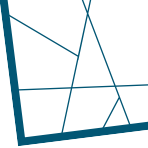




CLO/CFO PARTNERSHIP PROGRAM

*2025 Chapter Grant
Application, Progress Report,
& Final Report Highlights*





ACTIVITY PURPOSE

The core objective of Stronger Together was to foster meaningful collaboration between Legal and Finance leaders—two traditionally siloed yet critical business functions. This was achieved through a unique joint dinner panel hosted by ACC Southern California and the CFO Executive Summit, offering a platform for candid, cross-functional dialogue.

Seasoned General Counsel and CFOs engaged in peer-led discussions focused on real-world scenarios, exploring key themes like M&A strategy, risk management, budgeting, and litigation planning. The program emphasized trust-building, early engagement, and alignment of strategic priorities, blending storytelling with actionable insights to create a highly relatable and practical experience.

The event drew over 90 attendees and exceeded expectations in both engagement and impact. Legal and finance professionals from diverse industries participated, with strong post-event interest and discussions highlighting the program's continued relevance. Feedback reflected high satisfaction with content quality, applicability, and overall value, and many attendees expressed interest in making it an annual program. One of the most meaningful outcomes was the formation of new cross-functional connections and commitments to ongoing collaboration. The event also generated new membership inquiries for both host organizations, broadening community reach and impact.

The objective was fully met—and, in many ways, surpassed. Stronger Together not only raised awareness of the importance of Legal-Finance collaboration but also inspired real action. By breaking down silos and offering a playbook for integrated leadership, it empowered attendees to drive more cohesive decision-making within their organizations and positioned ACC Southern California as a leader in progressive, cross-functional programming.

GOALS ACHIEVED

Fostered Cross-Functional Collaboration

- Created a shared platform for General Counsel and CFOs to engage in strategic, high-level dialogue.
- Encouraged legal and finance leaders to move beyond siloed thinking and embrace joint problem-solving.

Delivered High-Impact, Relevant Content

- Addressed real-world challenges like M&A, risk management, budgeting, and litigation planning.
- Panelists shared actionable strategies, which attendees found directly applicable to their roles.

Exceeded Attendance and Engagement Targets

- Welcomed over 90 attendees, surpassing expectations for participation.
- Maintained balanced representation from both the legal and finance sectors.

Generated Strong Feedback and Future Interest

- Post-event surveys indicated high satisfaction with content quality and structure.
- Attendees expressed enthusiasm for making it an annual program.

Built Professional Networks and Organizational Value

- Facilitated new cross-functional connections and commitments to ongoing collaboration.
- Sparked new membership interest in both ACC Southern California and the CFO Executive Summit.

Elevated ACC Southern California's Role as a Strategic Convener

- Positioned the chapter as a leader in innovative, cross-disciplinary programming that reflects the evolving needs of today's in-house counsel.

KEY TAKEAWAYS

Collaboration is Critical

Legal cannot operate in a silo—early collaboration with Finance leads to better business outcomes, improved risk management, and smarter resource allocation.

Legal as a Strategic Partner

High-performing legal departments establish trust and align closely with cross-functional teams, ensuring they have a seat at the table from the outset of projects and initiatives.

- Legal-Finance Alignment Drives Success

The Finance team plays a pivotal role in shaping Legal's ability to function effectively, particularly around budgeting, litigation, and M&A activities.

Alignment on goals and priorities is essential.

- Budgeting & Risk Management Must Be Joint Efforts o Legal is often perceived as a cost center—early buy-in from Finance helps Legal secure necessary resources and demonstrates the value of proactive risk mitigation.
- eg. Insurance - Risk Adverse vs Premium Costs
- Real-World Lessons in Collaboration

Panelists will share examples of successful collaboration, lessons learned from challenges, and practical strategies to improve Legal-Finance synergy. ☑ Networking for Continued Connection

The event offers a valuable opportunity for in-house counsel to engage directly with CFOs and Finance professionals, fostering relationships that can lead to ongoing collaboration and mutual understanding.



BUDGET

Application

Requested Funds: \$6,000

- \$5,500 for venue, food, drinks, AV and content. We will be collaborating with an organization called The Executive CFO Summit. Both organizations focus on corporate C suite executives as members and will be a great networking and new member opportunity for both organizations.

Final Report

Approved Funds: \$4,000

- 100 Attendees
- Venue - Andrei's Restaurant in Irvine
- AV
- Food
- Drinks
- Total \$9,000
- CFO Executive Summit contributed \$1500
- Stradling Sponsor contributed \$2500
- ACC Southern CA hosted the rest for a total of \$5,000 of which \$4000 of that was the grant money provided.

PROMOTIONAL STRATEGY

We will market to both ACC SoCal's member-base and the CFO/Finance organization's members using email blasts and social media. When we promote on LinkedIn, we will reach non-members who will see this unique programming being offered by ACC in collaboration with a CFO/Finance organization and the opportunity to network with business people, not just lawyers. This event will cooperate in increasing ACC's visibility to non-members and add value to members.

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Building Strong Finance-Legal Relationships to Strengthen the Business

Share

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SEARCH DELOITTE A

Finance and legal executives often find themselves at the same table (although sometimes in different rooms). Building a strong relationship, the

At Del

Jeff



ACC Association of Corporate Counsel
SOUTHERN CALIFORNIA



Stronger Together: Building Strategic Partnerships Between Legal and Finance

CLO and CFO Panel: Words vs Numbers

THURSDAY, MAY 28 AT 5PM
ANDREI'S, IRVINE CA



JASON WEINTRAUB
JACCUZI CLO



ADORA MONTMINY
JACCUZI CFO



ISABEL MERCADO
VIZO CLO



ADAM TOWNSEND
VIZO CFO



KARL SHIN
MSI CLO



JAMIE CHASTAIN
MSI CFO



AMBER ENRIQUEZ
ECOS GC - MODERATOR

