



Introduction & Purpose

Serving CFOs and Financial Leaders of Middle-Market and Growth-Oriented Companies

The CFO Executive Summit was launched in 2020, in partnership with the UCI Merage School of Business, with the mission of creating a non-solicitous environment for thought leadership and peer-to-peer knowledge transfer for middle market to large cap company CFOs in Southern California. We sponsor events throughout the year to educate CFOs on topics they are facing in the marketplace. To help steer our organization and drive relevant content, we have assembled an advisory board of CFOs to provide strategic direction to our growing organization.

Programming & Events

The CFO Executive Summit provides a wide range of programming, content, and resources aimed at expanding the knowledge base of our CFOs. These include:

- CFO Executive Summit Conferences at UCI Paul Merage School of Business
- Exclusive Economic Forecasts with UCI Professor & Chief Economist, Chris Schwarz
- Tactical Series Webcasts Drawing on Founding Sponsors' Disciplines
- "CFO Meet" Panel Discussion Series (Examination of interdepartmental relationships)
- Peer-to-Peer Networking Opportunities (Happy hours, holiday receptions, and site visits)
- Fireside Chats with Leading CFOs

The CFO Advisory Board

The CFO Executive Summit has assembled an advisory board of respected financial leaders who help direct the organization. Along with the UCI Paul Merage Business School, the advisory board provides support and insight, regarding strategic direction, content and programing. The CFO Executive Summit is honored to have advisory board participation from CFOs representing the following organizations:

- AICPA
- Kind Lending
- Mavrik Dental Systems
- Ravn Alaska
- Stone Brewing Company
- Summit Healthcare REIT
- The Toll Roads
- UCI Merage Business School
- VIZIO
- Western Digital
- Xperience Restaurant Group

WHAT THEY ARE TELLING US

Our CFO Advisory Board will continuously provide direction regarding technical and timely topics that are most relevant in the marketplace. Key initial input from the advisory board includes the importance of providing the following:

- ✓ Educational Opportunities
- ✓ CFO-to-CFO Connections
- ✓ A Safe, Non-Solicitous Environment

JOIN US

Become a Member and Join Our Email Communications List



Please send us an email at
cfoexecutivesummit@gmail.com



Be a part of the
[CFO Executive Summit](#)
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The CFO Executive Summit is an exclusive organization dedicated to serving corporate financial leaders to include both CFOs and rising future CFOs.

**Membership is free and open to those holding CFO, VP
and Director level Finance and Controller roles.**

FOUNDING SPONSORS

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MOSSADAMS



Our Affiliation to the UCI Paul Merage School of Business

Recruitment of qualified candidates is a major challenge for CFOs of all industries. In alignment with Merage School's Centers of Excellence, the CFO Executive Summit and our Founding Sponsors will serve as a bridge for CFOs to tap into the university's abundance of resources. These include higher learning, research opportunities, Master of Finance Capstone project opportunities, and continuing education. The Merage School's state-of-the-art facilities will host future in-person events.