss and enlighten you on these and other matters to provide a practical understanding of these and other related topics:

- Financial Resources, Legal Issues & Risk Management
- Information Technology & Business Processes
- Technology Impact on Legal Issues
- Human Resources Issues

**Break****09:50 AM - 10:10 AM****Business Analytics for Decision Making: The CFO's Role****10:10 AM – 11:50 AM****Gary Cokins** - Principal - Global Business Advisors, SAS Institute, Inc.

Organizations embracing analytics gain insights for better and more timely decision making. Business intelligence (BI) reporting consumes stored data that first must be cleansed and integrated from disparate source systems and then is transformed into information. Business analytics (BA) produces new information. Enterprise performance management (EPM) then leverages and deploys the information. EPM requires BI as a foundation. Predictive analytics are important because organizations are shifting from managing by control and reacting to after-the-fact data toward managing with anticipatory planning so they can be proactive and make adjustments before problems arise. The CFO may well lead the charge to create a culture for analytics. Gary Cokins will lead this discussion and answer these questions:

- What Forces Have Caused Interest In Business Analytics And Statistics?
- What Is The Difference Between Business Analytics And Business Intelligence?
- Why Business Analytics, With Emphasis On Predictive Analytics And Pro-Active Decision Making, Is Becoming A Competitive Advantage Differentiator And An Enabler For Trade-Off Analysis.
- How Applying Business Analytics Increases The Power Of Enterprise Performance Management Methodologies (E.G., Demand Forecasting, Strategy Execution With KPI Scorecards, Customer Profitability Analysis, And Risk Management.)

## PROGRAM DESCRIPTION & OBJECTIVES

## TIME

**Lunch** 11:50 AM – 12:30 PM

**ERP Migration** 12:30 AM – 01:20 PM

**Alec Elmore** - President - Opengate Consulting

As the CFO of a growing company, you are constantly watching to make sure all functions in the business are able to keep up with the growth and have the right tools to handle the increase in volume and complexity. One of these functions and tool, is your ERP system. It is very difficult to know if your existing system that has gotten you this far is not going to take you to the next level. And if the answer is to move on to a more robust solution, which is the right one and how do you migrate while mitigating the risk of a long, unsuccessful implementation. Alec Elmore will lead this discussion.

- Mid-Sized Vs. Large Sized ERP – What Are The Differences?
- How Do You Know It's Time To Make The Move?
- What To Focus On When Selecting The Right System?
- How To Drive The Successful Implementation
- Pitfalls To Avoid

**Cloud Computing** 01:20 PM – 02:10 PM

**Sharon Kane** - Partner - PricewaterhouseCoopers LLC

Cloud computing can help businesses meet demands for greater agility as it is changing the ability for companies to deliver solutions at the new speed of business. Cloud computing solutions have the potential to accelerate innovation and time-to-market in addition to reducing IT costs. This session will provide an overview of cloud computing, explore both the advantages and risks it presents, and talk about how those risks can be mitigated. Sharon Kane will lead this presentation.

- What Is Cloud Computing, Exactly?
- What Are the Costs And Benefits?
- What Are the Risks, And How Can You Mitigate Them?

**Break** 02:10 PM– 02:20 PM

**Cloud and ERP Technology Panel Discussion on Legal Issues** 02:20 PM – 03:10 PM

**Ryan Udell** - Partner & Co-Chair, Business & Corporate Group - White & Williams

**Peter Laberee** - Owner - Laberee Law PC

**Alec Elmore** - President - Opengate Consulting

**Sharon Kane** - Partner - PricewaterhouseCoopers LLC

**CV Sudarshan** - CEO - Gorilla Expense

Whether your IT platform is an internally-managed ERP system, or you are leveraging Cloud Computing, the CFO should be aware of the business and legal risks and issues and how to manage them. The CFO is often consulted to analyze cost/benefits and review contracts. Our distinguished Panel of Experts will discuss these issues and answer your questions on:

- Security
- Intellectual Property
- Contracting
- Service Level Agreements
- Migration from Internal Systems to The Cloud

## PROGRAM DESCRIPTION & OBJECTIVES

TIME

### Accounting Standards Update

03:10 PM – 04:00 PM

**Mike Coleman** - Partner - PricewaterhouseCoopers LLC

- Highlights of New and Proposed Accounting Standards
- Status of U.S. GAAP and IFRS Convergence – Status and Issues

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