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## Controllers Forum

### Speakers

Fall 2012

	<p><b>Naresh Bansal, VP, Corporate Controller, Zscaler</b> Naresh Bansal is the Vice President, Finance and Controller for Zscaler, Inc., a leader in Cloud based Secure Gateway to the Internet on any device anywhere and provides Cloud security (SaaS) integrated web, mobile &amp; email. He has more than twenty years of experience leading the global finance teams for software and SaaS Companies, have completed successful IPO and numerous M&amp;A transactions. Prior to Zscaler, Naresh was Interim CFO for 24/7 Customer, Inc., VP Finance and Controller for Satmetrix and VP, Finance and Controller for Sage Software, Inc, global leader in mid-market business applications. Naresh is a Certified Public Accountant in California, CMA, CFM, CA (India) and B.S. in Business Administration, from Panjab University, also he is a member of the Financial Executives International.</p>
	<p><b>Manpreet Grover, Managing Partner, SOAPProjects</b> Manpreet is CEO and Managing Partner of SOAPProjects, Inc, managing the day to day operations of the Company and is responsible for managing a variety of clients in the high tech, software, retail and services industries. She is a natural leader who brings thought leadership, critical thinking, strong project management skills, and exceptional interpersonal skills to each engagement. She has developed numerous project plans and works diligently to ensure each client receives the skill level required for each engagement. She is responsible for handpicking each staff member, managing each employee's progression and professional development, and most importantly, ensuring our clients attains their compliance and audit goals. Apart from her accounting and auditing knowledge, Manpreet success rests heavily upon her ability to deliver and strong project management throughout each engagement. She is cost conscious and works intelligently and diligently to meet our clients' expectations.</p>
	<p><b>Omid Fardanesh, Manager, Deloitte</b> Omid is a Forensic and Dispute Services manager with Deloitte Financial Advisory Services LLP (Deloitte FAS). Omid has over eight years of experience in conducting forensic investigations. Omid has been focused on conducting fraud, anti-money laundering, OFAC, Foreign Corrupt Practices Act (FCPA) and other financial crime investigations. During his tenure he has led investigations in a number of different countries including, but not limited to U.A.E., India, China, Sweden, Brazil, Colombia, Russia, Korea, Ireland, Switzerland and Japan. Omid focuses on helping clients with regulatory compliance, FCPA mitigation, and third party management, as well as general forensic investigations. Omid's experience centers around working collaboratively with clients on national and global forensic investigation helping them resolve complex risk, ethical and compliance issues affecting their organization.</p>
	<p><b>Kim Le, Managing Director, A2Q2</b> Ms. Le is a recognized expert in internal controls, business process re-engineering and M&amp;A integration. In addition to consulting on financial process efficiency, Ms. Le counsels clients on corporate governance matters, including SOX readiness. Ms. Le is a frequent speaker on scaling finance infrastructure for growth and promoting Asian and women leadership for Ascend's Executive Insight Series. Ms. Le was named Asian Business Woman of the Year in 2010 by the National Council of Asian American Business Association. In 2009, the California Public Utility Commission recognized her with the Women in Business Excellence Award. Prior to founding A2Q2 Consulting in 2003, she practiced public accounting at Arthur Andersen for 8 years. Ms. Le is a CPA in the states of Arizona and California and is a member of the American Institute of Certified Public Accountants (AICPA), California Society of CPA, and Institute of Internal Auditors (the IIA). She is also a Certified Internal Auditor. Ms. Le serves on the advisory board of the Silicon Valley - National Association of Corporate Directors (NACD). She has also served on the board of Astra Women's Business Alliance, a regional partner organization to Women Business Enterprise National Council (WBENC), which helps women-owned businesses. She was also on the Audit Committee of Lincoln Child Center, an Oakland-based not-for-profit organization helping at-risk families and children.</p>
	<p><b>Joseph Kuo, Business Unit Controller, Marvell</b> Joseph is a business unit controller at Marvell. In this role, he is responsible for managing and reporting the financial performance of a major product segment, driving activities including strategic planning, product lifecycle management, quarterly forecasts and operating expense management. Prior to joining Marvell, Joseph was a manager at Safeway and had held pricing positions within IBM Software Group. He has a BA in Economics from University of California Berkeley and a MBA from Yale School of Management.</p>
	<p><b>Jenefer Chin, Director, WW Embedded OEM Finance, McAfee</b> Jenefer Chin is a Director of Deal Desk and formerly the Director of Technical Revenue Accounting at McAfee. In her current role, she is responsible for WW Embedded Sales</p>



and Channel Partner deal structuring, pricing, and benchmarking. She has held different positions in the technology sector from M&A Integration, revenue accounting to controllership at Symantec, Bloom Energy and McAfee. Previously, she spent 8 years in Public Accounting both with Deloitte Advisory Group and PwC Assurance Group. Jenefer has a Bachelor of Arts in Business Economic from University of California Los Angeles. She is a Certified Public Accountant in California and is a member of the American Institute of Certified Public Accountants.



**Helen Kane, President, Hedge Trackers**  
Helen Kane, President, founded Hedge Trackers, LLC in April 2000. Her duties involve monitoring FASB/IASB pronouncements, reaching out to accounting firm derivative accounting specialists, overseeing auditor and SEC responses, and consulting with clients contemplating complex derivative accounting applications. In addition, Helen chairs both the East and West Coast annual Accounting for Derivatives Conferences featuring derivative specialists from the FASB and SEC. She also provides training to audit firms, state regulators, the AICPA Credit Union Conference, and guest lectures at local universities. Before founding Hedge Trackers, Helen was a Senior Manager at Deloitte & Touche in the Capital Markets Group, leading their Silicon Valley risk management practice. Prior to Deloitte, she served in treasury, finance and accounting roles for multinational corporations. Helen holds a B.A. (with Honors) from Arizona State University and a Masters in International Management from The Garvin School of International Management (“Thunderbird”).



**Dean White, Senior Manager, SOAPProjects**  
Dean White is an Advisory Services Senior Manager with over 15 years of finance experience and has lectured in both the US and Canada on topics including Best Practices in Corporate Credit Audits, First Year Success in the Big Four and most recently SOX. Dean has spent a combined 8 years in Big Four firms, both international and domestic, with a focus on financial audit and SOX compliance engagements. Most recently he served as Director of SOX for JDSU. Prior to that he was a Senior Manager at Ernst & Young LLP, working in the firm’s Business and Risk Services sector. During the two years spent on the Cisco engagement, Dean spent the better part of a year serving as an interim Director of SOX. As a Chartered Accountant from Canada, he brings a unique depth of experience in the technology, banking, and insurance sectors having worked with Cisco, JDSU, Bank of Nova Scotia, Bank of Montreal, Manulife Insurance, DMG World Media, ABM Industries.



**Josette Ferrer, Managing Partner, Clairant Advisors**  
Josette Ferrer is the founder, CEO, and a Managing Director of Clairant Advisors, a valuation firm which serves Fortune 500 firms as well as smaller entrepreneurial companies. She has more than fifteen years of experience providing valuations in support of financial statement reporting and tax planning. Prior to founding Clairant Advisors, Josette was the U.S. Practice Leader of Marsh’s Valuation Services Group. Her career includes serving as the Managing Director responsible for starting the S.F. Valuation Services Group of WTAS, Inc., a former subsidiary of HSBC Group. Prior to WTAS, Josette held a variety of valuation leadership positions with Huron Consulting Group and Arthur Andersen. Josette has been a guest speaker for a wide variety of forums, including Financial Executives International, the Practising Law Institute, the S.F. Bar Association, and BIOCOM. Josette holds a B.S. in Business Administration, from U.C. Berkeley.



**Patrick White, Senior Manager, FrankRimmerman**  
Patrick is a Manager in the Assurance and Advisory Department of Frank, Rimmerman + Co. LLP. His assurance experience includes small and mid-sized, privately held companies in a variety of industries. In his 9 years at the firm, Patrick has gained extensive experience in accounting for Preferred Stock, Warrants, and Stock Options. He is responsible for the firm’s stock based compensation consulting practice and has experience with multiple software platforms available for stock administration. Patrick holds a Bachelor’s degree in Business Economics with Emphasis in Accounting from the University of California, Santa Barbara. Patrick is a member of the AICPA and the California Society of Certified Public Accountants.



**Kelly Gaffaney, Partner, Deloitte**  
Kelly Gaffaney, a Partner with Deloitte Tax LLP, has more than 15 years of experience providing tax consulting services to companies primarily in the high technology, media and telecommunication industry. She primarily serves large, multinational, publicly-traded companies and specializes in tax provisions, consolidated tax returns, corporate reorganizations, and accounting methods. Kelly works with several multinational companies and teams within Deloitte’s international tax network to identify and implement worldwide tax efficient strategies as well as the overall necessary transfer pricing for companies in multi-jurisdictional locations. During her career, Kelly also spent two years in Deloitte’s National Tax Office in Washington, D.C. working in the Accounting Methods and Periods group. She received a B.S. in Accounting from Saint Mary’s College of California in 1995 and a M.S. in Taxation from GoldenGate University in 2003. She is licensed as a CPA in California. Kelly also serves her local community as a Board member and Treasurer of San Jose Parks Foundation.



**Aaron Victorino, Director, PwC**  
Aaron Victorino is a Director in the Transaction Services practice at PricewaterhouseCoopers LLP in San Francisco specializing primarily in the technology industry. Aaron has delivered technical accounting and SEC reporting advice to domestic and foreign SEC registrants under both US GAAP and IFRS in connection with capital markets activities, SEC registrations, mergers and acquisitions and IFRS conversions in the US, Europe and Asia. Aaron has technical expertise in several complex areas including revenue recognition, stock-based compensation, capitalization of development costs and business combinations. Aaron spent two years in Europe providing such advice to clients in the telecommunications, consumer electronics and financial services industries. Aaron started as an auditor in Silicon Valley.

**Joseph Howell, Managing Director, Webfilings**  
Joseph Howell is co-founder and managing director of WebFilings([www.webfilings.com](http://www.webfilings.com)) and co-founder of the SEC Professionals Group. Joe Howell has over 25 years of experience in senior financial management and SEC reporting experience, including with early stage companies. He previously served as Managing Director of Financial Intelligence, LLC from 2007 until co-founding WebFilings in August 2008, as Chief Accounting Officer from 1988 to 1995 and Acting Chief Financial Officer from 1994 to 1995 for Borland Software (NASDAQ: BURL) and as Chief Financial Officer of Merix Corporation (NASDAQ: MERX) from 1995 to 1998. In addition, he was also the Chief Financial Officer from 1998 to 2000 of EMusic.com (NASDAQ: EMUS), which was acquired by Universal Music Group, as well as, from 2002 to 2004, the Chief Financial Officer of Eid



Passport and, from 2000 to 2002, the Chief Financial Officer of Webridge, Inc., which was acquired by Click Commerce. A certified public accountant (inactive), he earned a BA from the University of Michigan and an MS in Accounting from Eastern Michigan University. WebFilings is a privately held Los Altos, Calif., and Ames, Iowa-based company Calif.-based company that offers the first and only end-to-end solution for external financial reporting. The company develops and markets a fully integrated, cloud-based solution dedicated to meeting SEC reporting requirements.



Robin Basham, Managing Partner, CEO, EnterpriseGRC Solutions  
 Creator of Facilitated Compliance Management Software, and founder of Phoenix Business and Systems Process, Inc. Recent ITPreurs partner, Robin now leads Cloud and Virtualization training in the San Francisco and Bay Area. As EnterpriseGRC Solutions lead architect, Robin brings team experience leveraging platforms such as Oracle, Archer, SAP, Web Applications like Joomla, Visual Studio, Access and SharePoint. As an Archer Certified Consultant and SharePoint architect, she's known for successful GRC implementations, supplying overall design, development and training to companies ranging from start up to fortune five hundred. Over the last decade Robin has architect more than 70 GRC programs, delivering end to end solutions with full knowledge transfer to program owners and users. Corporate leadership includes acting as technical liaison for ISACA in development of the OCEG Redbook V1, TC Co-Chair for OMG's Open Regulatory Compliance Architecture (ORCA) project, working with co-chairs EMC's Chief Governance Officer, Dr. Marlin Pohlman and world expert, Dr. Said Tabet. Robin's companies remain active in emerging standards with participation on recent releases from ISACA® for both Oracle R12 and SAP ECC 6.0 controls. Ms. Basham is also a director for the Association for Certified Green Technology Auditors, ACGTA, a frequent committee contributor to the ISACA Silicon Valley Chapter and liaison to the ITSMF SV chapter, as well as participant in Cloud Security Alliance. EnterpriseGRC Solutions is recently added to the Cloud Credential Council and is named to the certification committee of The Holistic Information Security Practitioner Institute (HISPI). EnterpriseGRC Solutions is an active sponsor to Information Systems Audit and Control Association, ISACA, listed as corporate sponsor and many time CobiT trainer for the ITGI.



Jacqui Fifield, Senior Manager, Deloitte & Touche LLP  
 Jacqi is a senior manager in Deloitte's Governance, Regulatory & Risk Strategies practice specializing in Enterprise Risk Management (ERM). She works with executive management and board members to develop and implement integrated ERM programs, including defining risk governance structures, conducting enterprise risk assessments, defining corporate risk appetites, and developing risk response processes and dashboards to address key risks and promote accountability. She helps clients leverage their ERM capabilities to address risks that may limit achievement of strategic initiatives, integrate the enterprise risk assessment with other internal assessments including prioritizing the annual Audit Plan, and sustaining the ERM process to identify and assess risks on an ongoing basis. She has over 20 years experience leading ERM efforts and managing strategic planning and corporate economics departments at an energy company prior to joining Deloitte. Jacqi holds a B.A. in economics from the University of California, Los Angeles, and a masters degree in urban planning from the University of Washington.



Doron Rotman, Managing Director & National Privacy Leader, KPMG  
 Doron is a Managing Director in KPMG's Advisory Services practice with over 25 years of experience. Mr. Rotman is focused on providing Privacy and Information Governance Services. He is the national privacy service leader, a member of KPMG's national Privacy Leadership Council and a member of KPMG International Privacy Leadership team. He has extensive high tech, financial services, healthcare, manufacturing and government industry knowledge, both in the information technology and the accounting and finance aspects. Doron has extensive knowledge of Information Technology's impact on financial processes within organizations. Doron served as the artner In Charge of KPMG Consulting (Israel), and the CIO of KPMG Israel.



Jay Swaminathan, Senior Manager, SOAPProjects  
 Jay Swaminathan is a Senior Manager at SOAPProjects, Inc. He provides Internal Audit and IT risk consultation to his clients. Jay has more than 10 years of experience in varied industries. In his current role at SOAPProjects, he specializes in implementing optimization and process improvements for his clients in compliance and other areas. His expertise includes indepth knowledge of Oracle EBS, related tools and methodologies to evaluate the ERP system. Prior to SOAPProjects, Jay was with the Risk Advisory Services in Ernst & Young. He was responsible for managing and executing review of IT systems as part of financial and Sarbanes-Oxley 404 audits of major corporations like Seagate, Spansion, and Copart. Jay was an Oracle Subject Matter Resource (SMR) at Ernst & Young practice and instructed various Oracle training sessions. Jay earlier worked for Oracle Corporation, validating business designs and systems for the Oracle E-business Suite. He was a practicing Chartered Accountant in India and provided assurance, internal audit, taxation and other consulting services. Jay is the President of the ISACA Silicon Valley chapter and leads the 700-member organization. He steers the organization's goals and objectives and along with a team of board members, executes programs for the benefit of the members. He instructs the CISA review courses and is a regular peaker at different conferences. Jay is a CPA, a Chartered Accountant and an undergraduate in Management from Bangalore University. He holds CRISC, CISA and ISA certifications.



Garrett Herbert, Partner, Deloitte  
 Garrett leads the Silicon Valley M&A Transaction Services practice in San Jose, CA and is the national leader for M&A Transaction Services for the Telecom, Media, and Technology industry group. Garrett has over 13 years of dedicated M&A experience. He has extensive transaction experience in advising financial and strategic buyers on due diligence, accounting structuring and financial reporting aspects of transactions in technology, software, and internet services transactions both domestically and internationally. In addition to his M&A experience with Deloitte, Garrett has M&A experience as an investment professional in industry with Mentmore Holdings Corporation (a private equity group), Stellex Technologies, and Register.com (NASDAQ: RCOM) where he was responsible for target evaluation, due diligence, divestitures, and post-transaction integration. Garrett has a B.A. Economics/Accounting from College of the Holy Cross and a Certified Public Accountant, State of New York.



Sudha Chadalavada, Director of Accounting Policy and Compliance, Extreme Networks  
 Sudha is a California CPA and a Certified fraud examiner currently is the Director of Accounting Policy and Compliance at Extreme Networks managing the SEC, Sox, Technical Accounting and Stock administration. Sudha has over fifteen years of experience in accounting and finance and currently specializes in SEC Reporting. Sudha has extensive and broad range of work experience including external audit, private company controllership and public company regulatory compliance and reporting. Sudha brings great breadth of expertise and experience in presenting and teaching the CMA review course. Sudha is the current President of the IMA Palo Alto Chapter and had led the association to #1 worldwide.



Ana Maria Flores Velez, Director of Operations Finance, Proteus Biomedical

Ana Maria is currently the Committee Chair for the Controllershship Forum program at the Peninsula Palo Alto Chapter of IMA. Ana Maria has over 20 years of experience in financial planning, accounting, forecasting, reporting, operations finance, manufacturing and product cost management. Ana Maria worked for Apple Computer for 12+ years. She worked in different capacities ranging from Financial Analyst, Finance Manager to WW Product Cost Controller. She worked as a Controller of the Cardiac Surgery Division of Guidant, a medical device corporation. She worked for Southwall Technologies as an Operations Controller. Later on, she joined MAP Pharmaceuticals, Inc., a bio-pharmaceutical company, where she work as a Controller for 5 years; during this time she set up all accounting and financial processes required to bring a pre-IPO company to a public status. Currently, she is working for Proteus Biomedical, Inc., as its Operations Finance Director. During her professional career, she has directed the development and implementation of state-of-the-art systems to achieve cost-reduction improvements while maximizing corporate profitability. She has implemented accounting systems, Sarbanes-Oxley Compliance, stock based compensation, and product cost processes. Ana Maria has a Master in Business Administration with emphasis in Accounting and Finance from the Santa Clara University in California. She obtained her BS in Business Administration from La Escuela Bancaria y Comercial in Mexico City. She is fluently in Spanish.