



**Women's Accounting Leadership Series
Pace University – Aniello Bianco Room
October 27, 2017**

- 8:30 a.m. – 9:00 a.m. Check-in, networking, and continental breakfast
- 9:00 a.m. – 9:05 a.m. Welcome and introductions
- 9:05 a.m. – 10:00 a.m. **“Quick Bytes of Insight”** (1.0 CPE)
Sandra Richtermeyer, Ph.D., CMA, CPA, dean, Manning School of Business, University of Massachusetts Lowell, former IMA Global Chair
A primer for the day! In this session, participants will have an opportunity to consider several issues affecting career outcomes for women in accounting and finance. Sandy will share insights from recent studies and lead the group in a discussion to inspire attendees and provide a foundation for the sessions to follow.
- 10:00 a.m. – 10:50 a.m. **“Controllership Trends”** (1.0 CPE)
Ashley Gibson, advisory manager, Deloitte
Beth Kaplan, managing director, Deloitte Center for Controllership™
Two leaders from Deloitte's Center for Controllership™ share their knowledge and insights about current and emerging trends surrounding the controllership function.
- 10:50 a.m. – 11:10 a.m. Mid-morning break with refreshments, networking
- 11:10 a.m. – 12:00 p.m. **“Sharing Pearls of Wisdom”** (1.0 CPE)
Sandra Richtermeyer, Ph.D., CMA, CPA, dean, Manning School of Business, University of Massachusetts Lowell, former IMA Global Chair
Sandy will facilitate a discussion with three senior financial leaders. Panelists will share their insights, experiences, and advice on challenges faced by women throughout their careers.
- Panelists:
- *Gloria Lio, managing director, BNY Mellon*
 - *Audre Lukosevicius, senior manager, Mazars USA, LLP*
 - *Kathleen McDonald, director of accounting, WW Systems/Cross Brand and Pan-Asia Geographies, IBM*
- 12:00 p.m. – 12:30 p.m. Break for Buffet Lunch
- 12:30 p.m. – 1:25 p.m. Lunch Presentation and Panel Discussion
- “Lessons from Trailblazing Women”** (1.0 CPE)
In this interactive discussion with Joann Lublin, author of “Earning It” and Management News Editor for the Wall Street Journal, hear about how more than 50 executive women broke the corporate glass ceiling. The session will provide an opportunity for attendees to ask questions of the author.
Facilitated by *Leslie Seidman, executive director, Center for Excellence in Financial Reporting, Lubin School of Business, Pace University.*
- 1:25 p.m. – 1:30 p.m. Wrap Up





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Sandra Richtermeyer, Ph.D., CMA, CPA is Dean of the Manning School of Business at the University of Massachusetts Lowell. She works actively with a variety of professional organizations and is a frequent speaker on professional development, governance, internal control, technology enablement, and performance measurement. Her teaching and research interests are in the areas of corporate governance, accounting information systems, and nonprofit and governmental accounting. She has authored many articles in academic and practitioner publications. Her research publications have featured many topics including technology enablement, enterprise systems, nonprofit accounting, and professional issues for accountants.

In addition to her academic background, she worked as a CPA (Certified Public Accountant) for many years in Denver, Colo., with a practice focus on compliance, assurance, and systems implementation. Prior to joining the University of Massachusetts Lowell, she was Professor of Accountancy and Associate Dean of the Williams College of Business at Xavier University. Prior to that, she was on the faculty at the University of Wyoming for several years, where she also completed her B.S. degree. She is proud to be a fourth generation Wyomingite, as well as a "Triple Buff" as she received her M.S., MBA, and Ph.D. from the University of Colorado.

Richtermeyer has held many leadership roles in a variety of organizations over the past 20 years. She is an active board member in a variety of organizations and regularly consults with and provides training for boards on governance best practices and leadership challenges. In addition, she coaches CEOs with an emphasis on improving communications between board members, the CEO, and senior management.

She represents IMA® (Institute of Management Accountants) on the Committee on Sponsoring Organizations of the Treadway Commission (COSO). She also currently serves on IMA's Diversity and Thought Leadership Pipeline Committee. She was IMA Global Chair from 2010-2011 and also has more than 20 years of service in local, regional, national, and global IMA roles. She is currently on the board of directors of the Ohio Society of CPAs, President of the American Accounting Association (AAA) Accounting Program Leaders Group, President of Beta Alpha Psi International, and a member of the U.S. Comptroller General's Green Book Advisory Council.

Richtermeyer has also served on many technical advisory boards for organizations such as Microsoft, Oracle, and PeopleSoft. She is the 2013-2014 Ohio Accounting Educator of the Year and the 2011 American Women's Society of CPAs Educator of the Year.

One of the areas she is most passionate about is women's leadership development, and over the past 10 years she has enjoyed working with various women's groups, giving presentations, and most importantly, listening, learning, and encouraging change and growth, both in the U.S. and abroad.



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Leslie F. Seidman is the Executive Director of the Center for Excellence in Financial Reporting at the Lubin School of Business at Pace University. Ms. Seidman is also a Director of Moody's Corporation, where she is Chairman of the Audit Committee and a member of the Governance & Compensation committees. She is also a Public Governor of the Financial Industry Regulatory Authority (FINRA), where she is Chairman of the Audit Committee and a member of the Regulatory Policy and Governance Committees. She is the immediate past Chairman of the Financial Accounting Standards Board (FASB), where she also served as a member of the Board from 2003-2013.

As FASB Chairman, Ms. Seidman collaborated with the Securities and Exchange Commission, the PCAOB, and other regulators to improve financial reporting in the U.S. capital markets. She helped launch the FASB's Private Company Council, to address concerns about the cost and complexity of accounting for small businesses. Ms. Seidman guided the FASB's joint agenda with the International Accounting Standards Board to converge U.S. and international financial reporting standards. During her tenure, the FASB issued standards and proposals on complex topics such as accounting for stock compensation, business combinations, disclosure effectiveness, off-balance sheet financing, fair value, revenue recognition, leasing, insurance, and financial instruments.

Previously, Ms. Seidman was an auditor with Arthur Young & Co., a Vice President of Accounting Policy with J.P. Morgan & Co., and a member of the FASB staff, serving first as an Industry Fellow, and later as the Assistant Director of Technical Activities. Immediately prior to joining the FASB, Ms. Seidman founded and managed a financial reporting consulting firm, serving corporations, accounting firms, and law firms.

A recognized expert in accounting, Ms. Seidman was the recipient of the 2015 Distinguished Service Award from IMA[®] (Institute of Management Accountants), for launching the innovative Women's Accounting Leadership program. She was named CPA of the Year by the American Woman's Society of CPAs (2013), ranked among the Top 10 Most Influential People in Accounting by *Accounting Today* from 2010 to 2012, and was named to the NACD Directorship 100 for Governance (2011). Ms. Seidman authored the first three editions of *Financial Instruments: A Comprehensive Guide to Accounting and Reporting* (currently in its 15th edition from Wolters Kluwer).

Ms. Seidman is a member of IMA, Financial Executives International, and the National Association of Corporate Directors.

Ms. Seidman, a CPA (inactive), earned an M.S. degree in accounting from New York University Stern School of Business and a B.A. degree in English from Colgate University.



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Ashley B. Gibson, CMA, CPA, is an Advisory Manager from the Houston, Texas office of Deloitte & Touche LLP, specifically in the Financial Risk, Transactions, & Restructuring practice. Ashley focuses on Controllershship Services, providing solutions on financial integrity and Digital Controllershship™ by leveraging various key enablers that result in improved and strategic decision-making as well as better visibility into talent, processes, systems, and governance. She provides guidance, advice, and recommendations to accounting, finance, and/or the Controllershship functions to become more proficient, effective, and insightful.

Ashley graduated from Southern Illinois University with a Bachelor of Science in Accountancy (Magna Cum Laude) and a Master of Accountancy with a concentration in Auditing & Accounting Information Systems. She also received her M.B.A. from Texas A&M University. She is a Certified Management Accountant as well as a Certified Public Accountant.

Ashley's involvement within IMA® (Institute of Management Accountants) dates back to when she was a student member in 2007. To date, Ashley has served IMA in various officer positions, including a Governor for the Stuart Cameron McLeod Society (SCMS) and former Chair of the Young Professional Advisory Committee. In addition to receiving two scholarships within IMA and SCMS, she was a 2015 recipient of the Young Professional of the Year Award.



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Beth Kaplan is a Managing Director in Deloitte & Touche LLP's national Finance Transformation Advisory practice. She is currently the Managing Director for the Center for ControllershTM, which provides Chief Accounting Officers (CAOs), Controllers, and their teams an opportunity to collaborate and obtain direct access to resources and research meant to help build world-class controllership capabilities.

She has more than 30 years relevant experience, including working with a private equity firm to support a recent acquisition and help start up a finance department including a shared service center; working with a private equity portfolio company as they worked through a recent acquisition. This included putting governance around the close process, improvement in overall process for procure to pay, and a detailed assessment of their order to cash process to shore up risks and overall accounting issues; and working with a large technology company to help them assess the business case for a shared service model.

Beth holds a Bachelor of Science in Business - Accounting from California State University - East Bay.



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Gloria Lio is a Managing Director in the Client Service Delivery division at The Bank of New York Mellon responsible for Global Securities Service Delivery. In her current position, Global Securities Service Delivery provides a comprehensive range of custody specific services on behalf of Investment Services, comprising of Trade Capture, Settlements, Income, and Tax and Corporate Events. In addition, Gloria is responsible for leading and coordinating Performance Excellence initiatives across CSD Shared Services.

Prior to joining CSD in February 2016, Gloria was the Global Head of the Custody Business Unit in Securities Operations and Americas Regional Head of Securities Operations for Goldman Sachs. Gloria joined Goldman Sachs in 1996 and held various roles within Securities Operations in the US and Asia and was named Managing Director in 2011.

Gloria attended Pace University where she earned a BBA in Finance.



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Audre Lukosevicius has been providing entrepreneurial, tax, and payroll services to closely held businesses and startup companies for more than 25 years in a variety of industries including real estate, music publishing, and sports and entertainment. She also provides tax services to high net worth individuals, both domestically and abroad. She is a Certified QuickBooks ProAdvisor and is currently serving on the Board of Directors of the Lithuanian National Foundation. She has served 2 terms on the Board of Directors of the Lithuanian American Community, Inc. and was the Principal of the New York Maironis Lithuanian Cultural Education School for 14 years. In addition, Audre is a regular instructor at various in-house seminars and coordinates the Mazars

USA Book Club within the firm.

Audre had a double major and received a BBA in Public Accounting and in Accounting Information Systems from Pace University. She also received an MBA in Taxation from St. John's University.

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Sports
Entertainment
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Startups
Investor Advisory Services

SERVICE SPECIALTIES

Public Accounting
Tax Preparation & Planning Services
Payroll

LICENSES & CERTIFICATIONS

Certified Public Accountant, New York
Certified QuickBooks ProAdvisor

MEMBERSHIPS

Member of the American Institute of
Certified Public Accountants
Member of the New York State Society
of Certified Public Accountants
Member of the National Association of
Female Executives



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Kathleen McDonald is currently the IBM Accounting Director covering Pan-Asia, as well as the IBM WW Systems brand. She has been with IBM for more than 15 years in both technical accounting and reporting roles. She spent three years in Tokyo as the Chief Accountant of IBM Japan with end-to-end country accounting responsibilities. During her time in Japan, she was an Officer of Financial Executives International (FEI) - Japan Chapter. Kathleen also spent three years as Director of Accounting/Managing Director of IBM International Group and subsidiaries in the Netherlands. After six years abroad, Kathleen and her family returned to the U.S. this past July.

Before joining IBM in 2002, Kathleen spent more than six years with Arthur Andersen LLP in their audit and assurance group in Boston, New York City, and Stamford. She earned her Certified Public Accountancy certification in Massachusetts. She graduated from Providence College with a BA in Accountancy in 1995. Kathleen, her husband Tim, and their three children currently live in Ridgefield, CT.

Kathleen is passionate about women's leadership and development. She was one of the founding members of IBM's Women in Finance organization and has continued to contribute to the organization both at home and abroad.



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Joann S. Lublin is management news editor for The Wall Street Journal and works with reporters in the U.S. and abroad. She frequently appears at conferences to discuss leadership, executive pay and corporate governance. She created The Journal's first career advice column in 1993. She shared its Pulitzer Prize in 2003 for stories about corporate scandals. She earned a bachelor's degree in journalism with honors from Northwestern University and a master's degree in communications from Stanford University. She lives in Ridgewood, N.J.



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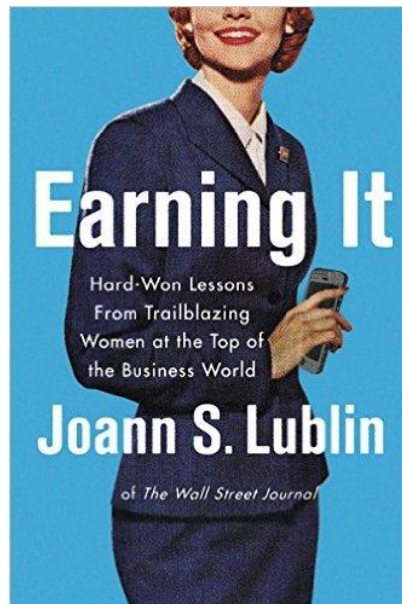


“Earning It: Hard-Won Lessons from Trailblazing Women at the Top of the Business World”

Published October 2016 by HarperCollins

By Joann S. Lublin

More than 50 trailblazing executive women who broke the corporate glass ceiling offer inspiring and surprising insights and lessons in this essential, in-the-trenches career guide from Joann S. Lublin, a Pulitzer-prize winning journalist and management news editor for The Wall Street Journal.



Among the first female reporters at The Wall Street Journal, Joann S. Lublin faced a number of uphill battles in her career. She became deputy bureau chief of The Journal’s important London bureau, its first run by women. Now, she and dozens of other women who successfully navigated the corporate battlefield share valuable leadership lessons.

Lublin combines her fascinating story with tales from more than 50 women who reached the highest rungs of the corporate ladder—most of whom became chief executives—in industries as diverse as retailing, manufacturing, finance, high technology, publishing, advertising, automobiles, and pharmaceuticals. Leaders like Carly Fiorina, former CEO of Hewlett-Packard, as well as Mary Barra, CEO of General Motors, and Brenda Barnes, former CEO of Sara Lee, were the first women to run their huge employer. *Earning It* reveals obstacles such women faced as they fought to make their mark, choices they made, and battles they won—and lost.

Lublin chronicles the major milestones and dilemmas of the work world unique to women, providing candid advice and practical inspiration for women of all ages and at all stages of their career. The extraordinary women we meet in the pages of *Earning It* and the hard-won lessons they share provide a compelling career compass that will help all women reach their highest potential—without losing a meaningful personal life.