



INTERNATIONAL SOCIETY OF FILIPINOS

ISFFA

IN FINANCE AND ACCOUNTING

2026

ISFFA NATIONAL CONFERENCE

20 Years in the Spotlight: Lights. Leadership. Legacy.

Filipino professionals taking center stage in finance and accounting.

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for more information visit us at
<https://2026conference.isffa.org>

Message from the National Conference Planning Committee Co-Chair

Dear ISFFA Family, Friends, and Colleagues,

On behalf of the 2026 National Conference Committee, it is our honor to welcome you to
20 Years in the Spotlight: Lights. Leadership. Legacy.

Twenty years ago, a small group of Filipino finance and accounting professionals decided that our community deserved a seat at the table and a room of our own to build one. Two decades later, we gather at the City Club Los Angeles as partners, CFOs, controllers, entrepreneurs, board members, and public servants. What began as a network has become a legacy.

This year's program is designed to honor that history while pushing us forward. Friday evening, we celebrate at our Anniversary Gala, recognizing the leaders and advisors whose service shaped ISFFA and welcoming the incoming National Board. Saturday, we turn to the work ahead: technical updates across audit, tax, and transaction advisory; candid conversations about career paths in public accounting and the C-suite; strategies for building wealth and an entrepreneurial mindset; and a frank look at advancing Filipino representation in boardrooms across the country.

Our hope is that you leave with more than notes. We hope you leave with a mentor you didn't have on Friday, a connection who opens a door next quarter, and a clearer sense of what your own legacy might look like.

So take center stage. Ask the question in the breakout session. Introduce yourself to the person standing alone at the reception. Say yes to the board seat you weren't sure you were ready for. That is how the last twenty years happened one person stepping into the light and reaching back for the next.

Thank you for being here, and thank you to our sponsors, volunteers, and speakers who made this milestone possible.

Maraming salamat, and welcome to the spotlight.



Liezl Malabanan

ISFFA National Executive Board



Angel Naval

ISFFA National Executive Board

Program Schedule

8/14

The Gala | Registration & Cocktail Hour

Starts @ 6:30 PM

Keynote Address, Awards and Oath Taking Ceremony

Starts @ 8:00 PM

Dancing and Live Music

Starts @ 9:00 PM

8/15

Registration & Networking

Starts @ 9:00 AM

Welcome Remarks & Keynote Address

Starts @ 10:00 AM

General Session

Starts @ 11:00 AM

Concurrent Breakout Session

Starts @ 1:00 PM

Closing Remarks Session

Starts @ 3:50 PM

**Scan QR Code for complete
conference program schedule.**



Message from the **Outgoing National Executive Board of ISFFA**



Kathy Lai

Chair, ISFFA National
Executive Board

A handwritten signature in black ink that reads "Katherine V. Lai".

Welcome to the 2026 ISFFA National Conference and our celebration of **20 Years in the Spotlight: Lights. Leadership. Legacy.** It is both an honor and a privilege to welcome you as Chair of the ISFFA National Executive Board. As one of ISFFA's founders, this anniversary is especially meaningful to me—not only because of how far our organization has come, but because of the remarkable journeys of the people who have made it what it is today.

Many of us began our ISFFA journey as young finance and accounting professionals seeking connection, mentorship, and opportunities to grow. Today, we serve as CFOs, partners, controllers, entrepreneurs, educators, and leaders in some of the world's most respected organizations. Together, we have broken barriers, challenged stereotypes, and demonstrated the extraordinary contributions of Filipino professionals in finance and accounting.

As we celebrate this milestone, we also embrace our responsibility to those who will follow. Many of us have achieved the careers we once only dreamed about. We have earned our seats at the leadership table. Now, our responsibility is to open doors for those coming behind us—to mentor them, invest in them, and ensure they know that no dream is beyond their reach. That commitment is the legacy we leave and the future we build together.

Through our programs in leadership development, mentorship, scholarships, professional education, and community service, and guided by our core values of Integrity, Discipline, Commitment to Social Responsibility, and Solidarity, ISFFA continues to prepare future leaders while strengthening our profession and our community.

Thank you for being part of the ISFFA family and for believing in the vision that has united us for two decades. As we celebrate this milestone, may we renew our commitment to one another, continue lifting each other up, and inspire the next generation to dream bigger, lead boldly, and give back with purpose.

Welcome to the 2026 ISFFA National Conference. Here's to celebrating our legacy—and to building an even brighter future together.



Smart decisions today. Lasting value tomorrow.™

Crowe proudly supports International Society of Filipinos in Finance and Accounting (ISFFA) as it works to assist, educate, train, and mentor emerging professionals. We believe supporting ISFFA is a smart decision that will create lasting value for all of us.

At Crowe, we work with our clients in ways that help them make smart decisions amid complexity and uncertainty. This drives lasting value – sometimes in unexpected ways.

To learn more, visit **crowe.com**.

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Conference Speakers

2026 ISFFA National Conference **Keynote Speakers**



Nino Jefferson Lim

Island Pacific Market, Businessman / Founder

Nino Jefferson Lim is the Founder of Island Pacific Supermarket, one of the largest Filipino-American supermarket chains in the United States. A graduate of the USC Leventhal School of Accounting, he chose entrepreneurship over a traditional career in public accounting or corporate finance to pursue a vision inspired by his family's experience in the Filipino grocery business. Over the past twenty-five years, he has grown Island Pacific into a leading Filipino-American retail brand dedicated to preserving Filipino culture, serving immigrant communities, and creating opportunities for future generations. Under his leadership, the company has earned national recognition as one of Fortune magazine's Best Workplaces in Retail. Nino is passionate about entrepreneurship, leadership, and building enduring institutions that strengthen both communities and the next generation of Filipino-American business leaders.



Maria Hollandsworth

Former President & COO of El Pollo Loco

Maria Hollandsworth's career reflects resilience, growth and determination. A graduate of the University of the Philippines with a Bachelor of Science in Public Health, she began her professional path as a research assistant supporting nutrition studies at the university. She later moved to the United States, embracing the challenge of building

a new career from the ground up. Through hard work and perseverance, Maria built a successful leadership career in the quick service restaurant industry, earning a reputation for operational excellence, people leadership, and transformational growth. She believes leadership is about inspiring others, creating opportunities, and helping teams achieve more than they thought possible. Maria holds an MBA from Grand Canyon University. She was named one of the Orange County Business Journal's 2024 Top 5 Women in Business and included in Nation's Restaurant News' 2025 Power List: Women in Food Service. In 2025, she also served as a Director on the LA Branch Board of the Federal Reserve Bank of San Francisco.



Hon. Adelio Angelito Cruz
Philippine Consulate, Consul General

The Honorable Adelio Angelito S. Cruz assumed the position of Consul General of the Philippine Consulate General in Los Angeles on 23 December 2024, a role he previously held from July 2016 to January 2021. Prior to his second posting in Los Angeles, Consul General Cruz held the position of Assistant Secretary at the Department of Foreign Affairs' (DFA) Office of Consular Affairs. He was also designated as the Chief of Presidential Protocol and Presidential Adviser for Foreign Affairs at the Office of the President from July 2022 – October 2023. As a veteran diplomat with over 30 years' experience, Consul General Cruz served in various diplomatic and consular positions in the following Philippine Foreign Service Posts: Charge d'Affaires, en pied, in Tripoli, Libya; Consul General in Xiamen, China; Consul General at the Philippine Embassy in Abu Dhabi and Consul at the Philippine Consulate General in Chicago.



Jennifer Cabalquinto
Independent Director

Jennifer Cabalquinto is a Public Company Director, Board Chair, Audit Committee Chair, and former Chief Financial Officer with more than 30 years of financial, operational, and governance leadership across public companies, private equity-backed businesses, regulated investment entities, and nonprofit organizations. She is recognized for strengthening governance, providing disciplined financial and risk oversight, and helping organizations navigate growth, transformation, and strategic change. Jennifer currently serves as an Independent Director of Playboy, Inc. (NASDAQ: PLBY), a global consumer products, licensing, and lifestyle company. She provides oversight of strategy, risk management, governance, and long-term value creation, drawing on her experience leading and advising brand-driven businesses through periods of growth and transformation. She also serves as Board Chair of KQED, one of the nation's leading public media organizations. In addition, she serves as Independent Director and Audit Committee Chair of American Century Investments' California mutual funds, where she oversees financial reporting, valuation, and regulatory compliance. Previously, Jennifer served as Independent Director and Audit & Risk Committee Chair of IMG Academy, a global sports education company backed by private equity sponsor EQT, and as Independent Director and Audit Committee Chair of Sabio Holdings, Inc. (TSXV: SBIO / OTCQX: SABOF), a publicly traded advertising technology company. Across her board service, Jennifer provides governance leadership and oversight of financial reporting, enterprise risk management, capital allocation, internal controls, and strategic transformation initiatives, and works closely with CEOs and executive teams to support long-term value creation and organizational scale. Jennifer previously served as Chief Financial Officer for global and high-growth organizations including 2K (Take-Two Interactive Software), the Golden State Warriors, NBCUniversal, and Telemundo. In these roles, she led financial strategy, capital planning, and organizational scale, and partnered with executive leadership and boards of directors during periods of significant growth and operational complexity. She began her career at Ernst & Young and brings the perspective of both enterprise operator and fiduciary to her board work. Jennifer is passionate about governance excellence, leadership development, and supporting organizations as they scale and evolve.



Hope Cue

HC Global Business Solutions, Executive Director

Hope Cue, CPA, is one of the founders of ISFFA and currently the Executive Director of HC Global Business Solutions, with over 15 years of experience as a Controller across industries including manufacturing, construction, services, nonprofit, and retail & wholesale. Prior to joining HC Global, Hope was part of the Asset Management Practice at Ernst & Young in Los Angeles and previously served as a partner in the audit practice of an accounting firm in Metro Manila, Philippines. He was also a Past President of the Philippine Institute of Certified Public Accountants, Isabela Chapter.



Diana Estrada

Los Angeles County Metropolitan Transportation Authority, Senior Executive Officer, Finance

Diana Estrada is the Senior Executive Officer, Finance of the Los Angeles County Metropolitan Transportation Authority (LA Metro). LA Metro has a budget of 9 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



Daniel Galeon

Equitable Advisors, Regional Vice President

Dan Galeon is Director, Head of Platforms Governance at Robinhood, leading governance across Customer Care, Customer Trust & Safety, and Financial Crimes. He focuses on protecting customers at scale by embedding safety into products, operations, and support systems from the start. His work spans platform risk, including AI, informed by a background in institutional finance and experience across brokerage, digital assets, and payments. He has worked across the U.S., U.K., Europe, and Asia, advising senior leadership and boards on scalable, practical risk solutions. He is an adjunct professor of cybersecurity at Yeshiva University and is active in Filipino American and U.S.–Philippines initiatives through FYLPRO, P.U.S.O. Foundation, and the International Society of Filipinos in Finance and Accounting. He earned his BA with Honors from the University of California, Berkeley, and his MBA from the Yale School of Management.



Marylou Garcia

ERA Group - Los Angeles, Global
Enterprise Partner

Marylou Garcia is the Global Enterprise Partner for ERA Group in Los Angeles and leads ERA's LA division. ERA Group is a worldwide leader in cost efficiency and performance-based margin improvement. With decades of experience advising senior executives across diverse industries and 18 countries, she specializes in identifying opportunities to enhance operational efficiency, strengthen financial performance, and create measurable business value. Marylou is also an angel investor. She mentors female and minority founders globally, advising them on capital readiness, fundraising strategies and the key operating and financial frameworks to make their companies investable. A graduate of The Wharton School, Marylou combines financial expertise with a collaborative, results-driven approach that has earned the trust of business leaders seeking practical strategies for long-term value creation. She is deeply committed to

developing future leaders through mentorship and community service. She served on the Board of the National Association of Women Business Owners–Los Angeles (NAWBO-LA), chaired the International Society of Filipinos in Finance & Accounting (ISFFA), and currently serves of the board of Parishioners Federal Credit Union and chairs the Supervisory Committee. Beyond her professional accomplishments, Marylou is deeply committed to empowering the Filipino community through mentorship, service, and leadership. She is dedicated to developing the next generation of finance and accounting professionals while fostering a culture of excellence, collaboration, and giving back. Marylou believes that leadership is not defined by title or position, but by the lives we influence, the opportunities we create for others, and the legacy we leave behind.



Andrew Guerrero
Adelfia LLC, Senior Manager

Andrew Guerrero, CPA, is a Senior Manager at Adelfia LLC and a seasoned accounting professional with more than 13 years of experience across auditing, SOX compliance, accounting, tax, and consulting. His career spans both public accounting and industry, giving him a well-rounded perspective on complex financial environments. Andrew has worked extensively with governmental agencies, not-for-profit organizations, and higher education institutions, building a diverse and adaptable skill set. He earned his graduate degree with Distinction from the Keller Graduate School of Management at DeVry University and holds a bachelor's degree from the University of Central Florida. A dedicated leader, Andrew is passionate about mentoring the next generation of professionals, equipping college students and young professionals with the guidance and practical insights needed to navigate their careers confidently. Andrew is highly engaged in the accounting and finance community through a range of leadership roles. He currently serves as President of the International Society of Filipinos in Finance and Accounting (ISFFA), a role he has held across multiple terms since 2017 after progressing through prior leadership positions. In this capacity, he leads initiatives focused on mentorship, leadership development, and community impact, including national

conferences, mentorship programs, and scholarship efforts supporting students in the Philippines. Since 2023, Andrew has been actively involved with the Illinois CPA Society (ICPAS), where he currently serves as Chair of the Young Leaders Advisory Council. He has led career-focused presentations for high school students, moderated professional conferences, and contributed to industry publications and media initiatives. Beyond his professional work, Andrew is committed to service and education. He regularly volunteers as a judge for DECA competitions and supports national initiatives such as the AICPA's Business Professionals of America conference as a resume reviewer. His leadership and contributions have been recognized with several honors, including being named to the 2026 Forbes Best-In-State CPAs list and receiving the Illinois CPA Society's 2025 Joshua D. Lance Young Leadership Award. Driven by a passion for mentorship and community impact, Andrew remains dedicated to making a meaningful difference in both the personal and professional lives of those he serves.



Joe Guintu

Business Executive, Board member,
Filmmaker, Actor, and Speaker

Joe Guintu is a business executive, nonprofit board member, filmmaker, actor, and speaker whose career spans more than 20 years across consulting, technology, governance, entertainment, and social impact. The son of Filipino immigrants, Joe has held leadership roles at Deloitte, Salesforce, and Tenable, where he led AI Governance. Throughout his career, he has advised Fortune 500 companies and global brands—including Google, Apple, Sony, The Walt Disney Company, Paramount Pictures, Major League Baseball, and The Recording Academy—on governance, risk, compliance, and emerging technologies. Joe serves as Treasurer and a member of the Board of Directors of Angel City Sports and is a passionate advocate for disability inclusion following a spinal cord injury caused by surfer's myelopathy in 2007. His work extends into entertainment, where he appeared in Sony Pictures Animation's *GOAT*, had recent film work screened at the Cannes Film Festival, and serves as the face of Disneyland's Accessibility Guide. As a speaker, Joe has delivered keynote presentations for corporate, university, and nonprofit audiences, including ISFFA's 2017 Holiday Gala. He is honored to return for the 2026 ISFFA National Conference and is passionate about advancing Filipino representation in leadership, business, entertainment, and social impact.



Beverly Ilagan

Ernst & Young LLP, Managing Director, Financial Accounting Advisory Services

Beverly Ilagan is a Managing Director 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 through transactions such as mergers and acquisitions and initial public offerings. 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 and assists 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.



Malve Ildefonso

BDO, Principal

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 25 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.



Kathy Lai

ISFFA National Executive Board Chair & Founder

Kathy V. Lai is a distinguished finance and accounting leader and a dedicated advocate for advancing the Filipino professional community. She currently serves as the National Executive Board Chair of the International Society of Filipinos in Finance and Accounting (ISFFA), where she leads national initiatives focused on mentorship, leadership development, and expanding opportunities for Filipino and Filipino-American professionals across the United States. Kathy is the California Market Leader at Crowe, a top public accounting and consulting firm, where she is responsible for driving the

strategic growth and performance of the firm's California operations—its largest market contributing to firmwide revenue. She also manages the Orange County office and is a recognized leader within Crowe's Government and Public Sector practice in California, advising public sector clients on complex financial and operational matters. In addition to her client and market leadership roles, Kathy serves on the Executive Council for Women Leading at Crowe, where she helps advance initiatives focused on developing and supporting women leaders across the firm. She is also actively involved with the Crowe Foundation, reflecting her ongoing commitment to community impact and corporate responsibility. Kathy's leadership and contributions have been recognized through her selection as a recipient of the Filipina Women's Network (FWN) Global 100 Award, honoring her as one of the most influential Filipina women leaders worldwide. Through her professional and community leadership, Kathy is deeply committed to empowering the next generation, fostering inclusion, and elevating the visibility and impact of Filipino professionals in finance and accounting.



Liezl Malabanan
CLA LLP, Principal

Liezl Malabanan is a Principal at CLA LLP and a licensed Certified Public Accountant in the State of California, with over 20 years of experience in public accounting. She specializes in financial statement audits for higher education institutions and nonprofit organizations. Prior to joining CLA, Liezl served as a Managing Director at KPMG, where she led complex audit engagements. She is also a dedicated educator, having served as an instructor within the firm, delivering training on auditing standards, accounting updates, and emerging issues. Liezl began her career with SGV & Co. and is a graduate of the University of Santo Tomas. She is passionate about delivering high-quality assurance services, building strong client relationships, and mentoring professionals in the field.



Mia McLeod

McLeod & Associates, President

At the age of 22, freshly graduated from UC Berkeley, Mia McLeod launched what would later become McLeod & Associates. Over twenty years later, her passion for serving others remains as strong as ever, if not stronger. Mia's core philosophy is straightforward: service should be so outstanding that clients naturally share their experiences. We aim to nurture, motivate, and provide meaningful value in all our endeavors. This mindset, which transforms clients into lifelong "Raving Fans," is more than a slogan; it is the foundation of everything McLeod & Associates stands for. This is why the company prioritizes a People First approach over profit, a strategy that has consistently resonated throughout the years. It also led to Mia receiving national acclaim in 2008, when the National Association of REALTORS® and REALTOR® Magazine honored her as one of their "30 Under 30" recipients at age 25. Beyond her work in real estate and mortgages, Mia has earned a reputation as a trusted community asset. She previously shared her knowledge on Channel 18's KSCI show 'The Real Estate Buzz,' collaborating with Giselle Tongi of Kababayan Today to guide viewers through real estate and mortgage developments until the program concluded in 2017. Her dedication to the community also extends to philanthropy; she supports Patriots & Paws, an organization aiding U.S. veterans and active-duty military personnel, as well as Gawad Kalinga (GK), which focuses on eradicating poverty worldwide. For Mia, business has always been about more than just deals. It's about people. She feels most thankful for her faith, her family, a playful husband, three wonderful sons, and the supportive community around them.



Angel Naval
MGO CPAs, Partner

Angel Naval is an Accounting and Advisory Services Partner at MGO CPAs, where she helps organizations bring clarity, structure, and insight to their financial frameworks. A strategic financial leader and trusted advisor, she specializes in technical accounting, financial reporting, budgeting and forecasting, cashflow management, financial due diligence, and operational and outsourced accounting. Known for her thoughtful, collaborative approach, Angel equips leadership teams with the tools and perspective they need to navigate complexity and drive sustainable growth. Widely recognized for her leadership and impact within the profession, Angel has been named a Minority of Influence in CPA (Los Angeles Business Journal, 2021), a Women to Watch Award Nominee (CalCPA, 2023), and most recently a Woman of Influence in Accounting (Los Angeles Business Journal, 2025). Angel is deeply committed to uplifting Filipino professionals in finance and accounting, championing ethical leadership, and advancing mentorship, education, and community service. She believes in empowering Filipinos around the world to reach leadership excellence, and she works to expand opportunities for representation, growth, and cultural pride across the profession. Outside of work, Angel is a wife and mother of two daughters, an avid traveler, and a marathon runner.



Gemma Nibungco
MGO CPAs, Partner

Gemma Nibungco is a tax partner with MGO based in Southern California. With nearly 20 years in public accounting, Gemma serves large clients in various industries, including REITs, multi-tiered real estate partnerships, and multistate corporations. She is especially proud to leverage her significant experience in M&A transactions, helping to structure complex deals and providing succinct consulting throughout the lifespan of your company. Prior to joining MGO, Gemma worked for a Big Four accounting firm.



Adrian Pangilinan

Goldman Sachs , Vice President -
Private Wealth Management

Adrian is a Vice President at Goldman Sachs within Private Wealth Management. He earned his B.S. in Mathematics from Rensselaer Polytechnic Institute. Adrian also sits on the Junior Board for Partnership With Children.



Jennifer Roan

Adelfia LLC, Partner

Jennifer Santos Roan, CPA, is one of the Founding Partners of Adelfia LLC. Adelfia LLC is a minority and women owned business enterprise that provides assurance, advisory, accounting, tax, and information systems review services. Since 11/11/11, with Jennifer as one of its 3 founders, the firm has grown to its current 5 partners (all of whom happens to be Filipina!) with 45 full-time employees. In July 2024, Adelfia LLC formed Randolph 700 Alliance Team, Inc., its offshore firm in the Philippines, currently with 16 employees. Prior to founding Adelfia LLC, she started her career at SyCip, Gorres, Velayo & Co. (Manila, Philippines) (member firm of Ernst & Young) as a staff auditor, and continued as a staff accountant in Belshaw Brothers, Inc., one of the leading manufacturers of bakery equipment located in Seattle/Auburn, Washington. She relocated to Chicago and worked at another local Filipino CPA firm since November 1993, and became a Partner in January 2006. She has over 35 years of experience in financial audit, compliance examination, consulting, and tax and accounting services. Jennifer graduated Cum Laude from the Philippine School of Business Administration, Quezon City, with a degree in Bachelor of Science in Business Administration, Major in Accounting. She passed the Certified Public Accountant (CPA) licensure examination in the Philippines in November 1988, younger than the required age to be granted a license. Before Jennifer could obtain her

Philippine CPA license, their family migrated to the United States in May 1989. Within a year, she took the Uniform CPA Exams and passed all parts in first attempt. Jennifer is a licensed CPA in Illinois and Indiana. Jennifer's professional affiliations include being a member of the American Institute of Certified Public Accountants, Illinois CPA Society (ICPAS), National Council of Philippine, American, Canadian Accountants (NCPACA), Philippine CPAs of Greater Chicago (PCPA), and International Society of Filipinos in Finance and Accounting (ISFFA)-Chicago Chapter. She was one of the founding officers of ISFFA-Chicago Chapter. Currently, Jennifer is a member of the ICPAS Scholarship Review Committee, NCPACA Regional Vice President-Central, and PCPA Foundation Treasurer. She coordinates Adelfia's participation in the ICPAS annual CPA Day of Service, which is a flexible opportunity for accountants to help the community by volunteering. Jennifer spends her free time watching movies at home with her lifetime crush, ever-supportive, and sweet husband, Oliver.



Benel Se Liban

JBC Group LLC, Managing Partner

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 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; 2025 Outstanding Women of Citi Club and 100 Outstanding Agnesians Awardee given by St. Agnes Academy during its 2012 Centennial Celebration. Benel is a proud wife and mother.



Michael Sudjati

CEO & Managing Partner, AGO (Anchored Global Office)

A long, long time ago, in a galaxy far away, Michael was the first scholarship recipient of PASCPA which was the genesis organization to ISFFA. Michael launched his career with almost a decade at KPMG Los Angeles, then spent the past 15 years as a CFO, COO, Angel Investor and Board Advisor for public, private companies & non-profit organizations. Along the way, Michael founded a handful of companies and is currently the CEO & Managing Partner for AGO (Anchored Global Office) which is an outsourced Finance, Accounting & IT Consulting firm with team members here in the US and the Philippines. He strives every day on bringing real Stewardship to all of his team members and client partners.



Mary Tee

Vice President and Controller, Princess Cruises

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.



Angelica Tolentino

Vialto Partners, Senior Manager

Angelica Tolentino first joined the International Society of Filipinos in Finance and Accounting (ISFFA) in 2012 as a student, only six years after migrating to the United States. What she found was more than a professional network—it became a community that supported her transition from student to young professional, and eventually into leadership. ISFFA played a pivotal role in shaping her confidence, career path, and sense of belonging within the finance and accounting profession. Angelica is a Senior Manager at Vialto Partners, leading operations and reporting for global mobility programs that support a global technology client. She is known for her people-first leadership style, operational excellence, and commitment to building high-performing teams while developing future leaders. Having served the community in various mentorship and

leadership capacities across Ascend, Toastmasters International, Rotary International, and ISFFA, Angelica is passionate about empowering the next generation of Filipino finance and accounting professionals. Her leadership philosophy combines operational excellence with a deep commitment to mentorship, collaboration, and service. Angelica is honored to serve as President of the ISFFA SoCal Chapter and is committed to helping the next generation of Filipino finance and accounting professionals thrive through leadership, mentorship, and community.



Adrian Verueco

myCIO Wealth Partners, Partner and
Chief Financial Officer

Adrian was born and raised in the Philippines and studied Bachelor of Science in Accountancy at San Beda University in Manila. After working for a few years with Punongbayan & Araullo, a local public accounting firm in the Philippines, Adrian joined Ernst & Young in Philadelphia in April 2005 primarily doing audits of wealth and asset management firms. Currently, Adrian is a Partner & Chief Financial Officer (CFO) of myCIO Wealth Partners ("myCIO"). myCIO is a wealth management firm that provides investment advisory services and financial planning to Ultra-High-Net-Worth individuals and families. As of 12/31/2025, myCIO has approximately \$15 billion in assets under management with more than 900 clients (mostly millionaires and billionaires). myCIO has been ranked 9th nationally and 1st in Pennsylvania out of 42,643 nominations on the Forbes/SHOOK Research list of America's Top RIA Firms. Adrian was recognized by Philadelphia Business Journal as a CFO of the Year honoree. Adrian and his wife, Jasmin, have been investing in Filipino owned / operated businesses in the US (and the Philippines) to help promote Filipino food representation in America. Adrian & Jasmin do their philanthropic commitments through Verueco Family Foundation, a 501c3 registered charitable organization that provides resources to students and educational institutions and entrepreneurs in the Philippines.



Jess Villarina

Scotiabank, Director and Head of Global Transaction Banking Sales, U.S

Jess Villarina is a seasoned banker and treasury sales executive with more than two decades of experience spanning corporate banking, treasury services, and relationship management. Operating in a \$1 trillion global transaction banking industry, he has built a distinguished career advising large multinational corporations on global payments, liquidity management, working capital, and trade finance. Jess currently serves as Director and Head of Global Transaction Banking Sales, U.S., at Scotiabank in New York, where he leads a sales organization driving strategic growth and advising large multinational corporations on global payments, liquidity efficiencies to optimizing visibility and control over their global treasury operations in more than 20+ countries. Prior to his current role, Jess held a series of senior leadership positions across corporate and transaction banking organizations in New York, London, and Hong Kong. Jess began his corporate banking career through a global management training program at Bankers Trust (now Deutsche Bank), where he developed a strong foundation in international banking, corporate finance, and relationship management—skills that continue to shape his career and leadership philosophy today. Jess was also the co-founder and former Chairperson of Collaborative Opportunities for Raising Empowerment (CORE), Inc., a New York-based 501(c)(3) nonprofit organization dedicated to empowering young professionals through networking, leadership development, and community engagement. Under his leadership in 2004, CORE Inc helped secure the illumination of the Empire State Building in the colors of the Philippine flag as one of the organization's most notable achievements—a landmark tribute recognizing the contributions of Filipinos and Filipino-Americans to the cultural, economic, and social fabric of the United States. Today, Jess continues to combine his passion for professional excellence and community service, serving as a mentor and leader dedicated to helping his community and various organizations, to achieve their fullest potential.



Edith Winterhalter

California State University Northridge, Associate VP
for Budget & Strategic Business Operations

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.



Jam Yap

BDO, Partner

Jam is an Audit Partner at BDO in their Orange County office in California with over 20 years of public accounting experience. She has significant experience serving manufacturing and distribution companies, retail, restaurants, service industries and nonprofit, among others. Her clients include both public and privately held companies, including audits of internal controls over financial reporting. With her diverse experience, Jam is a trusted advisor to her clients. Jam currently serves as an audit committee member for Habitat for Humanity of Orange County. She also leads the BDO Orange County office's Counts program, focused on increasing charitable giving and volunteerism across the office.



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2026 ISFFA Recognition Awards & Scholars

ISFFA 2026 Awards:

1. Champion in the Spotlight Award

Awardees:

- Nino Jefferson Lim, Chief Executive Officer, Island Pacific Supermarket

Description: Honors a distinguished business leader who has been a strong advocate and supporter of ISFFA, contributing to its growth, visibility, and continued success.

2. Legacy of Excellence Award

Awardees:

- Marialyn S. Labastilla
- Katherine Villanueva Lai
- Malve Peralta Ildfonso
- Edith Tijamo Winterhalter
- Mailo Lagman Garcia
- Daniel Galeon

Description: Long time leader in ISFFA and the Filipino Community. Recognizes exceptional achievement and influence in the finance and accounting profession. Honors a distinguished Filipino leader whose career has created a lasting impact in finance, accounting, and the Filipino community over decades.

3. Leadership in the Spotlight Award

Awardees:

- Adrian Pangilinan
- Andrew Guerrero

Description: Celebrates a chapter leader who is currently making significant contributions and inspiring others in the profession.

4. Beacon of Opportunity Award

Awardees:

- Arvin Floresca
- Gilda Priebe

Description: Recognizes members whose generosity has opened doors to educational opportunities through scholarship support. This award honors individuals who invest in the next generation of Filipino finance and accounting professionals, empowering students to pursue their dreams and build a brighter future.

5. Guiding Light Award

Awardees:

- Maria Fides Balita
- Carmelita O'Neil

Description: Recognizes a mentor who has served as a guiding light, inspiring and supporting the next generation of Filipino professionals.

6. ISFFA Scholarship Award

Awardees:

- Cedric Valencia
- Brandon Doronila

Description: In recognition of academic promise and achievement. May this award encourage the pursuit of excellence, leadership, and service to others.

ISFFA National Conference Sessions

2026 ISFFA National Conference
(Keynote Speaker)
The Courage to Dream



Maria Hollandworth
Former President and COO of
El Pollo Loco

Moderator:
Kathy Lai
ISFFA NEB, Chair
Crowe, California Market Leader



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20 Years in the Spotlight: Lights, Leadership, Legacy.
Filipino professionals taking center stage in finance and accounting.
August 14-15, 2026 @ CITY CLUB LOS ANGELES



www.isffa.org

Gala Night
Keynote Speakers



Nino Jefferson Lim
Island Pacific Market, Founder



Hon. Adelio Angelito Cruz
Philippine Consulate, Consul General

Moderator:
Benel Se-Liban
ISFFA Founding President
JBC Group LLC,
Managing Partner



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Achieving Filipino Representation



Jennifer Cabalquinto
IMG Academy,
Independent Director &
Risk Committee Chair
Playboy, Inc.,
Independent Director



Daniel Galeon
Robinhood,
Head of Platforms



Joe Guintu
Actor, Arise Artist Agency

Moderator:
Angelica Tolentino
ISFFA Social President
Vialto Partners, Senior Manager



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Center Stage
Audit, Tax & Advisory Updates



Jam Yap
BDO Assurance
Partner



Beverly Ilagan
Ernst & Young, Managing Director,
Financial Accounting Advisory
Services



Gemma Nibungco
MGO, Tax Partner

Moderator:
Kathy Lai
ISFFA NEB Chair
Crowe, California Market Leader



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Executive Center Stage:
Pathways to the C-Suite

Mary Tee
Princess Chua, VP Controller

Diana Estrada
LA Metro, Sr Executive Officer Finance

Jess Villarina
Scotiabank, Global Banking and Markets Director and Head

Hope Cue
HC Global Business Solutions, Executive Director

Benel Se-Liban
JBC Group LLC, Managing Partner

Moderator:
Adrian Pangilinan
ISFFA New York President, Goldman Sachs, Vice President Private Wealth Management

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Legacy in Spotlight
From Success to Significance Accounting

Edith Winterhalter
CSUN, Associate VP for Budget and Strategic Business Operations

Marylou Garcia
ESEA Group, Los Angeles, Global Enterprise Partner

Benel Se-Liban
JBC Group LLC, Managing Partner

Liezl Malabanan
ISFFA Board Member, CLALP, Principal

Moderator:
Liezl Malabanan
ISFFA Board Member, CLALP, Principal

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The Next Act:
Driving your career in Public Accounting

Malve Ildefonso
BDO, Partner

Jennifer Roan
Adella LLC, Partner

Angel Naval
MSO CPAs, Partner

Moderator:
Andrew Guerrero
ISFFA Chicago President, Adella LLC, Senior Manager

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Wealth in Focus:
Building an Entrepreneurial Mindset

Mia McLeod
The McLeod Team, President and CEO

Adrian Verueco
myCIO, Partner & CFO

Michael Sudjati
Anchored Global Office, CEO/Managing Partner

Benel Se-Liban
JBC Group LLC, Managing Partner

Moderator:
Benel Se-Liban
JBC Group LLC, Managing Partner

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Message from the **Founder of ISFFA**



Twenty years ago, ISFFA was founded on a simple but bold belief that Filipino finance and accounting professionals could lead, compete, and make a meaningful difference in an increasingly interconnected world. Our vision was not merely to establish another professional organization, but to build a community that develops leaders, creates opportunities, nurtures lifelong learning, and empowers Filipinos to excel globally while remaining grounded in integrity, service, and faith.

Today, as we celebrate our 20th Anniversary, that vision has become a shared legacy. Filipino professionals now serve with distinction across the globe, and ISFFA has been privileged to encourage, connect, and inspire many along that journey.

This milestone belongs to everyone who made it possible. We honor the late Washington SyCip, whose visionary leadership and unwavering commitment to developing Filipino professionals continue to inspire us. We also celebrate every past president, officer, board member, volunteer, member, sponsor, and partner whose dedication and generosity have shaped ISFFA over the past two decades.

On a personal note, I am deeply grateful to my family for their unwavering love, encouragement, and sacrifices, and to the mentors, friends, and colleagues who believed in this vision from the very beginning. No founder builds a lasting legacy alone, and I am humbled to share this milestone with all who have walked this journey together.

As we begin our next twenty years, may ISFFA continue to open doors where none existed, cultivate leaders of character, embrace innovation, and create opportunities for future generations of Filipino professionals. Let us measure success not only by our accomplishments, but by the lives we uplift, the communities we serve, and the legacy we leave behind.

To our 2026 National Board and Officers, thank you for carrying this mission forward. Lead with humility, courage, excellence, compassion, and integrity. Build boldly upon the foundation of the past, while inspiring an even brighter future.

May God continue to bless ISFFA and all who dedicate their talents to excellence, service, leadership, and one another.

Maria Benel Corazon G. Se, CPA

Founding President

International Society of Filipinos in Finance and Accounting (ISFFA)

A handwritten signature in cursive script, reading "Benel G. Se".



The more diverse our backgrounds, the deeper our insights.

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**CONGRATULATIONS
ISFFA ON 20 YEARS
OF AMAZING
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Michael & AGO are incredibly proud of how ISFFA has continued to showcase all the talents and potential Filipinos showcase around the globe.





ISFFA NEB Officers

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Vice Chair	Daniel Galeon	Robinhood
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Treasurer	Lyn Labastilla	BCAWR LLP
Member	Liezl Malabanan	CLA LLP
Member	Joy Mayor	MWD of Southern California
Member	Beth Hacia	BGH
Member	Mailo Lagman	St. Joseph Center
Member	Cecile Pineda	Southern California Edison
Member	Diana Estrada	LA Metro
Member	Arvin Floresca	Multiplan
Member	Gemma Nibungco	MGO LLP
Member	Jam Yap	BDO
Member	Andrew Guerrero	Adelfia LLC
Member	Malve Ildefonso	BDO

Incoming Officers National Board Executive (NEB)

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Vice Co-Chair	Jam Yap	BDO
Vice Co-Chair	Liezl Malabanan	CLA LLP
Secretary	Angel Naval	MGO CPAs
Treasurer	Lyn Labastilla	BCAWR LLP
Member	Mailo Lagman Garcia	St. Joseph Center
Member	Diana Estrada	LA Metro
Member	Gemma Nibungco	MGO LLP
Member	Kathy Lai	Crowe LLP
Member	Andrew Guerrero	Adelfia LLC
Member	Beth Hacia	BGH
Member	Marian De Guzman	PWC
Member	Adrian Pangilinan	Goldman Sachs
Member	Kiko Sarmiento	Baker Tilly
Member	Daniel Galeon	Robinhood

Message from the **Incoming Chair of National Executive Board**



Welcome to the 2026 ISFFA National Conference, a celebration of a truly meaningful milestone: Twenty Years in the Spotlight. Guided by this year's theme, Lights. Leadership. Legacy., we gather in recognition of the extraordinary journey of ISFFA and the enduring influence of Filipino professionals in finance and accounting here and abroad.

Over the past twenty years, ISFFA has illuminated paths of opportunity for students, uplifted the next generation of professionals, and fostered leaders whose impact continues to shape our industry. These accomplishments stand as a testament to the excellence, perseverance, and integrity that are at the heart of the Filipino professional community. Yet while today is a moment of celebration, it is also a call to the future. Our profession continues to evolve, requiring leadership that is thoughtful, ethical, and forward-looking. This conference is a reflection of that promise.

May our time together inspire fresh ideas, deepen meaningful connections, and strengthen our shared commitment to service and excellence. We extend our heartfelt appreciation to our sponsors, National Executive Board, Chapter Officers, speakers, members, volunteers and guests, whose dedication has made this conference and this milestone celebration possible.

Malve Ildelfonso

BDO, Principal

A handwritten signature in black ink that reads "Malve Ildelfonso".



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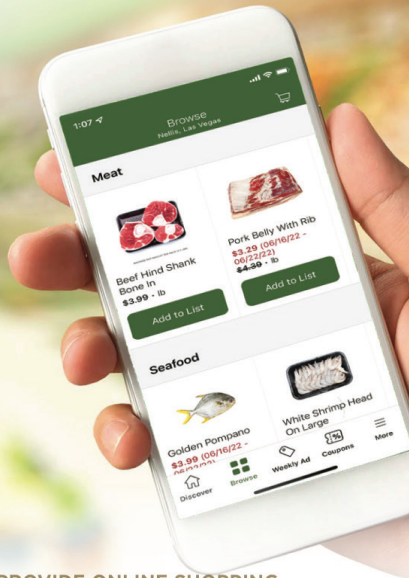
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VP of Mentorship (Co-Chair)	Erica Ong
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VP of Student Affairs (Co-Chair)	Brandon Doronila
VP of Student Affairs (Co-Chair)	Cedric Valencia
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- Prepare Financial Statements
- Track Purchases & Payables
- Manage Billing & Collections
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- Report Fixed Assets & Inventory

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- Set Up Chart of Accounts
- Classify, Summarize, & Record Transactions
- Prepare & Post Accrual Journal Entries
- Perform Monthly Reconciliations
- Maintain Accounting Files & Records

FINANCIAL STATEMENT PREPARATION AND ANALYSIS

- Prepare Financial Statements, including Footnotes
- Perform Pre-Audit Procedures
- Coordinate with Internal or External Auditors

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- Prepare Vendor Invoices for Approval
- Process Payments via Checks, ACH, Wire Transfers, & Credit Cards
- Address Vendor Inquiries/Prepare Vendor Reports

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- Prepare Revenue & Receivable Reports

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- Maintain Fixed Assets & Inventory Reports

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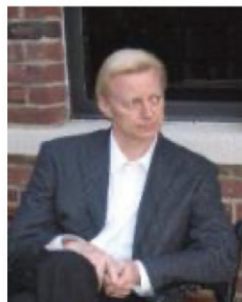
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Congratulations to ISFFA on 20 incredible years! Thank you for your dedication to education, inspiring and shaping generations of accountants. Wishing you many more years of growth, excellence and lasting impact across the nation.



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Angel Naval, Conference Co-Chair
Malve Ildefonso, NEB
Lyn Labastilla, NEB
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