SEAN BAKER, Inclusiveness Consultant | Talent Attraction and Acquisition (TA²), EY

Sean has been with EY for over 10 years. Prior to joining EY, he received a Master of Accounting from UNC-CH and is a licensed CPA. Sean was originally a specialist in working on Initial Public Offerings (IPOs) while at in a client serving role at EY.

Sean has a passion for recruiting and diversity and it has led Sean to his current role as an Inclusiveness Consultant. Sean now consults with recruiters, colleges, and clients across the country on how to attract and support the best and most diverse mix of talent. He leads efforts around disabilities inclusion and has counseled and mentored many students with disabilities on their future career path. He lives in Michigan with his family and is a licensed foster parent.

AARON BEAM, Former CFO of HealthSouth Corporation

Keynote Address

Mr. Beam was a co-founder of Healthsouth and the company’s first CFO. From 1984 to 1996 he helped grow Healthsouth into a Fortune 500 company. However, in 1996 he took part in an accounting fraud at the company that resulted in one of the largest corporate frauds in the history of the United States. In 2003 he pled guilty to the crime and was sent to federal prison.

He began his public speaking career in 2008 and as of 2018 has spoken to over 500 different groups. These include universities, associations, companies, churches and civic groups. His primary message is about corporate fraud, who is actually responsible, how they take place, and what can be done to prevent frauds such as Enron and Healthsouth. While Mr. Beam does not consider himself a motivational speaker, he does hope his speeches will motivate people to live a more ethical life.

LISA BEAUDDON, CMA, CSCA, CAE, Senior Director of Business Development, Institute of Management Accountants (IMA)

As Senior Director of Business Development for the Institute of Management Accountants (IMA®), Lisa Beaudoin works with companies and educational institutions around the world to create awareness of the benefits of membership in a professional association, as well as the benefits of earning the Certified Management Accountant (CMA®) certification.

Prior to joining IMA, she was the Accounting Department Chair at Cleary University in Ann Arbor, Michigan. Earlier in her career, Lisa held various accounting and financial management positions at Ford Motor Company, Ford Credit, and IBM Corporation. She holds a BBA from the University of Michigan, an MBA from the University of San Diego, and recently earned an Executive Certificate in Nonprofit Management from Northwestern University’s Kellogg School of Management.

JILL CASTILLA, President and Chief Executive Officer, Citizens Bank of Edmond

Jill Castilla leads Citizens Bank of Edmond as its President and Chief Executive Officer, and Chairwoman of its bank holding company. Castilla joined Citizens Bank of Edmond in 2009, transforming the struggling institution into one of the most innovative community banks in the nation. Most recently, Castilla partnered with Mark Cuban and Teslar to create the award-winning PPP.BANK website to support small businesses during the COVID pandemic, and she filed a patent for the creation of a full-service electronic banking facility.

On the national stage, Castilla serves as an appointed Civilian Aide to the Secretary of the Army, a member of the Federal Reserve Bank of Kansas City’s Community Depository Institutions Advisory Council, and an executive board member of the American Bankers Association. On a local level, Castilla serves on the boards of the Community Bankers Association of Oklahoma, MetaFund, Boy Scouts Last Frontier Council, Allied Arts, Mercy Oklahoma, YMCA of Greater Oklahoma City, and the Edmond Chamber of Commerce as well as an advisor to venture funds, incubators and start-ups. Castilla is Dean of the Southwest Graduate School of Banking at Southern Methodist University as well as a Presidential Advisor to the University of Central Oklahoma.

In 2020, Castilla was named as one of the 25 Most Powerful Women in Banking by American Banker. Castilla was also recognized as Banking Dive’s Executive of the Year, Cornerstone Advisor’s Banker of the Year, Journal Record’s Newsmaker of the Year in Banking and Finance, and Oklahoma City’s 50 Most Powerful Women.

Castilla holds a master’s degree in economics from the University of Oklahoma and a bachelor’s degree in finance from Hawaii Pacific University where she is a distinguished alumna. She is a graduate of the University of Wisconsin’s Graduate School of Banking and The Wharton School.
ANDREW COHEN, Award Winning Distinguished Lecturer, Education Entrepreneur & Creator of Future Traders

Andrew Cohen is an Academic Entrepreneur & Award Winning Distinguished Senior Lecturer of Finance at Old Dominion University: Creator of "Future Traders" educational trading simulation; Developer and investment strategist of the "Systematic Alpha" Model at Validea Capital; Former top Wall Street Trader and Market Maker, Public Speaker, Entsminger Fellow, and Bloomberg Expert.

His Awards include FMA's 2019 Innovative Teacher of the Year Award, ODU's 2019 University Teaching with Technology Award. He won an FIG Faculty Innovation Grant in 2018 for his innovative trading simulation, "Future Traders". He won the University Distinguished Teacher Award in 2017 while being selected as an "Entsminger" fellow. In 2015, he won the Outstanding Non-Tenure Faculty Award.

He began his career at Goldman, Sachs Training Program establishing a strong foundation for success. He utilized Future Traders along with his Wall Street trading and investing experience to elevate ODU's trading room lab into the top echelon of Bloomberg's Trading Rooms. Top performing trader and market maker on Wall Street allowed for financial independence at 36. Registered Investment Advisor Skilled in Stock and Option Analysis, Trading strategy, Bloomberg, and creating and utilizing Simulations to optimize student learning. He has an MBA in Finance, from NYU's Stern School of Business.

CHRIS FILS, Complex Manager, Raymond James & Associates

As the Florida Suncoast complex manager at Raymond James, Chris applies his years of experience and passion for assisting others to help his branch reach new heights while keeping clients’ best interests at heart.

Chris, who’s responsible for all aspects of branch profitability, works to support recruiting efforts, such as through home office visits and by enhancing the transition process of advisors joining Raymond James. Chris also devotes his time to providing consultations and education regarding the firm’s platform of choice while introducing advisors to resources designed to meet their clients’ needs.

Prior to joining Raymond James in 2018, Chris worked at Morgan Stanley as the manager of their Los Gatos, California, branch, located in Silicon Valley. As a former regional investment specialist for Merrill Lynch in New York City and Southern Connecticut, he drove revenue and assets under management for the entire region. Before relocating to New York, Chris worked as a successful financial advisor at Merrill Lynch in St. Petersburg, Florida.

A graduate of the University of South Florida, Chris holds a Bachelor of Science in finance and earned his MBA from Saint Leo University. He has also completed the rigorous requirements to earn his CERTIFIED FINANCIAL PLANNER™ certification, and is an Accredited Asset Management SpecialistSM professional, equipping him with specialized knowledge in financial planning.
LOREAL R. JILES, Director of Research – Digital Technology & Finance Transformation, IMA

Loreal Jiles is Director of Research – Digital Technology & Finance Transformation for IMA. In this role, Loreal works hands-on with leading and emerging digital tools, engages with leaders in the management accounting profession, and delivers research and resources that enable the upskilling of accounting, finance, and business professionals. Loreal also contributes to the strengthening of the global academic offering of collegiate accounting programs through collaborative research projects, knowledge sharing, and leadership of the IMA Higher Education Endorsement Program through IMA’s Committee on Academic Relations.

Prior to joining IMA, Loreal worked in the energy industry for nearly 15 years across a host of roles covering accounting, digital technology, financial reporting, change management, auditing and planning & performance management, including leading a Robotic Process Automation implementation in a finance organization.

Loreal is a former IMA Global Board Director and is a member of the IMA Technology Solutions and Practices Committee. In July 2020, Loreal authored an IMA report entitled “Transforming the Finance Function with RPA” and, in January 2020, published an article in Strategic Finance entitled “Govern Your Bots!” Loreal holds a B.S. in accounting from Southern University in Baton Rouge, La. and MBA from Tulane University.

CRAIG W. JOHNSON, CFA, CMT, Piper Sandler

Craig Johnson is a managing director and Chief Market Technician of Piper Sandler’s technical research group. Johnson joined Piper Sandler in 1995 as an analyst in the firm's private client research department. He offers frequent technical commentary on the broader market and individual stocks.

Johnson earned his B.S. degree with an emphasis in finance and marketing and his M.B.A. from Drake University. Johnson holds the Chartered Financial Analyst and Chartered Market Technician designations and is an active member of the Twin Cities Society of Securities Analysts and co-chapter chair of the Minnesota Chapter Market Technician Association. He is also the past President of the Market Technicians Association and leads its Board of Directors.
BEVON JOSEPH, Greenwood Project

Originally from Trinidad & Tobago, Bevon moved to the United States after high school to further his education. He is a graduate of DePaul University.

Bevon’s career has been exclusively in the trading industry, specifically in technology. He’s worked at financial institutions such as JPMorgan, Morgan Stanley, UBS, Chicago Trading Company, PEAK6 Investments, and Achievement Asset Management. Bevon also worked on the trading floors of the NYSE, NYMEX, and AMEX. Mr. Joseph firmly believes that kids can’t be what they can’t see.

There is no lack of talent, only a lack of opportunity.

LAURA MATTIA, PH.D., MBA, CFP®

Owner of a Sarasota based Fee-Only Financial Planning and Investment firm and with over thirty years of finance experience, Laura is a comprehensive financial planner, educator, speaker and author. She is a member of NAPFA and a fiduciary advocate. She believes that all financial advisors should be willing to sign an oath committing to work as a fiduciary 100% of the time.

A former corporate financial executive and thought-leader in the field, Dr. Mattia’s career journey was a circuitous one. After earning a B.S. in psychology with the intention of pursuing a career helping people, she went on to obtain an MBA in accounting and finance, later accepting a position in the corporate world. As she tells it, it was this job that ultimately served as the inspiration for her current area of focus: “I worked for many years as a corporate executive, CFO, and controller and over time recognized that my financial skills could be beneficial for people. So, I went back to school and earned my CFP® designation and later a Ph.D. in financial planning where I was trained to offer advanced financial planning solutions that truly benefit my clients and make me their trusted advisor.”

Though today Dr. Mattia is a visionary financial advisor, educator, author and TEDx speaker, she is involved in the financial planning community on many levels. She teaches future CFP® professionals at Texas Tech University and recently spent several years creating a new CFP® registered program at the University of South Florida.

Dr. Mattia is recognized as an expert in the profession and often speaks at conferences held for financial services firms and associations such as, the national association of financial planners (NAPFA), the financial planning association (FPA) and the financial therapy association (FTA). She is also often quoted in industry periodicals such as the Wall Street Journal and the New York Times and has published numerous articles and academic research in periodicals such as the Journal of Financial Planning and the NAPFA Advisor. She is the author of the book Gender On Wall Street: Uncovering Opportunities For Women In Financial Services, published in June 2018 by Palgrave Macmillan.
AMY PERKINS, President insideARM and the iA Institute

Amy joined the iA institute and insideARM in 2017. Previously, she was Senior Vice President, Head of Strategy and Analytics, Collections & Recovery for Citizens Financial Group.

Prior to Citizens Amy spent eight years with Bank of America in a variety of roles including SVP Card Recovery & Outsourcing; SVP Consumer Business Support Executive; SVP Consumer Collections & Recovery, Business Enablement and Fulfillment; and SVP Consumer Banking Services, Risk Management and Quality Control.

Amy began her career in collections with NCO Group, and was Director of Operations when she left in 2005 after six years with the company.

PATRICK SELLS, NYDIG

Patrick Sells, an award-winning entrepreneur recognized for digital innovation in banking, is on a mission to transform financial services through the fusion of Bitcoin and banking. A deeply held belief of Patrick’s is that the two should be symbiotic in order to create maximum financial security for all. As the Head of NYDIG's Bank Solutions business, Patrick will build upon the momentum from NYDIG’s efforts to bring the needed technological infrastructure for banks to be able to offer Bitcoin products and services such as custody, rewards programs and lending opportunities.

Prior to joining NYDIG, Patrick served as Chief Innovation Officer at Quontic Bank, where he evolved the firm into a leading adaptive digital bank in the U.S. through a focus on technology and innovation. Prior to Quontic, he built and ran several technology, data and digital marketing companies, and has advised banks and fintech companies on regulatory compliance.

In 2020, Patrick was recognized as American Banker’s "Digital Banker of the Year" and one of Independent Community Bankers of America's "40 under 40 Emerging Community Bank Leaders."
SAM STOVALL, CFP®  Chief Investment Strategist As Chief Investment Strategist, Sam Stovall serves as analyst, publisher, and communicator of CFRA’s outlooks for the economy, market, and sectors. He is the author of The Seven Rules of Wall Street and writes weekly “Sector Watch” and “Investment Policy” reports on CFRA’s MarketScope Advisor platform, as well as maintains the Industry Momentum and Seasonal Rotation portfolios. His work is also found in CFRA’s flagship weekly newsletter The Outlook.

Prior to joining CFRA, Sam was Managing Director and Chief Investment Strategist at S&P Global for more than 27 years and served as Editor-in-Chief at Argus Research, an independent investment research firm in New York City.

He received an M.B.A. in Finance from New York University and a B.A. in History/Education from Muhlenberg College, in Allentown, Pa. Sam is also a Certified Financial Planner.

Sam’s volunteer efforts center on financial literacy. He is a board member of WISE (Working in Support of Education), an educational not-for-profit that aims to improve the lives of young people through programs that develop financial literacy and readiness for college and careers. He is also a Trustee of Muhlenberg College. Contact Sam: sam.stovall@cfraresearch.com Follow Sam on Twitter: @StovallCFRA

DEREK WHITE, Vice President, Global Financial Services, Google Cloud

Derek White is the Vice President of Global Financial Services at Google Cloud. He is responsible for setting the go-to-market strategy and partnering with banks, insurance companies and other financial services entities to transform and help redefine their core businesses into state of the art digital operations, while also creating new solutions, products, and capabilities.

Derek is a technology and innovation leader, bringing with him more than 20 years of experience in transforming financial services. Prior to Google Cloud, he served as the chief digital officer for U.S. Bank, and earlier in his career, Derek was the global head of client solutions for BBVA. Derek also held several leadership roles at Barclays, including chief design and digital officer. He was also the technology ambassador for London, actively promoting the UK market as a fintech capital.

He earned a master’s of business administration degree from the University of Pennsylvania -- The Wharton School, and holds a bachelor’s of arts degree from Utah State University. Derek enjoys exploring nature with his wife and their four children.