

TO INFINITY & BEYOND

2022 ISFFA National Conference
at the DISNEYLAND® Resort™

DISNEYLAND HOTEL

1150 Magic Way Anaheim, California

JUL 31

ISFFA
AWARDS GALA
6PM-9PM

AUG 1

ISFFA DAY
OF LEARNING
9AM-6:30PM

AUG 2

ISFFA DAY
AT DISNEYLAND
8AM - CLOSING



INTERNATIONAL SOCIETY OF FILIPINOS

ISFFA

IN FINANCE AND ACCOUNTING

www.isffa.org

Registration Deadline:



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Welcome Remarks from the National Executive Board Chair

Mabuhay! We are thrilled to welcome you to the 2022 ISFFA National Conference at The Disneyland Resort. After four long years, we are grateful for the opportunity to finally gather and celebrate our fellow Filipinos in finance and accounting! The last few years have been challenging for our ISFFA family with the unprecedented pandemic felt by all. Together, we continue to bravely press forward into the future, leaning on and uplifting one another to our highest professional aspirations. This has led to the Disney-Pixar inspired theme of our national conference: To Infinity and Beyond!



We have arranged a 3-day powerhouse program for the 2022 ISFFA National Conference. Festivities begin on Sunday evening with our ISFFA Gala where we celebrate the accomplishments of our ISFFA officers, recognize outstanding emerging and experienced Filipino leaders and award AICPA scholarships to exceptional students. We're also very grateful to have the esteemed Philippine Consul General Edgar Badajos as our ISFFA Gala keynote speaker.

Continuing with our theme, To Infinity and Beyond, the program on Monday morning kicks off with motivational speaker, Jessica Cox, the first armless pilot in aviation history! Born without arms, Jessica is an inspiration to all in conquering physical barriers to achieve the seemingly impossible. We have also curated incredible Filipino subject matter experts and leaders in finance and accounting. Learn from our ISFFA panelists on how they achieved success and significance in their careers, the latest emerging updates in audit, tax, advisory, personal finance and cybersecurity, and how we can increase Filipino representation on Boards. We'll close out the day with an incredible session led by Charina Amunategui, "From Fears to Fierce – A Masterclass on Personal Branding and Self Advocacy," followed by a networking reception with ISFFA colleagues.

On Tuesday, bring your friends and family to spend the day at the happiest place on earth as we conclude the conference with an ISFFA Day at Disneyland! The 2022 National ISFFA Conference is sure to inspire, strengthen and spread joy!

Thank you for supporting ISFFA and our four pillars of leadership, mentorship, scholarship and community service (#ISFFACares). Maraming salamat to all who volunteered their time and talents in making all the 2022 ISFFA National Conference festivities possible. My personal hope is that you will feel the warmth of your ISFFA colleagues, leave inspired to achieve your highest aspirations and utilize your successes to elevate our Filipino community.

Warm regards,

Kathy Lai, Chair

ISFFA National Executive Board
2022 National Conference Planning Committee





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Learn more at crowe.com or contact Kathy Lai at +1 714 668 5376, kathy.lai@crowe.com.



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2022 ISFFA NATIONAL CONFERENCE

Program Schedule

JUL 31
SUNDAY

6:00 PM



The Gala | Registration & Cocktail Hour

📍 Magic Kingdom Foyer – Starts from 6:00 PM – 7:00 PM

7:00 PM



The Gala | Dinner and Awards

📍 Magic Kingdom Ballroom 2 & 3 – Starts from 7:00 PM – 9:00 PM

Welcome Remarks and Keynote Speaker

- Kathy Lai, ISFFA Chair of the National Board and 2022 National Conference
- Consul General Edgar Badajos

Recognition Awards

- 2018–2022 ISFFA National Board and Officers Recognition
- Oath Taking – ISFFA National Board and Officers
- Awarding of AICPA/ISFFA Scholarship (Joy Mayor, ISFFA National Board Member)
- ISFFA Chicago – Floresca CPA Review Scholarship Program (Arvin Floresca, ISFFA National Board Member)
- 2022 ISFFA Recognition Awards (Edith Winterhalter, Benel Se-Liban, Maria Fides Balita, ISFFA Advisors)

AUG 1
MONDAY

8:00 AM

Registration

📍 Magic Kingdom Foyer

9:00 AM

Welcome Remarks and Keynote Speaker

Possible Thinking – Achieve the Impossible

- Kathy Lai, ISFFA Chair of the National Board and 2022 National Conference
- Jessica Cox, First Armless Pilot in Aviation History "Guinness World Record Medal"

📍 General Session 1: Magic Kingdom Ballroom 2 & 3

Program Schedule

AUG 1
MONDAY

9:50 AM

Break

10:00 AM

Audit, Tax and Transaction Advisory Updates

Overview and discussion of recent and upcoming audit, tax and transaction advisory updates and trends.

- Speaker 1: Marian de Guzman, Director, PwC
- Speaker 2: Damaris Perez, Partner, Crowe LLP
- Speaker 3: Beverly Ilagan, Senior Manager, EY
- Moderator: Gilda Priebe, Partner, Adelfia LLC

📍 General Session 2: Magic Kingdom Ballroom 2 & 3

11:20 AM

Break

11:30 AM

Partner Track – Be the Driver of Your Career

Mentoring about choosing a career in public accounting, Big4, or from a regional or small firm combination of those who migrated to the US, born in the US.

- Speaker 1: Joseph Cruz, Partner, EY
- Speaker 2: Malve Ildefonso, Partner, BDO
- Speaker 3: Angel Naval, Partner, MGO
- Speaker 4: Stella Marie Santos, Managing Partner, Adelfia LLC
- Moderator: Dexter Jumamoy, Senior Manager, BDO USA, LLP

📍 Breakout 1A : Magic Kingdom Ballroom 1

Program Schedule

AUG 1
MONDAY

11:30 AM

A Magical Journey to Finance Leadership

Mentoring about choosing a career in finance; life after public, careers in investment advisory, internal audit, controller, government, industry.

- Speaker 1: Bernadette Robertson, Controller, MWD (Utilities)
- Speaker 2: Joy Mayor, Controller, LAUSD (Education)
- Speaker 3: Diana Estrada, Deputy Executive Officer of Finance LA Metro (Transportation)
- Moderator: Nicole Mendoza-Patel, Tax Director, Global Tax Management

📍 Breakout 1B – Magic Kingdom Ballroom 4

12:30 PM

Lunch: Adventure Lawn

1:30 PM

From Success to Significance

Learn from our speakers' success stories throughout their journey and other areas they are passionate about.

- Speaker 1: Jennifer Cabalquinto, CFO, 2K
- Speaker 2: Benel Se Liban, Managing Partner, JBC Group LLC
- Speaker 3: Karen Cabrera Modena, Member – Board of Advisors, Georgetown University McDonough School of Business, former EY Partner
- Speaker 4: Camela Wisel, Vice President, Chief Accounting Officer and Controller, The Chemours Company
- Moderator: Arvin Floresca, Vice President of Internal Audit (CAE), MultiPlan

📍 General Session 3 – Magic Kingdom Ballroom 2 & 3

2:20 PM

Break

Program Schedule

AUG 1
MONDAY

2:30 PM

Cybersecurity Breaches in Finance

This session will focus on the most critical issues facing security and finance leader in 2022. You will learn about the trends on how to work collaboratively to manage cybersecurity risk.

- Speaker 1: Ralph Villanueva, IT Security and Compliance Analyst, Hilton Grand Vacations
- Speaker 2: Maria Cecilia Pineda, Cybersecurity Risk Advisor - Southern California Edison
- Speaker 3: Cecil Pineda, Senior Vice President & Chief Information Security Officer, RI RCM, Inc.
- Moderator: Diana Estrada, Deputy Executive, Officer of Finance LA Metro

📍 Breakout 2A - Magic Kingdom Ballroom 1

2:30 PM

Wealth Building: Post-Pandemic

Learn basic wealth management strategies, products, statistics and new trends in building wealth and financial security, post pandemic.

- Speaker 1: Maria Fides Balita, Registered Representative, Transamerica Financial Advisors, Inc.
- Speaker 2: JP Ferrer, Senior Vice President, Morgan Stanley
- Speaker 3: Markus De Jesus, Regional Vice President, Equitable Advisors
- Moderator: Malve Ildelfonso, Partner, BDO

📍 Breakout 2B - Magic Kingdom Ballroom 4

3:20 PM

Break

3:30 PM

Building an Entrepreneurial Mindset

Learn from our speakers' success stories; takeaway tips and advice on how to build an entrepreneurial mindset.

- Speaker 1: Danica Jacinto, VP of Finance and Operations of No. 8 Inc.
- Speaker 2: Daniel Galeon, Head of Risk Governance, Product Risk, Stripe
- Speaker 3: Winston Damarillo, Chief Executive Officer, Tarino Venture Labs
- Moderator: Kevin Suarez, Executive VP, ISFFA San Francisco Chapter

📍 Breakout 3A - Magic Kingdom Ballroom 1

Program Schedule

AUG 1
MONDAY

3:30 PM

Filipino Representation on Boards

Sharing of experiences on giving back and how to leverage your relationships and network to be on Boards of companies or non-profit organizations.

- Speaker 1: Genevieve Jopanda, Chief of Staff, California State Treasurer's Office
- Speaker 2: Miguel Sangalang, Executive Director and General Manager, City of Los Angeles Bureau of Street Lighting
- Speaker 3: Mary Tee, Vice President and Controller, Princess Cruises
- Moderator: Liezl Malabanan, Senior Manager, KPMG

📍 Breakout 3B - Magic Kingdom Ballroom 4

4:20 PM

Break

4:30 PM

"From Fears to Fierce" – A MasterClass on Personal Branding and Self Advocacy by Charina Amunategui

You will learn how to:

- Cultivate a memorable and impactful personal brand as a Filipino professional in the competitive world of Finance and Accounting
- Lean into your fears and roadblocks and use them for insight to power your next move
- Advance your career, increase your circle of influence, and have a larger impact
- Help build our community and our legacy "to infinity and beyond"

By the end of this session, you will be armed with action points and energized to take next steps to ensure everyone gets to know WHO you are, WHAT you stand for and what YOU are capable of.

- Charina Amunategui, Executive Director, MUFG Investor Services
- Moderator: Kathy Lai, Partner, Crowe

📍 General Session 4: Magic Kingdom Ballroom 2 & 3

Program Schedule

AUG 1
MONDAY

5:30 PM

Networking Reception

📍 Magic Kingdom Foyer - Starts from 5:30 PM - 6:30 PM

AUG 2
TUESDAY

8:00 AM



ISFFA Day At Disneyland!

Exclusive discounted theme park tickets for ISFFA Conference attendees are available for [purchase on-line here](#).

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of Filipinos in Finance and Accounting



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empower the leaders of tomorrow
to build a better future**

**Congratulations on 16 years of success
and cheers to many more!**

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2022 ISFFA NATIONAL CONFERENCE

Speakers

Keynote Speakers



EDGAR BADAJOS

- PHILIPPINE CONSULATE GENERAL
- KEYNOTE SPEAKER AT THE GALA AND AWARDS NIGHT

Consul General Edgar Badajos assumed his post as Consul General of the Philippine Consulate General in Los Angeles on 06 April 2021. Consul General Badajos first joined the Philippine Department of Foreign Affairs (DFA) in 1997. In the DFA, he has held various positions of responsibility including, most recently, as Director of the Political and Security Division of the Office of ASEAN Affairs. Immediately prior to his posting to Los Angeles, Consul General Badajos served as Consul General at the Philippine Consulate General in Jeddah, Kingdom of Saudi Arabia. His other previous foreign assignments include the Philippine Consulate General in Toronto from 2000 to 2003, the Philippine Consulate General in New York from 2003 to 2007, and the Philippine Embassy in Bangkok, Thailand from 2009 to 2015. Consul General Badajos is a graduate of the U.P. College of Law. He also holds a Bachelor of Arts from the University of the Philippines in Baguio.



JESSICA COX

- KEYNOTE SPEAKER - POSSIBLE THINKING - ACHIEVE THE IMPOSSIBLE
- JESSICA COX MOTIVATIONAL SERVICES, MOTIVATIONAL SPEAKER AND LIFE COACH

Jessica is best known for becoming the first armless pilot in aviation history. Her achievement earned her a Guinness World Record medal, invitations from six continents, and featured on tv programs like Ellen, Inside Edition, Fox and Friends, Oprah Winfrey Network, CNN, CBS Evening News, and the BBC.

Jessica is recognized internationally as an inspirational keynote speaker. Born without arms, Jessica now flies airplanes, drives cars, and otherwise lives a normal life using her feet as others use their hands. She holds the title of the first person without arms to earn a black belt in ATA Martial Arts and the Guinness World Record for being the first armless person in aviation history to earn a pilot's certificate. Convinced that the way we think has a greater impact on our lives than our physical constraints, Jessica chose to pursue a degree in psychology at the University of Arizona. Since then she has traveled to 26 countries on six continents sharing her inspirational message.

Born in 1983 in Sierra Vista, Arizona, Jessica has learned to live her life with her feet. There were many questions at the time about whether Jessica would be able to live a "normal" life. However, Jessica's father has said he never shed a tear about her birth condition. He had full confidence in her potential. With the support of her parents and family, Jessica became confident in herself as an adult and continued to explore the world with her feet.

Jessica's most famous accomplishment was learning how to fly. It took three states, four airplanes, three flight instructors, and three years to find the right aircraft: a 1946 415C Ercoupe Airplane. In 2008 Jessica earned her Light Sport Pilot Certificate. She received the Guinness World Record for being the first person certified to fly an airplane with only their feet in 2011. In May 2012, Jessica married in the beautiful city of South Pasadena, CA. In the fall of that same year, Jessica became a Goodwill Ambassador for Humanity and Inclusion, a Nobel Peace Prize winning NGO, and advocated for disability rights in Ethiopia, the Philippines, Nepal, and the US Senate.

Speakers



KATHY LAI

- PARTNER, CROWE LLP
- ISFFA CONFERENCE MASTER OF CEREMONIES
- ISFFA NATIONAL EXECUTIVE BOARD (NEB) CHAIR
- ISFFA MODERATOR, A MASTERCLASS ON PERSONAL BRANDING AND SELF-ADVOCACY

Kathy is a highly accomplished licensed CPA and CGMA public accounting professional of diverse experience derived from providing assurance services to large, complex state and local governmental entities, higher education institutions, school districts, transportation, utilities and not-for-profit organizations. With over 20 years of experience in public accounting, Ms. Lai has led the audits of some of the largest governments in California. Among 400,000 CPA's nationwide, Kathy served on a select AICPA national 15-member State and Local Government Expert Panel. Through her participation with the AICPA, she has been accredited with contributions to authoring the AICPA State and Local Government Audit Guide, including the newest Pension Chapter to address the complex GASB pension standards, compiling AICPA comment letters to GASB on emerging standards and presenting webcasts for the AICPA Governmental Audit Quality Center. Other examples of Kathy's thought leadership includes presenting to over 1,000 Californians on the complexities of the Uniform Guidance and emerging GASB pronouncements through her involvement with the California Society of Municipal Finance Officers (CSMFO), National Grants Management Association (NGMA) and tailored client trainings.



JOY MAYOR

- CONTROLLER, LOS ANGELES UNIFIED SCHOOL DISTRICT
- ISFFA SPEAKER, A MAGICAL JOURNEY TO FINANCE LEADERSHIP
- ISFFA NEB MEMBER

Joy Mayor is currently the Controller of Los Angeles Unified School District (LAUSD), the 2nd largest school district in the United States. Prior to joining LAUSD, she has over 10 years of combined audit experience working at KPMG both in the U.S and in the Philippines. Her audit industry experience includes manufacturing, finance, higher education, non-profit and local agencies. She is a graduate of Bicol University and a licensed CPA both in the Philippines and California.



ARVIN FLORESCA

- VICE PRESIDENT OF INTERNAL AUDIT (CAE), MULTIPLAN
- ISFFA CHICAGO-FLORESCA CPA REVIEW SCHOLARSHIP PROGRAM
- ISFFA MODERATOR, FROM SUCCESS TO SIGNIFICANCE
- ISFFA NATIONAL EXECUTIVE MEMBER AND PAST PRESIDENT OF CHICAGO CHAPTER

Arvin Floresca is the Vice President of Internal Audit (Chief Audit Executive) of MultiPlan, a publicly-listed company that helps clients, including all 10 of the nation's top 10 healthcare payors, manage their health plans through a number of innovative healthcare cost management solutions that emphasize fairness, a legacy of strong provider relationships, efficiency and affordability. Arvin is a Certified Public Accountant, a Certified Internal Auditor, a Certified Information Systems Auditor, and a Certified Global Management Accountant. He also received his Certification in Risk Management Assurance. His areas of expertise are in Internal Auditing, SOX Compliance, Accounting Policies & Procedures, Enterprise Risk Management, and Business Process Audits. Arvin previously held global leadership positions in the areas of SOX Compliance and Accounting. He was a Manager of Enterprise Risk Services at Deloitte. He started his career as an external auditor at SGV & Co. (then Arthur Andersen Philippines). He is an active member of the AICPA, the IIA and ISACA. He was an Assistant Professor at the Northern Illinois University - teaching Certified Internal Auditor (CIA) Examination Review Course and a National Facilitator for the IIA seminars. In 2017, he established the ISFFA Chicago - Floresca CPA Review Scholarship which provides funding for deserving accounting students to attend a review school paving their way to become CPAs. Arvin is a Hall of Fame awardee for Excellence in Finance and Accounting in 2019 by the Via Times, the only ethnic print/broadcast combo media founded and managed by a woman in North America. Arvin received his Bachelor of Science in Accountancy from De La Salle University in the Philippines. He is a proud husband to Gayle, also a distinguished CPA, and a proud dad to Nina, Enzo and Alyssa.

Speakers



BENEL SE-LIBAN

- MANAGING DIRECTOR,
- 2022 ISFFA RECOGNITION AWARD COMMITTEE AND PRESENTER
- ISFFA SPEAKER, FROM SUCCESS TO SIGNIFICANCE
- ISFFA FOUNDER, ADVISOR AND PAST NEB CHAIR

Benel Se-Liban is the Managing Partner of JBC Group, LLC a full service minority and women-owned business consulting firm whose partners have provided more than 25 years of unparalleled commitment to customer satisfaction in the resource efficiency, business consulting, cleantech, sustainability, and human capital fields. Benel is a CPA and with over 25 years of experience in audit, tax, accounting, financial planning and consulting services. Benel is one of the pioneering leaders in the Los Angeles Filipino-American community. She is the Founding President of the International Society of Filipinos in Finance and Accounting (ISFFA, <http://isffa.org/>) whose mission is to assist, educate, train and mentor emerging professionals, both domestically as well as globally. ISFFA has transformed the fundamental fabric of similar organizations by focusing on soft skills development, business and network skills training, and development of younger and emerging leaders. She participated as committee member for various fundraising Filipino American nonprofit organizations such as Filipino American Symphony Orchestra, Phildev, Filipina Women Network and Kalayaan Inc. She is currently the Secretary and Board Member of Life Steps Foundation (www.lifestepsfoundation.org) dedicated to meeting the health, psychological and socioeconomic challenges of people throughout their lifespan who are experiencing mental, developmental or physical disabilities. She is currently a Board Member of Foundation of Filipina Women Network (FFWN), (filipinawomensnetwork.org) "is an organization for career women of Philippine ancestry and mission is to help Filipina women achieve previously unimaginable levels of performance in the public and private sectors. She was a former Audit Chair and Board Member of St. John's Well Child Family Center (<http://www.wellchild.org/>) whose mission is to eliminate health disparities and foster community well-being by providing and promoting the highest quality care in South Los Angeles. She is a active member of National Business Women Owner and Women of City Club LA Committee. She has been recently appointed as an Ambassador for City Club LA. She is also an active member of American Society of Certified Public Accountant. Her recognition includes as 2011 award recipient of the 100 Most Influential Filipina Women given by the Filipina Women's Network; 2012 Women Making A Difference Nominee given by Los Angeles Business Journal; and 100 Outstanding Agnesians Awardee given by St. Agnes Academy during its 2012 Centennial Celebration. Benel is a proud wife and mother.



EDITH WINTERHALTER

- ASSOCIATE VICE PRESIDENT FOR BUDGET AND STRATEGIC BUSINESS OPERATIONS CALIFORNIA STATE UNIVERSITY NORTHRIDGE
- ISFFA 2022 RECOGNITION AWARD COMMITTEE AND PRESENTER
- ISFFA ADVISOR AND PAST NEB CHAIR

Dr. Edith Winterhalter is the Associate Vice President for Budget and Strategic Business Operations at California State University, Northridge, where she functions as the chief budget officer for the University and the lead administrator for strategic business initiatives involving Campus general fund operations, as well as Campus auxiliary and enterprise organizations. In addition, she oversees enterprise risk management and insurance services for the campus, provides leadership and oversight of budget development and management for the division of Administration and Finance, and facilitates efficient campus wide business service delivery in partnership with fellow associate vice presidents and directors within the Administration and Finance division.

Speakers



MARIA FIDES BALITA

- REGISTERED REPRESENTATIVE, TRANSAMERICA FINANCIAL ADVISORS
- ISFFA SPEAKER, WEALTH BUILDING: POST-PANDEMIC
- ISFFA ADVISOR AND PAST NEB CHAIR

Maria Fides Balita is a Registered Representative of Transamerica Financial Advisors, Inc.. Maria recently retired as partner at Adelfia LLC, a women and minority owned firm in Chicago, Illinois, where she provided audit services to clients in the government, gaming, transit, housing authority, university, 401k/403b, pensions, and not-for-profit industries. Maria served as Chair of National Executive Board of the International Society of Filipinos in Finance and Accounting and now serves on the Advisory Board. In her new endeavor as financial professional, she aims to pursue another passion, to guide and educate families and individuals, about financial independence, particularly in the areas of helping prepare for retirement and protecting their assets.



GILDA PRIEBE

- PARTNER, ADELFA LLC
- ISFFA MODERATOR, AUDIT, TAX AND TRANSACTION ADVISORY UPDATES
- ISFFA NEB SECRETARY

Gilda Belmonte-Priebe, CPA, CIA, CFE, CGMA is a Partner at Adelfia LLC, a Chicago based Filipino and women-owned Certified Public Accounting firm. Gilda has over 20 years of financial audit, single audit, and compliance examination experience. Prior to joining Adelfia LLC, she was a partner in a local accounting firm based in Chicago. Prior to that, she had six years of combined audit experience as an assistant manager at PWC-Singapore and as a senior auditor at SGV (Manila, Philippines) (member firm of Ernst & Young Global). Gilda graduated Magna Cum Laude from Aquinas University of Legazpi in the Philippines (now University of Santo Tomas - Legazpi) with a degree in Bachelor of Science in Accountancy. She is a Certified Public Accountant both in USA (Illinois and California) and the Philippines, a Certified Internal Auditor, a Certified Fraud Examiner, and a Certified Global Management Accountant. Gilda is a member of the American Institute of Certified Public Accountants, Institute of Internal Auditors, Association of Certified Fraud Examiners, and Illinois CPA Society. She is a peer reviewer under the AICPA Peer Review Program and currently a member of the Illinois CPA Society Peer Review Committee. She has extensive knowledge of State and local government agencies, universities, manufacturing, real estate, non-profits, privately held companies, and Medicaid Integrity programs having audit engagements performed on these entities. She also performed agreed-upon procedures, peer reviews, and other operational audits.



MARIAN DE GUZMAN

- DIRECTOR, PWC
- ISFFA SPEAKER, AUDIT, TAX AND TRANSACTION ADVISORY UPDATES
- ISFFA EXECUTIVE VICE PRESIDENT, CHICAGO CHAPTER

Marian is a Director based in the Chicago office of PwC with 10+ years of experience in providing assurance services to clients within the Pharmaceutical and Life Sciences, Health Services, Media and Entertainment and Industrial Products Sectors. She has international experience, working in different PwC offices during her career. Marian currently serves as the engagement director for public and private company engagements. As part of her role, Marian is directly involved in overseeing the audit work of multiple local and international teams. She provides guidance and expertise to professional staff and clients, and participates in the performance of audit procedures, with particular focus on complex and specialized accounting matters.

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The diverse and dedicated professionals at BDO recognize the **International Society of Filipinos in Finance and Accounting** for the opportunities it creates and the relationships it builds for Filipino professionals and the entire business community.

Malve Ildefonso, Audit Partner
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Speakers



DAMARIS PEREZ

- PARTNER, CROWE LLP
- ISFFA SPEAKER, AUDIT, TAX AND TRANSACTION ADVISORY UPDATES

Damaris is a Tax Partner with Crowe LLP. She also serves as a Member of the Board of Directors for the Sacramento Estate Planning Council and is also the Chairwoman of the Board for the Sacramento Asian Pacific Chamber of Commerce. Her other memberships include: Audit Committee Member for the Placer Community Foundation; Steering Committee Member of the Philanthropic Advisers Forum; Member of the American Institute of Certified Public Accountants; and Member of the California Society of Certified Public Accountants.



BEVERLY ILAGAN

- SENIOR MANAGER, FINANCIAL ACCOUNTING ADVISORY SERVICES, ERST & YOUNG LLP
- ISFFA SPEAKER, AUDIT, TAX AND TRANSACTION ADVISORY UPDATES

Beverly Ilagan is a Senior Manager in Ernst & Young's Financial Accounting Advisory Services practice. She has public accounting and private industry experience in the financial services industry in the U.S., Australia and Asia. Beverly is a CPA licensed in CA and earned her MBA (with honors) at the UCLA Anderson School of Management with focus in Finance, Entrepreneurship and Global Management. Beverly has assisted companies in their public company journey whether through traditional IPO or in SPAC transactions. Beverly assisted in drafting uplifted financial statements, Management Discussion and Analysis and accounting memos on complex accounting matters. Beverly also assisted in understanding companies' current capabilities around people, process and technology and provided actionable recommendations and roadmap to a desired future state. Beverly leads efforts in understanding impact of SEC Proposed Rules to financial services clients such as around ESG disclosures and assist clients in developing target operating model in preparation for the rules' finalization and its implementation, including developing process and controls, policies and procedures, when the rules are finalized. Prior to re-joining EY, Beverly has led strategic enterprise-wide projects, including developing a business case and as lead project manager reporting to Executive Management and Steering Committee on refresh of ICFR program, as Subject Matter Advisor for the design, build and implementation of an Integrated Risk Platform and as a change management practitioner.



DEXTER JUMAMOY

- SENIOR MANAGER, BDO USA, LLP
- ISFFA MODERATOR, PARTNER TRACK - BE THE DRIVER OF YOUR CAREER
- ISFFA PRESIDENT, SOCAL CHAPTER

Dexter is a senior manager with BDO's Risk Advisory Services with over 15 years of experience in accounting and finance, enterprise risk assessment, internal audit and SOX, compliance program assessments, HIPAA privacy, and financial compliance support to clients in manufacturing & distribution, technology, health care, higher education, construction, non-for-profit organizations and publicly listed companies. Dexter has managed outsourced or co-sourced internal audit departments, assisted companies with IPO/De-SPAC SOX readiness, assessed and advised organization's policies and procedures, and compliance program effectiveness. He has assisted various companies and organizations by advising them on enhancements to their financial and operational policies, processes, internal controls, and systems. Prior to BDO, he was with Moss Adams' Consulting practice and was a manager of internal audit for a Fortune 500 healthcare company, where he was responsible for conducting internal audit and the company's yearly SOX compliance efforts including risk assessment, control design and effectiveness testing, and validation of management reports.

Speakers



JOSEPH CRUZ

- PARTNER, E&Y LLP
- ISFFA SPEAKER, PARTNER TRACK - BE THE DRIVER OF YOUR CAREER

I am a tax partner based in Irvine serving privately held companies to fortune 500 companies throughout the United States over several industries. I have over 20 years of international tax experience helping companies with tax strategy, compliance and controversy. My experiences includes assisting multi-national companies align and transform their global tax footprint to their business operating model, cross-border intangible property planning, global cash deployment, and direct and indirect tax compliance and reporting. Further, I have a significant amount of experience helping private shareholders (individuals and PE owners) develop their tax strategy with respect to their international holdings. I serve a broad range of industries and have served clients from coast to coast. In addition to serving clients, I hold several leadership positions. As the Tax practice leader for the Irvine and San Diego offices, I'm responsible for driving growth, managing resources, developing people and providing exceptional client service across the the two offices. I am also responsible for campus hiring including our DE&I recruiting programs for our Irvine tax practice. Passionate about DE&I and leadership development, I am the EY Americas Pan Asian Professional Network Leader, and a member of the EY Americas Professional Network Council and EY Americas Anti-Racism Advisory Council member. These internal organizations set strategy and advise on policy for our firm at the national level regarding DE&I.



MALVE ILDEFONSO

- PARTNER, BDO USA, LLP
- ISFFA SPEAKER, PARTNER TRACK - BE THE DRIVER OF YOUR CAREER
- ISFFA MODERATOR, WEALTH BUILDING: POST-PANDEMIC
- ISFFA NEB EXECUTIVE VICE PRESIDENT

Malve is an assurance Partner in BDO's Asset Management practice, where she serves as engagement leader and business advisor for alternative investment fund managers. Malve has over 19 years of professional experience in both public accounting and industry, in Philadelphia, Southern California, and the Bay area. Malve's experience includes leading audit engagement teams in serving clients across a broad spectrum of public and private companies in the asset management industry, including Section 404 attestation for public advisors, registered funds, private equity funds, fund of funds, broker dealer, and employee benefit plans. Malve's technical expertise includes ASC 820 Fair Value topic, ASC 946 Financial Statement Disclosures, Regulation S-X, and audit of internal control over financial reporting. Malve also brings a different perspective from her management and oversight role over the financial reporting end-to-end process including the review of filings with the Securities and Exchange Commission for a large registered mutual fund complex. Malve has a proven track record in executing highest quality audits and is passionate in managing and coaching her team including women and minorities to deliver exceptional client service.



ANGELICA FRANCISCO-NAVAL

- PARTNER, MGO LLP
- ISFFA SPEAKER, PARTNER TRACK - BE THE DRIVER OF YOUR CAREER

Angel is a Financial Accounting and Advisory Services partner in MGO's Los Angeles office. With deep experience in U.S. GAAP and IFRS, corporate finance and financial planning, she advises and helps businesses ranging from early-stage startup to well established companies in a wide range of industries, including cannabis, technology, media and entertainment, nonprofit, retail, and manufacturing. She oversees MGO's FAAS West Coast practice, proving instrumental in refining its internal processes. Angel has more than 14 years of combined audit, advisory and client accounting services to public and privately held companies. She's also been involved in business process and SOX control reviews, new standards implementation for revenue recognition and leases, accounting systems implementation, due diligence, M&A, and IPO engagements. Currently, she is building the firm's market brand awareness to Filipino decision makers in the public and private practices. Prior to joining MGO, Angel worked at a top 10 accounting firm performing SEC and privately held company audits out of their Los Angeles office. She was recently recognized by the Los Angeles Business Journal as one of the Minorities of Influence in the CPA category. She is a Certified Public Accountant, Certified Internal Auditor and Certified Information Systems Auditor exam passer.

Speakers



STELLA MARIE SANTOS

- MANAGING PARTNER, ADELFA LLC
- ISFFA SPEAKER, PARTNER TRACK - BE THE DRIVER OF YOUR CAREER

Stella Marie B. Santos is the Managing Partner and Founding Member of Adelfia LLC. Adelfia LLC was established on 11/11/11 and is a public accounting firm proud to be owned by Filipino women. Adelfia LLC provides assurance, advisory, accounting, tax, information technology review/audit services. Under Stella's leadership, the firm has grown from 3 founders to a 5 partner firm and has employed 86 employees through out the years. She started her career at SyCip, Gorres, Velayo & Co. (Manila, Philippines) (member firm of Ernst & Young). She also worked at a local CPA firm in Chicago in October 1993, and became a Partner in January 2003. She has over 35 years of experience in serving tax and audit clients in the fields of financial, compliance and operational audits, management and financial accounting. Stella graduated Cum Laude from the University of the Philippines with a degree in Bachelor of Science in Business Administration and Accountancy. She is a Certified Public Accountant both in the Philippines and in Illinois, USA. She ranked 12th place in the Philippine CPA examination. Her contributions to the finance and accounting profession are highly recognized with these awards: - 2014 Circle of Empowered Women by the National Federation of Filipino American Associations (NaFFAA) Illinois Chapter, and - 2014 National Council of Philippine American Canadian Accountants (NCPACA) - 2015 Chicago Filipino Asian American Hall of Fame for Excellence in Finance/Accounting - 2017 Lester H. McKeever Jr. Outstanding Leader in Advancing Diversity Award from the Illinois CPA Society



NICOLE MENDOZA-PATEL

- TAX DIRECTOR, GLOBAL TAX MANAGEMENT
- ISFFA MODERATOR, A MAGICAL JOURNEY TO FINANCE LEADERSHIP
- ISFFA PAST NEW YORK CHAPTER PRESIDENT

Nicole is a Tax Director at AbbVie. She has 15 years of experience and started her career at PwC. Her main responsibilities include overseeing the Federal and State income tax compliance function. She has her BS in Accounting and BA in Art History from Rutgers University. She also has her Masters in Tax from Seton Hall University.



BERNADETTE ROBERTSON

- CONTROLLER, METROPOLITAN WATER DISTRICT OF SOUTHERN CALIFORNIA
- ISFFA SPEAKER, A MAGICAL JOURNEY TO FINANCE LEADERSHIP

With approximately 30 years of experience, Bernadette is the first female Controller at Metropolitan Water District of Southern California (Metropolitan). Metropolitan is the largest water district in the United States, developing, storing and distributing water, at wholesale, to its 26 member public agencies for domestic and municipal purposes. Metropolitan's service area comprises approximately 5,200 square miles and includes portions of the six counties of Los Angeles, Orange, Riverside, San Bernardino, San Diego and Ventura. Bernadette manages an annual operating budget of nearly \$2 billion, making forward-thinking investments in water supplies, storage, conservation and treatment, and responsibly maintaining existing infrastructure.

Speakers



DIANA ESTRADA

- DEPUTY EXECUTIVE OFFICER OF FINANCE, LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY
- ISFFA SPEAKER, A MAGICAL JOURNEY TO FINANCE LEADERSHIP
- ISFFA MODERATOR, CYBERSECURITY BREACHES IN FINANCE
- ISFFA NEB MEMBER

Diana Estrada is the Deputy Executive Officer, Finance of the Los Angeles County Metropolitan Transportation Authority (LA Metro). LA Metro has a budget of 7.2 Billion and is unique among the nation's transportation agencies. It serves as transportation planner and coordinator, designer, builder and operator for one of the country's largest, most populous counties. More than 9.6 million people – nearly one-third of California's residents – live, work, and play within its 1,433-square-mile service area." LA Metro is responsible for the continuous improvement of an efficient and effective transportation system for Los Angeles County. Diana is a Certified Internal Auditor, Certified Fraud Examiner and holds a B.S. in Accounting from Saint Paul College, Q.C., Philippines



JENNIFER CABALQUINTO

- CFO, 2K
- ISFFA SPEAKER, FROM SUCCESS TO SIGNIFICANCE

Jennifer Cabalquinto is a strategic, business-centric CFO and board member who provides key financial insights from 25+ years of experience establishing the foundation that enables enterprises to thrive. She has built, led, and optimized corporate finance functions within startup, turnaround, and rapid-growth companies, including Golden State Warriors Sports LLC, NBC Universal, Telemundo, and Legal Solutions Holdings LLC. Currently, she is CFO at 2K, a global developer and publisher of interactive entertainment for video game consoles, PC, and mobile devices. As CFO, responsible for the setting, directing and execution of financial policies and business strategies. Additionally, serves as a key interface between the leadership team at 2K and the parent company, Take-Two Interactive Software, Inc. (NASDAQ: TTWO). As CFO of Golden State Warriors Sports LLC, Jennifer was entrusted to build and lead day-to-day and long-term financial planning, accounting, and treasury operations for this multi-billion-dollar company that includes the Golden State Warriors basketball team and other subsidiaries including GSW Real Estate, GSW Ventures and Chase Center entities. She established the finance and operational infrastructure to support GSW's 12X+ enterprise value growth, in collaboration with ownership and executive team in developing and directing business strategy to monetize team success. Jennifer orchestrated the financing for the construction of a \$2B+ mixed-use development project including Chase Center, the first 100% privately financed arena in San Francisco. She also delivered over 20% compounded annual revenue growth over 6 years through strategic pricing decisions. Jennifer was retained as a Special Advisor by the holding company with interest in GSW (NBA franchise), Chase Center Arena, real estate development projects, eSports teams and other ventures. She supported the organization through a transitional period, advising ownership on financing transactions and special initiatives.



KAREN MODENA

- MEMBER - BOARD OF ADVISORS, GEORGETOWN UNIVERSITY MCDONOUGH SCHOOL OF BUSINESS
- ISFFA SPEAKER, FROM SUCCESS TO SIGNIFICANCE

Karen is a former US Partner in Ernst & Young's New York Financial Services Office. She has more than 25 years of professional services experience, including 21 years at EY (1999-2020) providing risk and controls, internal audit, governance, compliance and regulatory advisory services to global financial institutions, including banking, capital markets, asset management and private equity clients. From 2005-2010, Karen worked at EY Japan providing risk management and internal control advisory services to the Japanese operations of global financial institutions. Prior to EY New York, Karen worked at EY Philippines (formerly named SGV) from 1993 to 1997 providing financial audit services to clients in various industries.



INTERNATIONAL SOCIETY OF FILIPINOS

ISFFA

IN FINANCE AND ACCOUNTING

**EMPOWERING TOMORROW'S
LEADERS TODAY!**

Mission Statement:

ISFFA is a nonprofit 501(c)3 public benefit corporation whose primary goal is to assist, educate, train, and mentor emerging professionals, both domestically as well as globally. We live by a set of shared values and adhere to the highest ideals of professionalism and ethical behavior in the spirit of integrity, commitment to social responsibility, discipline, and solidarity.

Speakers



CAMELA WISEL

- VICE PRESIDENT, CHIEF ACCOUNTING OFFICER AND CONTROLLER, THE CHEMOURS COMPANY
- ISFFA SPEAKER, FROM SUCCESS TO SIGNIFICANCE

Camela serves as Vice President, Chief Accounting Officer and Controller since October 2021. Prior to that, she served as Vice President, Treasurer of Chemours since September 2020. Camela served in various leadership capacity in Chemours' Treasury and Controllershship organization since joining Chemours in 2015. Prior to joining Chemours, Camela led external reporting, corporate accounting and policies at Trinseo since late 2011, and prior to Trinseo, Camela had over ten years of experience with PricewaterhouseCoopers' Assurance Services in both the Philadelphia and Singapore offices. Camela started her career in the Philippines with SGV.



RALPH VILLANEUVA

- IT SECURITY AND COMPLIANCE ANALYST, HILTON GRAND VACATIONS
- ISFFA SPEAKER, CYBERSECURITY BREACHES IN FINANCE

Ralph has been keeping his employers compliant with IT and cybersecurity requirements across numerous and diverse regulations such as the Nevada Gaming Control Board, Payment Card Industry, COSO-Integrated Framework, COBIT and ISO 27001 since 2007, and data privacy since 2017. His more than two decade's professional internal and IT audit and compliance work in the US and the Asia Pacific region provides him with insights not only in enforcing IT and cybersecurity requirements in light of changing regulatory and technical environments, but also in anticipating and dealing with future trends such as data privacy and post-COVID19 compliance changes. In addition, Ralph has earned numerous IT and non-IT certifications such as the CISA and CISM from ISACA, PCI-ISA and PCIP from the PCI-Security Standards Council, CIA and CRMA from the IIA, CFE from ACFE, CPA from PICPA and ITIL. Since 2010, Ralph has regularly spoken in over forty national and international in-person and virtual conferences of major organizations, the latest of which is the ISACA North America conference in New Orleans, Louisiana on May 4 to 6, 2022. Ralph earned his MBA from the Ateneo de Manila University and his bachelor's degree in business administration, major in accounting, from the University of the Philippines. He is also a licensed property and casualty insurance provider (including cybersecurity) in California, Nevada, Arizona and Texas.



MARIA CECILIA PINEDA

- CYBERSECURITY RISK ADVISOR, SOUTHERN CALIFORNIA EDISON
- ISFFA SPEAKER, CYBERSECURITY BREACHES IN FINANCE
- ISFFA NEB MEMBER

Cecille Pineda prides herself being part of Southern California Edison's ("SCE") Cybersecurity Team, safeguarding critical infrastructure from cyber security attacks as Cybersecurity Advisor. She also collaborates with other utility companies' Cybersecurity team such as Sempra and PG&E, influencing industry change. She currently leads cybersecurity evaluation of the SCE's multi-year Grid Modernization Initiative and California's State of Emergency Battery Energy Storage System implementations, billion-dollar programs, to advise on security measures in relation to industrial critical infrastructure cyber threats. Cecille is currently focusing on Industrial Control System (ICS)/Operational Technology (OT) cyber security. Her cyber security experience includes risk management, governance and policy enforcement, cloud security, vulnerability management, and third-party risk management. She currently holds GICSP, GSEC, GCCC, CISM, CISA security certifications. Cecille started her career as an external auditor at SGV & Co. and was CPA in the Philippines. Her curiosity of financial system reports' integrity shifted her career to information security field.

Speakers



CECIL PINEDA

- SENIOR VICE PRESIDENT AND CHIEF INFORMATION SECURITY OFFICER, R1 RCM, INC.
- ISFFA SPEAKER, CYBERSECURITY BREACHES IN FINANCE

Cecil Pineda is Senior Vice President and CISO for R1 RCM, Inc. He was previously the Senior Director and Program Leader for the VCISO and Consulting Practice at Critical Start. He also served as the CISO of DFW International Airport and also held leadership positions at GameStop, TXU Energy, Boeing and CVS Health. He is an active member of the DFW CISO community, various cybersecurity professional organizations (ISC2, ISACA, IAPP and others). In 2018, Cecil keynoted the Evanta CISO Dallas Summit and spoke at Aviation Cyber Security Summit in 2018, ICS Security Conference in Atlanta in 2019, CDM, Argyle, ISSA, Data Connectors, SecureWorld, ASIS, Executive Alliance and many others. He is currently serving as advisory board members for various institutions such as Tarrant Country College and Collin College. He also assists Salvation Army for their cyber security efforts (pro bono).



JAN PAUL FERRER

- SENIOR VICE PRESIDENT, MORGAN STANLEY
- ISFFA SPEAKER, WEALTH BUILDING: POST-PANDEMIC
- ISFFA NEB MEMBER AND PAST CHICAGO CHAPTER PRESIDENT

JP has been in the financial services industry since 1999. He transitioned to this industry after more than fourteen years in management. He held positions as an Investment Associate, and Operations Manager before becoming a Financial Advisor. JP is committed to making a meaningful difference in his clients' lives by guiding them to make well-informed financial decisions. JP had earned the highly regarded CERTIFIED FINANCIAL PLANNER™ (CFP®) and Chartered Retirement Planning CounselorSM designations. JP was a Magna Cum Laude graduate of Robert Morris University with a B.S. in business administration. JP is the current Vice President and an alumni of the Filipino Youth Leadership Program, Batch FYLPRO 2014. He was also a former president of the International Society of Filipinos in Finance and Accounting, ISFFA, Chicago Chapter, where they have launched the first ever Chicago Filipino Restaurant Week. He also founded a social entrepreneur business, Ambension Silk Enterprise, in collaboration with Chicagoland Gawad Kalinga supporters to provide livelihood work for weavers and farmers. It is incubated at Gawad Kalinga Enchanted Farm at Angat Bulacan. JP enjoys serving as a volunteer for community projects involving fine arts and fund raising for youth scholarships and promoting diversity. He loves to spend time with family and fishing.



MARKUS DE JESUS

- REGIONAL VICE PRESIDENT, EQUITABLE ADVISORS
- ISFFA SPEAKER, WEALTH BUILDING: POST-PANDEMIC
- ISFFA VP LEADERSHIP, SAN FRANCISCO CHAPTER

Markus De Jesus is originally from Mission Viejo, California and obtained his degree from California State University, Chico. Since joining the firm in 2015, Markus has focused on a proactive approach in helping individuals and small business through comprehensive holistic planning. He started his practice helping public education employees within the Retirement Benefits Group (RBG) educating staff on their pension and retirement benefits. Since then his practice has evolved to focus on Private Wealth Management, Employee Benefits, Tax Strategies, and Retirement Planning specifically with Small Business and High Tech Employees. In 2017, he was the top of the class within Retirement Benefits Group in the state of California. In 2018, moved into the leadership development program. In 2020, he was promoted into the Regional Vice President managing one of the top producing districts in. In 2022, he was recognized as the #2 Vice President in Equitable & Awarded the Top Vice President in Northern California. In his spare time, he is an avid lifter and traveler. His goal is to travel to all 7 continents – currently has two left (Antarctica & Africa). He values spending time with his new fiancée and family, while finding ways to connect with his community through mentorship programs.

Speakers



KEVIN SUAREZ

- AUDIT, E&Y LLP
- ISFFA MODERATOR, BUILDING AN ENTREPRENEURIAL MINDSET
- ISFFA EXECUTIVE VICE PRESIDENT, SAN FRANCISCO CHAPTER

Kevin Suarez is an accounting services professional and a dedicated Filipino- American community advocate. A San Francisco Bay Area native, Kevin attended San Jose State University, earning his Bachelor of Science in Economics. Kevin is currently at the registered public accounting firm: Ernst and Young, in the Audit Assurance practice. Kevin's desire to see additional representation in the accounting and finance services industries lead him to join up as the Executive Vice President of the San Francisco chapter of the International Society of Filipinos in Finance and Accounting (ISFFA); an organization that is dedicated to educating, training and mentoring emerging Filipino and Filipino-American professionals in the accounting and financial services industries. Kevin is a proud alumnus of EPHYC (Empowering Youth Through Collaboration); the National Federation of Filipino American Association's Youth Program, and was most recently elected as NAFFAA's Northern California Region Chair in 2022. Kevin has also been a member of the San Jose based organization: LEAD Filipino since 2017, and is also a Board Member of the Sacramento based political action committee: SacFilPAC. Kevin's goal with these organizations is to help train, motivate and inspire the next generation of Filipino-American community leaders, to not just break the "bamboo ceiling", but to also fully realize their potential in their given passions and careers.



DANICA JACINTO

- VP OF FINANCE AND OPERATIONS, 8 INC.
- ISFFA SPEAKER, BUILDING AN ENTREPRENEURIAL MINDSET

Danica is an Executive in Finance and Operations, currently on the Founding Team at No. 8, a newly launched consumer health company whose mission is to use scientifically-proven tools to improve a person's mental wellness and daily performance. Her technical chops come from several experiences, starting in the Philippines where she is from. Working as an Investment Banker at Credit Suisse in Manila first, then eventually building her career with CS in Singapore specializing in Equity Capital Markets and completing over 50 equity deals during her five years with the bank. After banking, Danica moved to the US to complete her MBA at the Stanford Graduate School of Business, where she served as the first Filipino President of the Student Government, in addition to being active in other organizations. Post-MBA, Danica joined as a Founding Team Member of Museum of Ice Cream, an immersive experience created around the universal joy and community that ice cream inspires. During her time at MOIC, Danica led a global team of over 300 employees in delivering a world-class ice cream adventure to over 1 million guests. While the pandemic temporarily closed the museums, Danica led the teams in new business development, including launching the company's virtual experience business. Danica is also a certified yoga teacher, a pandemic-Peloton convert, and a passionate advocate of women in the workplace.



DANIEL GALEON

- HEAD OF RISK GOVERNANCE, PRODUCT RISK, STRIPE
- ISFFA SPEAKER, BUILDING AN ENTREPRENEURIAL MINDSET
- ISFFA NEB MEMBER AND PAST NEW YORK CHAPTER PRESIDENT

Daniel is a Strategy & Ops Lead in the Product Risk team at Stripe, a software-as-a-service company dual-headquartered in San Francisco and Dublin. Prior to Stripe, Daniel spent a decade in financial services working in various roles at Goldman Sachs and Blackrock. He earned a BA with Honors from UC Berkeley and an MBA from Yale University.

Speakers



WINSTON DAMARILLO

- CHIEF EXECUTIVE OFFICER, TALINO VENTURE LABS
- ISFFA SPEAKER, BUILDING AN ENTREPRENEURIAL MINDSET

Winston Damarillo is the Founder and CEO of Talino Venture Labs, a global venture studio of inclusive fintech startups that bridge the financial inclusion gap for underserved, underrepresented groups around the world. He is also the CEO of Talino's portfolio company, BayaniPay, a cross-border neobank for global professionals, and is Chairman of Asenso, a neobank for small businesses. Winston also leads strategy for Talino's portfolio of startups; is the Executive Chairman of Amihan Global Strategies, a leader in digital transformation in Southeast Asia; and is the Founder of DEVCON Philippines, the largest community of tech professionals in the Philippines. On top of all these, Winston is a Silicon Valley veteran with three successful startup exits, a former venture capitalist at Intel Capital, a Young Global Leader of the World Economic Forum (WEF), and a member of the Board of Governors of the Los Angeles Economic Development Corporation (LAEDC).



LIEZL MALABANAN

- SENIOR MANAGER, KPMG LLP
- ISFFA MODERATOR, FILIPINO REPRESENTATION ON BOARDS
- ISFFA NEB MEMBER

Liezl Sangalang is currently an audit senior manager at KPMG LLP and a licensed CPA in the State of California. She has over 12 years of experience with KPMG providing financial statements audits in KPMG's higher education and non-profit practice. She also served as an instructor for the firm teaching local office training topics, including auditing and accounting update and issues. Liezl is a graduate of the University of Santo Tomas and started her professional audit career with SGV & Co.



GENEVIEVE JOPANDA

- CHIEF OF STAFF, CALIFORNIA STATE TREASURER'S OFFICE
- ISFFA SPEAKER, FILIPINO REPRESENTATION ON BOARDS

Genevieve is a San Francisco Bay Area native who has been feeding her passion for government and community advocacy for more than 20 years. In 2010, she was hired by Assembly Speaker pro Tempore Fiona Ma as a District Representative to serve as a liaison to North San Mateo County. In 2015, Genevieve became District Director and later Chief of Staff for the 2nd District on behalf of the California State Board of Equalization. In 2019 she assumed her current position as Chief of Staff for the California State Treasurer serving upwards of 10 million constituents in 23 counties. Genevieve has held numerous notable nonprofit leadership roles including serving as the Daly City Parks and Recreation Commissioner, Festival Director for the Filipino American Arts Exposition, Board President for the West Bay Pilipino Multi Service Center, and State Chair for the Filipino American Democratic Caucus.

Proud of your rich cultural heritage? We are, too.

KPMG values the significant contributions of all our Asian Pacific Islander partners and professionals. We recognize that the passion, determination and leadership of your culture help enrich ours.

kpmg.com/us



Speakers



MIGUEL SANGALANG

- EXECUTIVE DIRECTOR AND GENERAL MANAGER, CITY OF LOS ANGELES BUREAU OF STREET LIGHTING
- ISFFA SPEAKER, FILIPINO REPRESENTATION ON BOARDS

Miguel Sangalang currently serves as the Executive Director and General Manager for the Bureau of Street Lighting of the City of Los Angeles (LA LIGHTS). As the head of the agency his role is shaped by two major responsibilities: the upkeep and improvement of the city's 220,000 street lighting infrastructure assets; and, the adoption of new tools and practices to ensure the city meets the needs of its residents well into the future. To that end, he is working to make street lighting a true neighborhood asset that reflects the culture of the communities it illuminates, improves public safety, and helps create new connections between residents. Miguel previously served as Deputy Mayor for Budget & Innovation for LA Mayor Eric Garcetti. He directly oversaw the annual city budget, performance management, personnel, risk management, procurement reform, technology infrastructure, as well as sustainability, equity in service, gender equity, data, emerging technologies, and the local implementation of Census 2020. Six city departments with over 3,000 personnel directly reported to his office. As a 13-year veteran of LA government, he also served under former Mayor Villaraigosa as the head of Performance Management, where he was in charge of tracking and delivering top priorities and started his career as a Systems Analyst in the Bureau of Sanitation.



MARY TEE

- VICE PRESIDENT AND CONTROLLER, PRINCESS CRUISES
- ISFFA SPEAKER, FILIPINO REPRESENTATION ON BOARDS

Mary Tee is the Vice President and Controller of Princess Cruises located in Southern California. She has over twenty years of experience in finance and accounting which includes holding key leadership and managerial roles at E&Y and several Real Estate and Entertainment companies such as Ascent Media Group, Public Storage and The Walt Disney Company. She also serves as a member of the Executive Committee of the Board of Governors at the University of Southern California and is also the President-Elect of the USC Asian Pacific Alumni Association for USC. In addition, she recently joined East West Players as a Board of Director serving on the Finance Advisory Committee. She earned her Bachelor's Degree from the Leventhal School of Accounting at the University of Southern California and is a Certified Public Accountant.



CHARINA AMUNATEGUI

- EXECUTIVE DIRECTOR, MUFG INVESTOR SERVICES
- A MASTERCLASS ON PERSONAL BRANDING AND SELF-ADVOCACY
- ISFFA NY CHAPTER ADVISOR

As featured on Forbes, Thrive Global and other publications, Charina Amunategui is making a difference in the alternative funds industry with a mix of motivation, persistence and understanding. She is a business executive, writer, mentor, and speaker that empowers the next generation in the finance industry. Currently Executive Director, Business Execution for MUFG Investor Services in New York City, she has over two decades' worth of experience and has worked in the United States, Canada, Bermuda, and the United Kingdom. In the highly competitive world of global finance, Charina stands out with her determination, drive and discipline. These 3Ds have been instrumental in getting her where she is today. After immigrating to Canada from the Philippines at the age of 14, Charina has learned to consistently believe in her abilities and turn creative power and potential into palpable success. She has recently been accepted to Yale University's MBA for Executives Class of 2024 specializing in the Asset Management track.

2022 ISFFA / AICPA Scholars

ISFFA in cooperation with AICPA is granting competitive merit-based awards of \$2,000 for each of the following students:



Lauren Rodriguez
California State University, Northridge



Abigail Arevalo
California State University, Northridge



Ampie Elomina
California State University, Northridge



Marine Andokyan
California State University, Northridge



Lien Ngo
University of the Cumberlands

Message from the Outgoing National Executive Board Chair

Congratulations to the ISFFA National Executive Board and Chapter Officers! I am excited that we are able to have the conference back after 4 years. It was a very fulfilling experience to see how ISFFA continued to evolve and thrive. While I concluded my term in 2021, the theme of this year's conference "To Infinity and Beyond" shows ISFFA's energy and that we are moving forward.



I would like to take this opportunity to express my sincerest gratitude for all your support during my 3-year term. My vision was to expand outreach and involvement of "finance" professionals in ISFFA. My high priority goals were to re-activate New York and San Francisco Chapters, find more scholarship opportunities for members, and to establish a formal international chapter.

As a team, we were able to accomplish a lot! ISFFA leadership and mentoring program events were held and inspired many of our members. We have re-launched New York and San Francisco Chapters. Our Chapter officers and members now include professionals from prominent financial services firms, CPA firms, FinTech, IT-Finance, controllers, auditors, and accountants. While we were not able to open an international chapter, we have expanded our reach to global finance and accounting professionals through the NEB Global Speaker Series.

Our scholarship programs continued to award support for students in the US through the AICPA ISFFA Scholarship. We received scholarship funds from the Illinois CPA Society, and we have scholarship funds for finance and accounting college students that will be awarded soon. Further, to help pave the way to CPA for Philippine students, the ISFFA Chicago Floresca Scholarship was awarded to several students.

Community Service support was overwhelming, as we had several calamities in the Philippines – Taal Volcano eruption, back-to-back typhoon Goni and Ulyses, and typhoon Odette. Despite the challenges of the pandemic, ISFFA officers and members stepped-up, coordinated directly with friends and relatives to help hundreds of families be provided with relief goods, food and supplies.

As I complete my transition to Kathy Lai, our new Chair of the National Executive Board, I thank you also for being here and sharing ISFFA's mission and purpose. I have personally seen the impact of ISFFA's programs. I have seen leaders help new leaders emerge, mentors share their life lessons and guidance to those who asked, and more importantly, I have experienced how we lifted each other up, whether as we climb our professional ladders, or as we transition to new careers or jobs. I encourage you to continue to embrace and support ISFFA's programs. You will appreciate what ISFFA can do for you!

I wish the new officers the best, as you move forward and take ISFFA to the next level: To Infinity and Beyond. Lead. Mentor. Find your purpose. Make a difference.

Warm regards,

Maria Fides Balita

Outgoing ISFFA National Executive Board Chair

2022 ISFFA Recognition Award

The ISFFA Recognition Award is awarded bi-annually to leaders in the fields of Finance and Accounting under the following categories:

1. **Leadership:** Communicates the vision and mission of their organization and translates them into actionable goals. Develops, coaches, and motivates diverse individuals and teams. Promotes a positive culture of engagement within the immediate team and across the organization; or
2. **Mentorship:** Mentors and cultivates employees, creating a culture of respect that fosters an atmosphere conducive to achievement; or
3. **Citizenship and Community:** Demonstrates outstanding citizenship. Takes action to build or strengthen a caring, connected community; or
4. **Environment of Diversity and Inclusion:** Creates a working environment at their organization that is respectful and welcoming for everyone. Takes actions to increase diversity; fosters inclusive attitudes and behaviors.

Emerging Leaders Awardees:

Marian De Guzman – Leadership
Patricia Lingasin – Leadership
Kristine Dandan – Leadership
Dexter Jumamoy – Mentorship
Kevin Suarez – Citizenship & Community

Experienced Leaders Awardees:

Ian Mendoza – Diversity & Inclusion
Malve Ildefonso – Leadership
Stella Marie Santos – Mentorship
Daniel Galeon – Citizenship & Community



THE NATIONAL 2022 EXECUTIVE BOARD

www.isffa.org

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Kathy Lai
Partner
Crowe, LLP

VICE-CHAIR



Malve Ildefonso
Assurance Partner
BDO's Asset Mgt Practice

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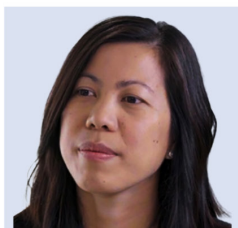
Gilda Priebe
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TREASURER



Lyn Labastilla
Audit Director
Vasquez & Co, LLP

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Liezl Sangalang
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Arvin Floresca
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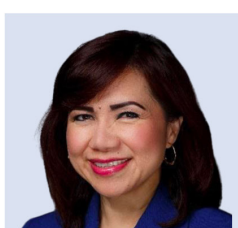
Daniel Galeon
Head of Risk Governance
Stripe



Cecille Pineda
Cyber Security Advisor
SoCal Edison



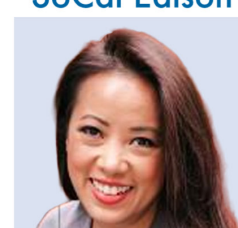
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LA Metro



Holly Vocal
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Mellisa Sanvictores
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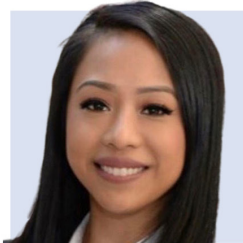
EX-OFFICIO – CHAPTER PRESIDENTS

Southern California



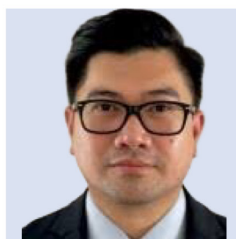
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Sr Manager
BDO

San Francisco



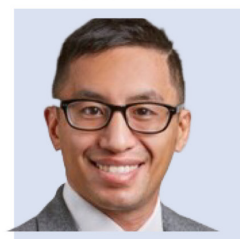
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Coinbase

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Audit Manager
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Rey Osma
Director,
Real Estate Tax
PWC

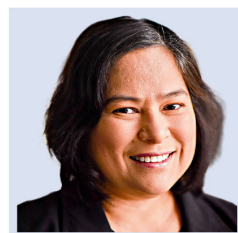
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Managing Partner
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Edith Winterhalter
AVP, Budget & Strategic
Business Operations
CSUN



Maria Fides Balita
Registered Representative
Transamerica Financial
Advisors, Inc

2022 ISFFA National Conference

Congratulations to the Officers and Members of the
International Society of Filipinos in Finance and Accounting!



400 E. Randolph Street, Suite 700, Chicago, Illinois 60601
Tel: (312) 240-9500 | Fax (312) 240-0295 | www.adelfiacpas.com



JBC Group, LLC is proud to be a major sponsor of the **2022 International Society of Filipinos in Finance and Accounting National Conference!**

As one of ISFFA's founders, we are honored to support ISFFA's commitment to Leadership, Mentorship, Scholarship, and Community Service. This year's theme *TO INFINITY & BEYOND* is testament the growth and continuing opportunities for everyone, especially to our members.

Mabuhay ISFFA and the National Board and Chapters for this milestone.

MARIA BENEL CORAZON G. SE CPA
MANAGING PARTNER

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ISFFA Staying Connected





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higher**

Bank of America is proud to support the
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Finance and Accounting

ISFFA Staying Connected





THE ISFFA CHICAGO – FLORESCA PHILIPPINE CPA REVIEW SCHOLARSHIP FUND

The fund aims to provide CPA review opportunity for financially-challenged Accounting graduates to pursue their dream of becoming a Certified Public Accountant in the Philippines.

Arvin and Gayle Floresca pledged to send a minimum of 4 scholars (as a legacy of the 4 CPAs in their family – the couple plus Pico and Jeff, Arvin's dad and brother) annually to a CPA review school in the Philippines. The ISFFA Chicago Chapter will coordinate the administration of the Scholarship grant and will contribute to the fund annually based on its fund-raising efforts, with the support of the Floresca family.

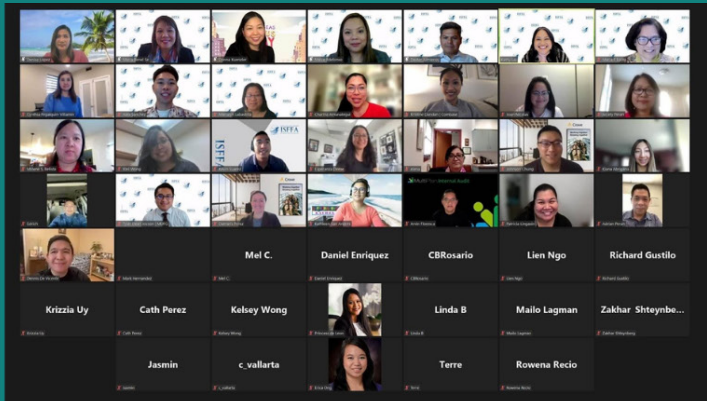
For this year, we have sent **10 Scholars in the Philippines** on their way to fulfilling their dreams of becoming a CPA.

For only \$300, you will be able to help one person's dream of becoming a CPA come true. To donate, please go to isffachicago.org, scroll down and click on the DONATE button. Please write CPA review as a note.



The Institute of Internal Auditors San Gabriel Valley (IIA-SGV) Chapter proudly supports the ISFFA Conference 2022! Chapter membership includes internal auditors and management from a variety of industries and organizations including healthcare, finance/banking, utilities, transportation, public accounting, and education. Membership is open to anyone with an interest in the Internal Auditing profession. We encourage everyone to achieve Certified Internal Auditor status. The Chapter serves our members in internal auditing, governance, internal control, IT audit, education, and security. Our goal is to provide a balanced program of continuing education, and opportunities to meet fellow professionals. We offer free membership to students who would like to volunteer and network with leading professionals. Please contact Rey Bejerano, Chapter President for more details at Rey.Bejerano@lausd.net

ISFFA Staying Connected



ISFFA OUTLOOK 2021
(A VIRTUAL EVENT) LEARN ABOUT THE 4 PROGRAMS OF THE INTERNATIONAL SOCIETY OF FINANCE AND ACCOUNTING.

LEADERSHIP MENTORSHIP COMMUNITY SERVICE SCHOLARSHIP

FEB 20 SATURDAY 10-11 AM PST (1-2 PM EST)

www.isffa.org

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Asst VP, MUFG Americas
ISFFA SF Chapter President

KEVIN SUAREZ
Associate, Ernst & Young
ISFFA SF Exec. VP

CHICAGO

JAN PAUL FERRER
First VP, Morgan Stanley
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Director, Allergan
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IN FINANCE AND ACCOUNTING

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BIG OR SMALL, EVERY EFFORT COUNTS TOGETHER, WE CAN MAKE IMPACT.

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Chicago Chapter
<https://www.isffa.org/chicago>

New York Chapter
<https://www.isffa.org/newyork>

1. Please scroll down to Donate button
2. Add a note "Columbity Fund - Typhoon"

The International Society of Finance and Accounting (ISFFA), formerly known as The International Society of Young Finance Executives (ISYFE) is a California nonprofit public benefit corporation whose primary goal is to assist, educate, train and mentor young finance professionals, both internationally as well as globally. <https://www.isffa.org>

NICOLE MENDOZA-PATEL
ALLERGAN

DEXTER JUMAJOY
BOO USA LLP

MICHAEL GONZALEZ
ERNST & YOUNG LLP

JAMES FRASER
CYPRESS AMBROSIO

THURSDAY MAY 27
12-1 PM PST
3-4 PM EST
AUDIT & ACCOUNTING LEADERS ROUNDTABLE

KEVIN SUAREZ
ERNST & YOUNG LLP

TIFFANY AQUINO
BOO USA LLP

CELEBRATING ASIAN AMERICAN PACIFIC ISLANDER (AAPI) HERITAGE MONTH

ISFFA SF

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ISFFA GLOBAL LEADERSHIP SERIES
LEADERSHIP JOURNEY ACROSS CONTINENTS: ADAPTING TO THE TIME

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ENTREPRENEUR
ROMULO CAFE & RESTAURANT
LONDON

MARIA FIDES BALITA
PARTNER
ADELFA LLC
CHICAGO

ARVIN FLORESCA
VP INTERNAL AUDIT
MULTIPLAN
CHICAGO

MODERATORS:

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AUDIT SENIOR MANAGER
KPMG US LLP

DIANA ESTRADA
DEPEXEC OFFICER
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ADVISER:

BENEL SE-LIBAN
MANAGING PARTNER
JEC GROUP, LLC

THURSDAY MAY 20, 2021
12PM PST, 2PM CST, 8PM LONDON TIME.

REGISTER:
<https://bit.ly/3nGqQyc>

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ISFFA
1ST GLOBAL EXECUTIVE SPEAKER SERIES PANEL (A VIRTUAL EVENT)
THEME: LEADERSHIP JOURNEY ACROSS CONTINENT: ADAPTING TO A NEW CULTURE AND ENVIRONMENT
MAR 03, 2021 12PM - 1PM PST

BONNA AYELLARA KUNZLER
Author, "The Overseas Fabulous Pinay", Switzerland

ALBERT LAU
Global Chief Risk Officer, East West Bank, Irvine, California U.S.A.

ERLINDA GLALIA CARIN
National Partner - Risk Consulting, SPMG, Toronto, Ontario, Canada

FROM THE ISFFA NEB LEADERSHIP SERIES COMMITTEE:

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ARVIN FLORESCA
VP Internal Audit, Multiplan, Chicago

DIANA ESTRADA
Depeexec Officer, La Metro

MARIA FIDES BALITA
Partner, Adelfa LLC, Chicago

MARIO LAGMAN
Controller, St. Joseph Center

ADVISORS:

MARIA FIDES BALITA
Partner, Adelfa LLC, Chicago

ARVIN FLORESCA
VP Internal Audit, Multiplan, Chicago

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Managing Partner, JEC Group LLC, ISFFA Founder

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DIVERSITY AND INCLUSION PANEL DISCUSSION

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TIDE

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MORGAN STANLEY

DANIEL GALEON
STRIPE

PAUL MAGAHIS
STONEK

KRISTINE DANDAN
MUFG

ISFFA
IN FINANCE AND ACCOUNTING

TUESDAY MAY 18TH
12-1 PM P.T. / 3-4 PM E.T.

Asian American Pacific Islander (AAPI) Heritage Month

Message from the ISFFA Socal Chapter President

On behalf of the ISFFA Southern California Chapter, it is my pleasure to welcome you to the 2022 ISFFA National Conference.

The theme of our conference is "To Infinity and Beyond." Like a true Disney story, this is to inspire us all that our professional journey and successes have no limits.

We have invited distinguished speakers and panelists with the idea that we can learn and draw inspiration from their varied experiences, challenges, and triumphs. To set the tone and to take us through "infinity and beyond", we are fortunate to have two exceptional and inspirational Keynote speakers, Consul General Edgar Badajos and Jessica Cox.

Mr. Badajos is the current Consul General of the Philippine Consulate in Los Angeles. He has held various positions and responsibilities with the Philippine Department of Foreign Affairs, bringing him to all corners of the globe to represent the Philippines and support Filipinos abroad.

Ms. Cox is best known as the first armless pilot in aviation history. Her achievement earned her a Guinness world record, and she has shared her inspirational story appearing on popular TV programs in the US and around the world.

I am delighted that you have chosen to join us at this event. This conference brings together professionals and emerging professionals in the finance and accounting field to educate, get inspired, create new connections, and, more importantly, have a good time here in Southern California.

Thank you for attending and to all our sponsors who have generously supported making this magical event at Disney a reality.

Salamat,

Dexter Jumamoy
President, ISFFA SoCal Chapter



ISFFA Chapter Officers

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Villalyn Baluga, *Auditor*
Pia Pagtalunan, *VP of Scholarship*
Karen Porto, *VP of Mentorship*
Romil Sison, *VP of Membership*
Kay Vallarta, *VP of Marketing*
Kaye Nabo, *VP of Communications*
Ian Mendoza, *VP of Community Service*
Andrew Gorordo, *VP of Leadership*

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Ria Anne Coronel, *Secretary*
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Melissa Nafarrete, *Auditor*
Richard Yamomo, *VP of External Affairs*
Maria Divina Valera, *VP of Mentorship*
Ian Mendoza, *VP of Outreach and Community*
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Anjo Neil Guillermo, *VP of Membership*
Paula Arnedo, *VP of Advertising and Promotion*

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Adrian Pangilinan, *VP Membership*
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Hilary Spencer, *VP Community Service*
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Lloyd Aragon, *Treasurer*
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Belvin Armenion & Klaudine Barba,
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Joanne Canosa, *VP Community Service*

ISFFA Chapter Officers

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Tiffany Aquino, *VP of Community Service*

Markus DeJesus,

- *VP of Membership (until June 2022)*

Kiana Abrigana,

- *Program Manager (2022 to current)*

Amanda Pulido,

- *VP of Membership (2022 to current)*

Holly Vocal, *Advisory Member*

Danica Jacinto, *Advisory Member*

Peter Martinez, *Secretary (2021)*

Chelsea Soriano, *Intern (2021)*

Alex Chu, *VP of Membership (2021)*

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Alex Sanchez, *Secretary*

Kathleen San Andres, *Treasurer*

Kelsey Wong, *VP of Mentorship*

Tyler Dean Jocson, *VP of Leadership*

Breanna Tomenis,

- *VP of Outreach & Community Service*

Winn Frazin, *VP of Membership*

Patricia Lingasin,

- *VP of Advertising & Promotion*

Johnson Chung, *VP of External Affairs*

Krizzia Uy, *VP of Student Affairs*

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Xinya (Shelly) Liao

Brent Tuanquin

Joan Pante

Monica Monserrat

Hanel Velez

16 Years of ISFFA

We want to thank all of ISFFA's current and past officers from all the chapters and the National Executive Board, as well as our advisors and friends.

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*Rest in peace

Message from the Founder of ISFFA



On behalf of the ISFFA Founders, I would like to extend a huge congratulations to the ISFFA National Board and Chapter Officers for organizing the 2022 ISFFA National Conference. This year's powerful conference theme is *To Infinity and Beyond!*

Despite the COVID-19 pandemic, I am so proud to witness your passion, dedication, and commitment to ISFFA's mission by successfully implementing the leadership, mentoring, scholarship and community service programs "virtually" during the past two years. Your resilience culminates with this amazing "live" ISFFA National Conference at Disneyland, the "happiest place on earth". Thank you for showing to the world what going *To Infinity and Beyond* truly means, especially when dreaming big while making a positive impact! Since its inception in November 2006, ISFFA has inspired so many of us to make a difference and to think outside the box: beyond accounting and finance. Our journey with ISFFA has been an exciting journey of limitless possibilities in discovering, sharing, and improving our talents and leaderships.

Thank you for being the catalyst of change and significance through ISFFA!

May this quote from Michael Josephson be your guiding principle in achieving your path *To Infinity and Beyond* life's purpose and journey:

"What will matter is not what you bought but what you built, not what you got but what you gave.

What will matter is not your success but your significance.

What will matter is not what you learned but what you taught.

What will matter is every act of integrity, compassion, courage, or sacrifice that enriched, empowered, or encouraged others to emulate your example.

What will matter is not your competence but your character.

What will matter is not how many people you knew, but how many will feel a lasting loss when you're gone.

What will matter is not your memories but the memories that live in those who loved you.

What will matter is how long you will be remembered, by whom and for what.

Living a life that matters doesn't happen by accident.

It's not a matter of circumstance but of choice.

Choose to live a life that matters."

Mabuhay ISFFA!

God Bless,

Maria Benel Corazon G. Se, CPA

Founding President

International Society of Filipinos in Finance and Accounting



2022 ISFFA NATIONAL CONFERENCE

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Malve Ildefonso, *NEB*
Liezl Sangalang, *NEB*
Lyn Labastilla, *NEB*
Daniel Galeon, *NEB*
Gilda Priebe, *NEB*
Cecille Pineda, *NEB*
Arvin Floresca, *NEB*
Diana Estrada, *NEB*
Kristine Dandan, *NEB*
Dexter Jumamoy, *SoCal Chapter President*
Patricia Lingasin,
- *SoCal Chapter VP of Marketing and Promotion*
Maria Fides Balita, *NEB Advisor*
Benel Se-Liban, *NEB Advisor*
Edith Winterhalter, *NEB Advisor*

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Patricia Lingasin,
- *SoCal Chapter VP of Marketing and Promotion*
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Tyler Jean Jocson,
- *SoCal Chapter VP of Leadership*
Kelsey Wong,
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Arvin Floresca, *NEB*
Roberto Concepcion, *NEB*

REGISTRATION

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- *SoCal Chapter VP of External Affairs*

SOCIAL MEDIA

Daniel Galeon, *NEB*
Mailo Lagman, *NEB*

ISFFA Future Events & Activities

Chicago Chapter

- » Picnic in August 2022
- » Fundraising – Q4 2022

San Francisco Chapter

- » October – Collaboration event with Financial Women of San Francisco (FWSF)
- » December – WestBay Pasko Wishes

SoCal Chapter

- » Community Service – Q4 2022

NEB Leadership Series

- » November 2022
- » January 2023
- » May 2023

**See you in
New York in 2024!**

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at the DISNEYLAND[©] Resort[™]
July 31 – August 2, 2022**