

AptConnect 2021

All eyes on finance: accelerating outcomes in the new world



AptCONNECT 2021 EVENT GUIDE

Contents

A note from our CEO	3
Thank you to our sponsors	4
The Product Sessions	5
Agenda - 4th November	6-9
Agenda - 5th November	10-13
Meet the guest speakers	14-15
Meet the Aptitude speakers	15-17



A note from our **CEO**

Dear Aptitude Community,

It's an exciting time for finance. The challenges of 2020 have accelerated modernization efforts throughout 2021, pushed cloud adoption to new heights and demonstrated just how essential automation, analytics, and agility are – and the critical role finance has to play in this space. With more budget dollars flowing to the office of finance, all eyes will be on the CFO and team to ensure value creation. We are committed to supporting finance in this effort.

While I am disappointed we could not gather together in person this year, we are excited to bring you a virtual event agenda that offers compelling client and partner sessions, as well as our live-streamed mainstage update on Aptitude company and product developments.

A massive thank you to our sponsors including Platinum Sponsor KPMG, Platinum Technology Sponsor, AWS, Gold Sponsor, CFGI and Silver Sponsor, PwC.

I look forward to networking with as many of you as possible during the event. Please don't hesitate to reach out to myself and my entire Senior Leadership Team via the platform networking. Thank you again for attending and I hope you enjoy AptConnect 2021!

Sincerely,

Jeremy Suddards, CEO, Aptitude Software

Thank you to our SPONSORS

Aptitude Software has been creating finance solutions for over 20 years, helping the largest and most complex organizations increase financial control, efficiency, and automation while driving smart compliance and streamlined reporting.

The growth and success of Aptitude over this period has been supported by the deep relationships we have with you, our loyal partner network. It is your support which has helped power our solutions, guide us into new markets, and deliver major global projects.

We remain committed to your success and value your commitment to Aptitude Software. Thank you for making AptConnect 2021 a memorable experience for all attendees.

Sincerely,

The Aptitude
Partnerships Team









Head to the Exhibit Hall where you can meet with us and our sponsors in our virtual booths.

As well as chatting at the booths you will also find videos, downloads and can even arrange a private meeting. Be sure to check the Aptitude stand and our Aptitude Innovation Center stand where our teams will be ready and waiting to answer any questions, orientate you or just have a chat! And remember - the more booths you visit the more points you earn, and points mean prizes.

The Aptitude PRODUCT SESSIONS

Lucinda Faucher, Head of Product, will moderate this session as we follow a 'day in the life' of various finance team members. Over the course of the presentation, the Global Product Owners will illustrate the role of Aptitude solutions in empowering finance teams and supporting organizations on their finance transformation journeys.



Chris Roberts, Global Product Owner, will select two finance personas and demonstrate the impact that AAH has on their daily roles. Chris will illustrate how exploiting the Accounting Hub's data management capabilities can reduce complexity and increase efficiency. Chris will also show recently released improvements to the Hub's manual journal processes which will give finance teams more time to spend on higher business value tasks.



Jack Barlow, Global Product Owner, will take you on a journey illustrating the lives of a finance team over-burdened with manual processes, facing an IFRS 17 compliance requirement, and preparing for an ambitious expansion into multiple regions. Jack will demonstrate how using Aptitude's Insurance Solution can not only solve the immediate regulatory challenge but also achieve significant operational efficiencies, business agility, and valuable business insights to support future growth and expansion.



Alexis Faulkner, Global Product Owner, will demonstrate how a technical and finance business user can perform a new, highly complex calculation. The calculation is not a functional capability of any existing system and the data required is siloed across multiple data sources. Alexis will demonstrate how, by using Aptitude Calculate, technical users can easily bring together the needed reference, transactional, and analytical data to perform complex calculations and how finance business users can be empowered to drive business agility.



Gene Voskov, Global Product Owner, will present user personas from an organization that operates a subscription-based business model. The organization has just acquired a company that holds complex lease agreements. Gene will demonstrate how AREV easily overcomes the challenge of merging two revenue teams together and how integrating contract data from Aptitude RevStream and the Aptitude Lease Accounting Engine can drive smart compliance.



Alexis Faulkner, Global Product Owner, will look at two user personas within a multientity organization with a high volume of leases. Due to a change in market conditions, the organization has had a massive surge in the need for contract modifications and extensions. Alexis will demonstrate how the Aptitude Lease Accounting Engine not only addresses the need for IFRS 16/ASC 842 compliance but also addresses the challenges associated with multiple entities and multiple data sources and how the new ALAE user interface empowers business users to perform tasks such as contract modifications faster and smarter.

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AGENDA AptConnect 2021

THURSDAY NOVEMBER

> 7 11.00 - 11.30 a.m. 11.30 - 12 p.m. 12.00 - 12.30 p.m 92





11.00 a.m. 11.00 a.m. - 12 p.m. 12.00 - 12.45 p.m.

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SESSION



EVENT OPENS



EXPLORE THE EVENT



PANEL DISCUSSION:

All eyes on finance: accelerating outcomes in the new world

SYNOPSIS

When you first enter the AptConnect event platform, you will be greeted by a short welcome announcement from Jeremy Suddards, Aptitude Software CEO.

Once the platform is open, take some time to familiarize yourself with the options. If you visit the Aptitude stand in the Expo you will find some information on how to make the most of the event.

CFOs are in a unique position to lead organizations out of the uncertainty of the last 18 months and into a more digital, automated future. In this new world, opportunities are identified and acted upon in real time and companies can quickly adapt to market changes in a world that has never been less predictable. In this panel session, Finance leaders talk about how they are driving transformational change, prioritizing limited time and investments, and ensuring their companies are well positioned to succeed.

SPEAKERS

James Clatworthy, IFRS 17 Data & Systems Lead, Aviva Group Plc Nancy Moore, Senior Finance Leader, OneAmerica Kristina Reid, Partner – Performance Improvement, EY Julie Girard, Head of Product Innovation and Strategy, Aptitude Software Christophe Kasolowsky, EVP, Product Innovation and Strategy,

Aptitude Software (Moderator)

12.45 - 1.00 p.m **NETWORKING BREAK**

LIVE KEYNOTE:



CEO Remarks: All eyes on now



LIVE KEYNOTE:

Pioneering where finance and technology meet



LIVE KEYNOTE:

Putting users at the heart of product design



LIVE KEYNOTE:

Aptitude products in action



PLATINUM SPONSOR PRESENTATION: KPMG CFO Hero

As 2021 draws to an end, Aptitude CEO, Jeremy Suddards, will be discussing why all eyes are on finance to act now and take advantage of a perfect storm of opportunity. Jeremy will reflect on the year that has passed and why he feels there is a ready platform for change in the finance function – and where Aptitude will be focusing to help its community succeed and grow.

We are delighted to formally introduce Christophe Kasolowsky, Aptitude's recent appointment as EVP, Product and Innovation. In his session, Christophe will be looking at the changing world of the CFO – both how technology has evolved, and how the CFO remit has expanded. He'll also present how Aptitude is evolving its product vision and strategy to align with future requirements.

With a background in designing market leading user experiences for the retail industry, Anna Singer, Aptitude's Head of User Experience, presents why UX is so important for a rising workforce that is digitally native. Anna will also cover Aptitude's strategic vision for the evolution of the UX and UI within the Aptitude product portfolio.

Lucinda Faucher, Head of Product for Aptitude Software hosts a session with the product owners as they look at typical days in the life of finance professionals and the challenges and opportunities they face. Each of the product owners will demonstrate how Aptitude products are simplifying the lives of our users, optimizing resources, and enhancing the results delivered.

At AptConnect 2019, we launched a vision video called The CFO Hero featuring a CFO who always stayed one think ahead of the competition by utilizing technology to predict outcomes and guickly adjust forecasts. In this presentation, KPMG will present how the use cases in this video are becoming a reality with Aptitude, KPMG Signals, and KPMG Intelligent Forecasting.

Digital Transformation & Cloud Leader at AWS discusses the latest trends in cloud and what finance

leaders should be thinking about as they consider investments in the new few years.

Jeremy Suddards, Chief Executive Officer, Aptitude Software

Christophe Kasolowsky, EVP, Product Innovation & Strategy, Aptitude Software

Anna Singer, Head of UX, Aptitude Software

Lucinda Faucher, Head of Product, Aptitude Software Chris Roberts, AAH, Aptitude Software Jack Barlow, AICE, Aptitude Software Alexis Faulkner, ALAE, and AC Aptitude Software Gene Voskov, AREV, Aptitude Software

David Fourie, Partner, Finance Transformation, KPMG Matt Kelley, Principal Solution Consultant, Aptitude Software

NETWORKING BREAK

3.30 - 4 p.m.

1.00- 1.15 p.m.

1.15 - 1.35 p.m

l.35 - 1.45 p.m.

1.45 - 3.00 p.m.

3.00 - 3.30 p.m.

4.00 - 4.30 p.m.



PLATINUM TECHNOLOGY SPONSOR PRESENTATION: Cloud innovation in Finance with AWS

There is no longer a need to make the case for cloud in finance. The value of the cloud is clear and has been embraced by CFOs. However, new opportunities for innovation and automation using the cloud are coming and finance leaders should make sure they are taking advantage. In this session Charith Mendis,

Charith Mendis, Digital Transformation and Cloud Leader, AWS

AGENDA AptConnect 2021

THURSDAY NOVEMBER

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12.30 - 1.15 p.m. 1.15 - 1.30 p.m. 1.30 - 2.00 p.m.

> 2.00 - 2.15 p.m. 2.15 - 3.00 p.m. 3.00 - 3.45 p.m.

SESSION

T. Mobile CLIENT CASE STUDY: T-MOBILE

When regulations collide: why T-Mobile selected Aptitude for lease accounting and the value of integrated finance solutions



BETTER, FASTER, SMARTER:

What's next for insurers post-compliance

SYNOPSIS

Any new finance or accounting regulation poses resource and systems challenges for organizations. And for some organizations, the potential intertwining of these regulations adds an additional layer of complexity. During this session, Lora Tarabeih, Director of Asset and Lease Accounting at T-Mobile, discusses T-Mobile's rigorous lease accounting solution evaluation and explains why they chose Aptitude from the 16 vendors they assessed while Alan Berkley, Senior Finance Specialist at Aptitude Software discusses common cases where organizations must solve for intertwining finance and compliance issues.

In recent years, Insurers have shouldered the burden of regulatory compliance (IFRS 17 and LDTI), economic uncertainty, and increasing customer demands. Now, armed with richer, more granular data and more efficient business processes, Insurers have the opportunity to work faster and smarter – and they will need to in order to keep pace with new, tech-first entrants to the market. From prevention-as-a-service, to climate change mitigation, to an anticipated explosion of connected devices, this session will look at what's coming in the insurance industry and how companies can accelerate positive outcomes in tomorrow's world.

SPEAKERS

Lora Tarabeih. Director of Accounting - Asset and Lease Accounting T-Mobile Alan Berkley, Senior Finance Specialist, Aptitude Software

Brian Heale, Senior Presales Consultant, Aptitude Software Sidhartha (Sid) Dash, Research Director, Chartis Research

5.15 - 5.30 p.m.

4.30 - 5.15 p.m.

NETWORKING BREAK

5.30 - 6.00 p.m.

REVENUE MANAGEMENT:

CFGI Using holistic revenue management to drive growth

Q&A SESSION WITH INTERNATIONAL DATA

The future of the finance function

Whether your organization is looking to grow via M&A, a traditional or SPAC-driven IPO, or organically through a product or regional expansion, holistic revenue recognition, automation, and management can play a role in successful growth. In this session, we'll get perspectives from Benjamin Martin, Managing Director, CFGI, David Lopez, Senior Manager, CFGI, and Mark Aubin, Senior VP, Solution Consulting at Aptitude Software on how to use revenue management to meet your growth goals and achieve your ambitions.

Aptitude Software is excited to launch a research paper jointly developed with International Data Corporation (IDC), a leading global provider of information technology, market intelligence, and advisory services. The paper is based on IDC's extensive research on the CFO's evolving mission and vision for the future role of finance. In this session. Tom Seal, Senior Research Director in IDC's Enterprise Application Team, and Christophe Kasolowsky, Aptitude EVP for Product Innovation and Strategy, discuss the key findings of the research, the current and future state of the finance office, and the potential business impact of a forwardthinking finance department.

Benjamin Martin, Managing Director, CFGI David Lopez, Senior Manager, CFGI Mark Aubin. SVP Solutions Consulting. Aptitude Software

Tom Seal. Senior Research Director. IDC

Christophe Kasolowsky, EVP, Product Innovation & Strategy, Aptitude Software

6.00 - 6.15 p.m.

NETWORKING BREAK

CORPORATION (IDC):

6.15 - 7.00 p.m.

7.00 - 7.45 p.m.

7.45 - 8.00 p.m.



PANEL DISCUSSION:

The digital mandate in Financial Services

Investing in the client experience: a look at what

Client First means to the Aptitude community

Financial Services is experiencing a digital revolution. While not always known as an innovative industry, new entrants to the landscape and customer expectations are necessitating change. As the keepers of critical data and increasingly well-versed in technology, the finance function is evolving to lead these organizations. On this panel, representatives from RBC, ING and Aptitude Software discuss trends and best practices in finance IT architectures within Financial Services, including the increasingly common move to a Cloud GL/ERP, the role of a subledger in an ERP-based finance architecture, and the value of a best of breed approach versus a single stack.

Aptitude launched the Client First program at AptConnect 2019 and since then we have committed to several areas of investment across the business to help delight our clients. In this session, we'll talk about the results of some of those investments across client service, user experience, support, Solution Management Services (SMS), and the results and action of the recent Client Survey.

Alex Curran and Nick Nesbitt will wrap up the day's events and present awards to selected clients.

Simon Andrews, Group CIO Finance & IT. ING Sherrie Ann Pollock. VP Insurance Transformation, IFRS 17, RBC

Tristan Atkins, Chief Technology Officer, Aptitude Software

Ryan Fugate, VP Corporate Development, Aptitude Software - (Moderator)

Alex Curran, EVP North America, Aptitude Software - (Moderator)

Anna Singer, Head of UX, Aptitude Software

Joli Riley, VP, Client First, Aptitude Software Sarah Werner, Head of Content & Communications, Aptitude Software

Alex Curran, EVP North America, Aptitude Software Nick Nesbitt, EVP International (EMEA & APAC), Aptitude Software



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3.45 - 4.00p.m.

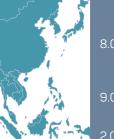
CLOSE: Closing remarks and awards

AGENDA AptConnect 2024

FRIDAY NOVEMBER



SESSION



8.00 - 9.00 a.m

9.00 - 10.00 a.m.

2.00 - 3.00 p.m.

On-Demand



EVENT OPENS





LIVE WELCOME & ROUNDTABLE



LIVE Q&A:

With the Aptitude Software Senior Leadership Team



KEYNOTE:

CEO Remarks: All eyes on now



KEYNOTE:

Pioneering where finance and technology meet



KEYNOTE:

Putting users at the heart of product design



KEYNOTE:

Aptitude products in action



PLATINUM SPONSOR PRESENTATION: CFO Hero



PLATINUM TECHNOLOGY SPONSOR PRESENTATION: Cloud innovation in Finance with AWS

SYNOPSIS

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Aptitude Software's APAC Regional Vice President, Adam Flowers, kicks off AptConnect 2021 and discusses his perspectives and the finance trends he and our clients are seeing first hand in the APAC region.

Join the Senior Leadership Team at Aptitude Software for a live Q&A session. CEO, Jeremy Suddards, will be joined by the entire Senior Leadership Team on this live and open Q&A. We invite our APAC guests to join this session to discuss AptConnect content, Aptitude's plans for the region and any other top of mind topics.

As 2021 draws to an end, Aptitude CEO, Jeremy Suddards, will be discussing why all eyes are on finance to act now and take advantage of a perfect storm of opportunity. Jeremy will reflect on the year that has passed and why he feels there is a ready platform for change in the finance function – and where Aptitude will be focusing to help its community succeed and grow.

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SPEAKERS

Adam Flowers, Regional VP APAC, Aptitude Software

Jeremy Suddards, Chief Executive Officer, Aptitude Software Christophe Kasalowsky, EVP Product & Innovation, Aptitude Software Tristan Atkins, Chief Technology Officer, Aptitude Software Kelvin Lynch, Chief Delivery Officer, Aptitude Software Adam Flowers, Regional Director APAC, Aptitude Software

Jeremy Suddards, Chief Executive Officer, Aptitude Software

Christophe Kasolowsky, EVP, Product Innovation & Strategy, Aptitude Software

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Matt Kelley, Principal Solution Consultant, Aptitude Software

Charith Mendis, Digital Transformation and Cloud Leader, AWS

AGENDA





SESSION

CLIENT CASE STUDY: T-MOBILE T. Mobile

When regulations collide: why T-Mobile selected Aptitude for lease accounting and the value of integrated finance solutions

Aptitude^{*}

BETTER, FASTER, SMARTER:

What's next for insurers post-compliance



REVENUE MANAGEMENT:

Using holistic revenue management to drive growth



Q&A SESSION WITH INTERNATIONAL DATA CORPORATION (IDC):

The future of the finance function



PANEL DISCUSSION:

The digital mandate in Financial Services



PANEL DISCUSSION:

Investing in the client experience: a look at what Client First means to the Aptitude community



Aptitude CLOSE: Closing remarks and awards

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Alex Curran, EVP North America, Aptitude Software - (Moder Anna Singer, Head of UX, Aptitude Software Joli Riley, VP, Client First, Aptitude Software Sarah Werner. Head of Content & Communications. Aptitude Software

Alex Curran, EVP North America, Aptitude Software Nick Nesbitt, EVP International (EMEA & APAC), Aptitude Software



Meet the guest **SPEAKERS**



David -ourie **KPMG**

executives to transform their finance organizations to be ready for the future. With more than 25 years of experience in KPMG advisory and audit practice, he understands both the financial reporting and the business aspects of the finance organization. He provides a broad spectrum of transformation advisory and data and analytics services to clients.



Charith Mendis

Charith Mendis is a Worldwide Financial Services Specialist at AWS, leading global market development efforts for banking. He works with customers to help them transform their existing businesses and bring new and innovative solutions to their consumers by leveraging AWS services. Prior to AWS, Charith led global finance and risk transformation programs, helping his FSI customers implement data and reporting solutions and operating models to improve operational efficiencies and drive business value



T-Mobile

As a director at T-Mobile, the 2nd largest wireless operator in North America. Lora Tarabeih leads the Asset and Lease accounting teams. She helps the organization build out the fastest 5G network, overseeing the financial backbone of millions of assets and 120K+ leases.

Lora has ample experience leading the teams through multiple mergers, accounting standard adoptions, and system implementations. including the ASC 842 leasing standard. As a leader, she is passionate about inspiring and driving the team to do things the right way, disrupt old processes, and build better and stronger practices.

Aviva

2017 and is currently leading IFRS 17 Data &

Systems where he is accountable for IFRS 17

ledger and the group consolidation system.

changes to data, models, the Aptitude CSM tool,



Sherrie Ann Pollock, CPA, CA, is VP. Insurance Transformation – IFRS 17 at RBC. Based in Toronto, Canada, Sherrie Ann is responsible for implementing the integrated IFRS 17 (Insurance Contracts Accounting standard) program which includes data, insurance ledger and calculation engine,

management reporting. Sherrie Ann has over 20 years' varied experience with RBC during which time she has held senior roles in Taxation, Finance & Internal Audit in Canada, Europe and the USA.

and related financial, regulatory, and



Tom Seal is a senior research director in IDC's European enterprise applications team. He has over 20 years' experience as an analyst, consultant, and technology procurement manager. He focuses on the ERP market and the future of the finance and procurement functions. Current research includes investigating the business case for ERP modernization and the actuarial models alignment and standardization economics of cloud technology.

Tom

In addition, he is part of IDC's Intelligent Business Operations and Augmented Humanity practices. Seal also delivers consulting on the development and commercialization of ERP and financial applications.



Sidhartha **Chartis** Research

Group, HCL and Cognizant.

James is IFRS 17 Data & Systems Research with more than 20 years of Lead at Aviva Group Plc and has 30 years experience in the financial, energy and Financial Services experience including 17 commodities markets in various functions years at EY, 10 years at the insurance division of across the trade and software development Lloyds, and 4 years at Aviva. At Lloyds, lifecycles. He has held various roles in product James was Financial Reporting Director and development, trading, risk management, latterly the Finance Operations and Change software development and consulting in banks, Director. hedge funds, and risk advisory and software firms, including Standard Chartered Bank, TCG At Aviva he has been involved in IFRS 17 since



Nancy **OneAmerica**

Nancy is a Senior Director of Accounting at OneAmerica. Nancy is a highly seasoned strategic finance leader with over 20 years of experience that spans every aspect of accounting operations, finance systems and processes.



Benjamin Martin

Benjamin Martin is a Managing Director with CFGI, providing accounting and consulting services to manufacturing, life sciences, consumer markets, media & entertainment, technology, and financial services clients.

Mr. Martin began his career in the audit practice of PricewaterhouseCoopers (PwC) and advanced to the level of Senior Associate. Prior to joining CFGI, Mr. Martin was an Internal Audit Manager at a well-known, publicly traded medical device manufacturer and distributor. Most recently, and prior to rejoining CFGI, Mr. Martin was the Corporate Controller for a Multi-State Operator whom he took public.



Simon Andrews

Simon Andrews is the Group CIO at ING Bank, located in Amsterdam, Simon is a member of the Management Team of the bank's Chief Technology Officer. His accountabilities cover the technology portfolios of the bank's central CXO functions and related Global Services. During his 27 years at ING, he has held management positions across, Sales, Operations and Technology functions in Australia, UK, Thailand and the Netherlands.



York office at CFGI, providing accounting and consulting services to clients in a variety of

David is a revenue recognition and Revenue Management Software ("RMS") implementation specialist with over 12 years of experience. Prior to joining CFGI, Mr. Lopez worked in the Audit practice at Deloitte & Touché.

Since joining CFGI. David has worked on over 10 RMS implementations in a variety of industries including software, technology, and telecommunications.



Kristina Reid is a Senior Consulting Partner at EY serving Financial Services clients and leads the CFO strategy practice in the US. With over 20 years of experience across industry and consulting in the US and Europe,

Kristina advises CFO clients and their teams on turning their vision into roadmaps in a pragmatic and actionable way.

With her large-scale finance transformation experience, she focuses on driving business value incrementally across the transformation lifecycle through an outcome-based, human centered approach.





Jeremy Suddards CEO

Jeremy joined the Aptitude Software board as CEO in September

2019. Prior to his appointment he ran the International region for Aptitude Software as part of the Senior Leadership Team. During that time he oversaw the launch of Aptitude Software in Asia including the build-out of the go-tomarket and delivery functions in the region. Jeremy also launched the Aptitude Insurance Calculation Engine into the International market and built out the Strategic Partner program. Prior to joining Aptitude Software, Jeremy undertook a number of Executive roles at Hewlett Packard Enterprise including Vice President, Financial Services Industries, EMEA.



Executive VP, North America

Alex Curran held a number of roles within the Group before she transferred to Aptitude Software's North American operation in 2010. Alex has been instrumental in the growth of Aptitude Software's North American client base and now serves as Executive Vice President, North America at Aptitude Software. In this role, she is responsible for leading the North America region which represents over 50% of the organization's revenue.



Kasalowsky **EVP. Product Innovation and**

Christophe joined Aptitude Software in July 2021 as EVP, Product Strategy and Innovation. He joins from EY where he led the EMEIA Finance Consulting business, made up of more than 300 professionals delivering technologyenabled finance change for multi-national corporations.

Christophe is a proven and recognized finance and technology subject matter expert having successfully delivered on-the-ground finance transformation implementations and has also published research and thought leadership on the CFO Agenda and the future of finance.



Executive VP. International

Nick Nesbitt joined Aptitude Software in August 2020. As EVP for International, he is responsible for sales, growth and retention. He leads the International Leadership Team comprising of sales in EMA & APAC, Strategic Accounts, International Delivery, International Alliances and Presales.

Nick has over 20 years' experience in the Corporate Performance Management and Regulatory Reporting market, and has built and managed large CPM technology practices in independent software vendors, where he was involved in selling and delivering solutions across a wide range of industry sectors and customers.

Meet our **SPEAKERS**



Atkins Chief **Technology** Officer

Tristan Atkins serves as the Chief Technology Officer at Aptitude Software. In this role, he leads our Innovation Center and is responsible for our multi-disciplinary technology teams that design, build, test, and operate the solutions that drive some of the world's largest organizations. Over his 30-year career, Tristan has held numerous technical, product and business roles, most recently with Aptitude as the Global Development Director where he oversaw the implementation of agile, CI/CD, and DevSecOps and led the transition to a cloud-first product strategy and architecture.



Kelvin **Chief Delivery** Officer

in 2018 after holding Finance Change management and strategy roles at Deutsche Bank, Credit Suisse, and other leading organizations. At Aptitude, he initially served as the VP of International Delivery before transitioning into his current role as the Chief Delivery Officer. He is responsible for the successful implementation of Aptitude product solutions, and the commercial and strategic success of the Professional Services group as a whole. He is a member of the Aptitude Senior Leadership Team and serves as the Executive Sponsor of the firms' Diversity and Inclusion initiative



Girard **Head of Product** Strategy & **Innovation**

Julie has held multiple roles during her tenure at Aptitude. Currently, as the Head of Product Strategy and Innovation, Julie leads a team dedicated to understanding the needs of the finance and technology community and translating those needs into new solutions.

Prior to her current role, Julie held multiple roles in the Aptitude Professional Services Group including Functional Lead and Managing Consultant where she oversaw a portfolio of large-scale implementations of Aptitude's solutions and drove process and organizational improvements for the North American Professional Service department. Prior to Aptitude, Julie was a manager in public accounting, providing assurance services to large and complex organizations.



Mark Aubin **SVP, Solutions Consulting NA**

Mark brings over 20 years of experience in enterprise financial applications and has served in senior roles as a product vendor, consumer, and consultant. He has deep finance and operational knowledge across diverse industry sectors and has been focused on software solutions for financial regulatory compliance and modernization since 2007.

At Aptitude Software, Mark is responsible for solution consulting (presales) for North America. Mark's team is responsible for guiding our prospects, partners, and clients to a world of financial confidence through the use of Aptitude Software's market-leading finance products.



Alan Strategic Finance **Advisory**

Alan works in our Strategic Finance Advisory (SFA) Team. In this role he both designs the functional requirements for new products and solutions and applies existing Aptitude Software assets to address the requirements of the latest regulatory pronouncements.

Alan is an Associate Chartered Management Accountant who, prior to joining Aptitude Software, spent over 11 years working in Finance departments of tier 1 investment banks as a product controller and subsequently designing controls and control frameworks.



Client First

Joli joined Aptitude Software in 2011 as a Technical Lead within the Professional Services team and has worked with multiple clients across North America, Europe, Africa and Asia. Joli is a Subject Matter Expert in the Aptitude Accounting Hub, Aptitude Platform and Aptitude's solutions for the regulatory standards IFRS 15/ASC 606 and

After a successful time as Global Leader, Solution Management Services, Joli has recently assumed the role of VP, Client First. She is passionate about ensuring the client experience remains exceptional throughout their engagement with Aptitude. Joli is ITIL certified and has been an agile scrum master for over 10 years



Ryan **Lugate VP.** Corporate **Development**

Ryan joined Aptitude's product team in 2017, where he spent the past several years working to maximize the value that Aptitude delivers to the market with its products. He has worked as a Global Product Owner across both Revenue Management (ARRE and AREV) and Insurance (AICE and IFRS 17) and supported many successful client go-lives during his time on the product team.

As VP of Corporate Development, Ryan is now looking for opportunities to help drive strategic growth for the business across its portfolio.



Anna **Head of UX**

Anna is a UX leader, design thinker and experience strategist with a background in fine art and philosophy. Over the last decade she has collaborated with large retail brands to create insight-led, human-centered products and services. Her design practice focuses on creating seamless, intuitive ways for people to interact with, navigate and embrace the invisible technology revolution. In the current experience economy, user expectations are evolving rapidly. Anna is crafting an experience strategy for Aptitude to exceed these expectations and increase our ability to augment and enhance how we live and work.



Lucinda Faucher **Head of Product**

Lucinda Faucher recently joined Aptitude Software's Product, Strategy and innovation leadership team in September 2021.

As Head of Product, Lucinda leads the Product Management function for Aptitude Software's portfolio of products.

Prior to joining Aptitude, Lucinda spent 10 years in Product Management, many of those years leading and building product & design functions in a number of industries globally.



Faulkner **Global Product** Owner

Alexis joined Aptitude Software in 2005 and has held a number of roles within the company. He initially joined as a consultant, delivering Aptitude's products to clients in many industries but with a focus on banking. More recently he was providing his product specialist knowledge to the presales team, delivering insights to new and existing clients wishing to use the first-class products Aptitude provides.

Now working as a Product Owner looking after ALAE. Aptitude platform, and Aptitude Calculate, he is excited to help take the products into the future.



Chris Roberts **Global Product** Owner

Chris arrived at Aptitude Software in 2009. During this time, Chris worked on several key global projects, and spanned several industries.

In 2017. Chris moved into his current role as

Global Product Owner for the Accounting Hub and has since been currently fully engaged, in both the day to day oversight of the solution and developing the Hub to meet the requirements of companies looking to embrace digital finance transformations.



Barlow **Global Product** Owner

Jack Barlow joined Aptitude Software in 2006 and has a breadth of experience across Product Management, Presales, and Consulting. As Global Product Owner for the Aptitude Insurance Calculation Engine, Jack is responsible for setting the vision and understanding market needs for these products so as to maximize value for Aptitude Software's clients.



roles during her time at Aptitude. Currently, as the Head of Content and Communications, Sarah is responsible for planning, creating, and managing content across Aptitude products and regions. Prior to Aptitude, Sarah worked as a marketing manager in the ISV and Developer Relations group at IBM. She holds an MBA from the University of Notre Dame.



Voskov **Global Product** Owner

Gene currently serves as the Global Product Owner for Aptitude Software's Revenue Management product suite. In this role, Gene is responsible for managing product strategy and overseeing the development and delivery of the Aptitude Revenue Recognition Engine and Aptitude RevStream products.

Gene has an extensive accounting background and also brings several years of experience in delivering in-person and virtual product training.



Adam Flowers Regional VP, **Asia Pacific**

Adam joined Aptitude in 2014 in a sales executive role working within our TMT customer base. As Aptitude expanded in APAC he took on responsibility for the region, moving with his family to Singapore in 2017. As the Regional VP for APAC, Adam is now responsible for all new business and client success initiative within the region.



Matt Kelley **Principal** Solution Consultant

Matt has spent the last seven years in Aptitude's Solution Consulting Group, helping prospects and clients understand the many possible applications of Aptitude solutions. He has deep expertise in the areas of data integration, data visualization, system performance tuning, and next-generation system architectures such as Big Data, and Elastic TO START LISTENING Auto-scaling Hybrid Clouds. Prior to Aptitude, he held roles at Opsview, Collaborative Consulting. and Logic PD.



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Aptitude Software provides software solutions that enable finance professionals to run their global businesses, forecast decision outcomes, and comply with complex regulations. Uniquely combining deep finance expertise and IP rich technology, Aptitude gives finance leaders the tools they need to transform their business and achieve their ambitions.

Aptitude is proud to have served the offices of finance for over 20 years, delivering financial control and insight to create a world of financial confidence for our global clients.

Aptitude Software supports businesses with combined revenues approaching \$1 trillion and over 500 million end customers Headquartered in London, Aptitude Software is an operating company of Aptitude Software Group plc.

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