IEEE Financial Summit
Tuesday December 7, 2021
12 pm PST - Live Interactive Session
Live Stream Seattle Washington

Speakers
12:00 pm PST IEEE Announcements
12:03 pm PST Introduction of speakers
12:05 pm PST Todd Becker, President and Founder of BlueStreak IoT (Blockchain, Cloud, IoT strategies)
12:30 pm PST Ana White, EVP Chief People Officer at F5 Networks (Importance of Human Capital Journey of F5)
12:55 pm PST Diana Djuranovic, Senior Financial Professional Edward Jones (Put your retirement plan to work)
1:20 pm PST Karen Tenenbaum, Tax Attorney at Tenenbaum Law (Telecommuting and IRS Collection Issues)
1:45 pm PST Joel Murray, Attorney at JFM Law (Consumer Protection: Case Study)
2:10 pm PST Luke Norman, Enterprise Account Executive (Pros and cons of Cryptocurrency)
2:35 pm PST Arika Larson, Founder and CEO, Women Be Wise, Family Wealth Services (Retirement planning)
3:00 pm PST Travis Simpkins, Ph D Founder and CEO muGrid Analytics (Cryptocurrency financial strategies)
3:25 pm PST Blaine Millet, Author (Financial Business Strategies)
4:15 pm PST Pamela Hamblin, K&A Engineering Consulting (Financial issues facing Utility Companies)
4:40 pm PST Yoko Okano, Founding Partner at First Row (the Importance of Venture Capitalists)
5:05 pm PST Closing Mike Brisbois, IEEE host and Moderator
5:10 pm PST SWAG, Salute to the Speakers and Entertainment

Todd Becker, President, Founder
BlueStreak IoT

Todd’s nearly 30-year career has focused on helping companies successfully “surf” the Three Waves of IT that Michael Porter (et al) defined as the major transformative forces of information technology driving business productivity since the 1960s. As a successful entrepreneur, management consultant, C-level exec and venture capital investor, Todd has successfully launched, grown or “digitally transformed” numerous businesses, many based on smart, connected device architectures, including mobile, cloud, IoT and Blockchain technologies.

Todd’s extensive technology experience covers corporate development, business planning, market strategy, intellectual property, product development, operations, IT, and business finance (including many successful private-equity capital raises, acquisitions, and IPOs) as a Board
Member, President, COO, CTO, CIO, and CFO, including his latest new venture: BlueStreak IOT, which sits at the center of information from sensors, devices, networks, and software that combine to deliver valuable, actionable data and automate critical functions across retail, hospitality, entertainment, health & fitness, real estate, and other commercial venues.

Graduate of BSEE Worcester Polytechnic Institute, Massachusetts Institute of Technology MSEE and MIT Sloan School of Management

**Topic: Mobile, cloud, IoT and Blockchain technologies. What are they and why are they important in today’s financial world?**

Ana White, Executive Vice President and Chief People Officer for F5

Ana joined F5 in 2018 as Executive Vice President and Chief Human Resources Officer to lead the company’s people practices and professional growth programs, recruiting, diversity & inclusion, total rewards, organizational development, employee advocacy initiatives and environmental social and governance (ESG) programs.

White comes to F5 from Microsoft, where she led global HR teams for over 18 years across multiple business units. Most recently, White acted as General Manager, Human Resources for Microsoft’s Business Development, Finance, HR and Legal organizations with responsibility for their teams’ HR strategy, talent management, diversity & inclusion, and organizational capability as well as HR Business Insights across Microsoft. Prior to that, White led HR for the Marketing & Consumer Business organization. Prior to Microsoft, White was a Compensation & Benefits Consultant at Willis Towers Watson.

White holds a B.S. in Mathematics from Seattle University, and serves on the Board of Childhaven. She is a Governance Fellow with the National Association of Corporate Directors (NACD). She is married with three children and enjoys traveling, reading, hiking and playing tennis.

*Please join Ana White, EVP and Chief People Officer, to hear about the journey of F5 and how living a human first and high-performance culture can lead to great business results. People are companies’ most important asset and F5 has doubled down on their culture and ways of working over the past four years leading to company success. It is important that companies and managers show their employees that they are valued, both for retention and to foster strong engagement and performance.*

**Topic: The importance of Human Capital – The Journey of F5**
Diana Djuranovic, Senior Financial Professional Edward Jones

Diana helps clients achieve financial goals through a personalized investment approach. Put Your Retirement Plan to Work is a presentation designed to educate employees about the importance of saving for retirement and enrolling in their employer's retirement plan. Participants will learn the importance of saving for retirement now, how to save through employer-sponsored retirement plans and other tax-advantaged options for building retirement savings.

I am a dedicated, female financial advisor with over 15 years in a financial industry working on helping my clients achieve their financial goals. While I help people retire often, I recognize that you only retire once, so I make sure that people that are switching jobs and careers are still able to continue saving for retirement.

I am committed to a long-term investment philosophy that helps protect my client's assets and their futures. I emphasize on quality, diversification and a strategic asset allocation aligned to the client's values and important life events. I love our beautiful Northwest, so I spend every free moment with my family exploring the places we have never seen before. I enjoy my son's soccer games and my daughter's golf tournaments.

**Topic: Put your retirement plan to work**

Karen Tenenbaum, Tax Attorney at Tenenbaum Law, PC

Tenenbaum Law, P.C. provides legal counsel to individuals and businesses facing IRS and NYS tax problems. Karen and her team represent taxpayers before the IRS and New York State Department of Taxation of Finance on matters such as individual and business tax audits, NYS & NYC residency audits, IRS Appeals, NYS Conciliation Conferences, voluntary disclosures, Installment Agreements, Offers in Compromise, levies and seizures, innocent spouse relief claims, and penalty abatement requests.

**Topic: Tax Issues: Telecommuting, IRS and NYS Tax Collection, Federal and NYS Trust Funds, Bulk Sales.**
Joel Murray, Attorney at JFM Law

In a constantly changing, increasingly automated and competitive economy, attorneys offering professional services must evolve and streamline their offerings to meet the ever-changing needs of clients as well as industry. Joel provides cost-effective and results-oriented legal and government relations services to businesses of all sizes and industries. A combination of creative, humble, innovative, knowledgeable, pragmatic, and transparent legal counsel is utilized to advance client goals, overcome challenges, and maximize return on investment.

Joel has a broad range of experience that includes administrative law, appeals and rulemaking, business and corporate law, consumer protection, government affairs, investigations and legislation, education, election law, employment law, litigation, local government and municipal law, real property law, tax law, trademark law, tribal law, and transportation and logistics law. Joel is detail oriented and interested in new and “emerging” industries and areas of law.


Federal agency experience includes Agriculture, EEOC, Maritime Commission (“FMC”), Congress, Customs and Border Protection (“CBP”), Trademark(s) (“PTO”), and Transportation.

Joel maintains relationships with current and former local, state and federal elected officials of all political affiliations. He has held positions on multiple pro-education political campaigns, advocated for increased funding for higher education (chairing a 30,000 person+ member organization as an undergraduate at the University of Washington, and in that capacity, lobbying both Congress as well as the WA Legislature in favor of public education), completed a legal externship and fellowship in the United States (“US”) Senate, and chaired a national legal and political organization.

In addition to his broad legal practice experience and political activities, Joel has published several academic articles in law journals and taught several continuing legal education (“CLE”) seminars.

**Topic: Consumer Protection: Case Study**

Luke Norman, Enterprise Account Executive / Solutions Architect

I’m both an Enterprise Account Executive and Solutions Architect for an Inc. 500 software company. My motto is that I will do what others won’t in order to support my family and greatly benefit the company that I work with. I have multiple years of Sales, Business, and Leadership experience and have had many great mentors along the way. I have what you’re looking for. Let’s chat!

**Topic: Pros and cons of Crypto Currency**
Jason Cavness, CEO/Founder at CavnessHR

Jason is host of The Jason CavnessHR Experience and a retired U.S. Army Officer. Bunker Labs Seattle City Leader. He is a retired U.S. Army Officer who is an INFJ HR Tech Professional who is transforming how HR is delivered to companies with 49 or fewer employees. I host The Jason Cavness Experience, where I talk to small business owners, founders and other interesting people. I also help out at Bunker Labs. Bunker Labs helps the military connected community start companies and on their entrepreneurial journey.

Jason Cavness is an INFJ retired U.S. Army officer who served for 25 years, to include 8 years as an enlisted member. He is currently CEO/Founder of CavnessHR. CavnessHR delivers HR to U.S. companies with 49 or fewer people through their HR platform along with a HR Business Partner. He hosts The Jason Cavness Experience where he talks to small business owners, founders and other interesting people. He has taken on the role of Seattle City Leader for Bunker Labs. Bunker Labs is a national nonprofit that helps to inspire, equip and connect the Military community to entrepreneurship. His personal motto is “Be Great Every Day”. He does his best to add value, help to solve problems daily and to help others become better. He has a Master’s in Human Relations from the University of Oklahoma and is SPHR certified.

Topic: Benefits of Crowdfunding

Arika Larson, Founder and CEO, Women Be Wise, Family Wealth Services

Building Firm Financial Foundations

Arika formed Women Be Wise™ after having received a number of requests from female clients interested in “doing the right thing with regard to money” but they weren't sure where to begin. They were afraid to ask questions, because they thought they should “already know this stuff”. She decided to build a resource that empowers women during every one of life's transitions; marriage, childbirth, retirement and long-term care planning, death and divorce, to learn to not only manage their finances, but to protect their families, and to plan for a secure future. Whatever your transition is... Her goal is to empower you.

Topic: Retirement Planning
Travis Simpkins, PhD Founder and CTO muGrid Analytics

Dr. Simpkins is the founder and Chief Technology Officer of muGrid Analytics. muGrid is a consulting and technology company that is focused on the design, modeling, and optimal economic operation of microgrids, batteries, and building energy loads. Working at the intersection of energy and economics, muGrid helps customers improve their energy resilience during grid outages as well as save money on their utility bills by installing distributed generation assets. muGrid also designs and operates cryptocurrency mining systems that operate using excess renewable energy, provide demand response to the electricity grid, and heat buildings using captured waste heat from mining via “Combined Heat and Computation.”

Prior to founding muGrid, Dr. Simpkins was a Senior Research Engineer at the National Renewable Energy Laboratory in Golden, Colorado, where he was the Principal Investigator and Chief Architect of the REopt energy modeling platform. Dr. Simpkins has a SM and PhD in Electrical Engineering and Computer Science from MIT, a certificate in Financial Technology from the MIT Sloan School of Management, and a BS in Electrical Engineering and Applied Physics from Case Western Reserve University.

Dr. Simpkins lives in the foothills of the Rocky Mountains - in a house heated almost entirely by Bitcoin mining - with his wife and three kids. When he’s not talking about mathematical optimization, finance, energy, or computation, he likes to ski, canoe, hike, climb mountains, and travel the world.

Topic: Cryptocurrency used as a financial means

Blaine Millet, Keynote Speaker

Author, Key-Note Speaker, Advisor...Inspiring & Helping Leaders (and Businesses) become "REMARK"able™ by being Customer Obsessed. Blaine is an Author, Nationally recognized Speaker, and President & Chief Advocate at WOM10 Word-of-Mouth on Steroids. His passion is to “Inspire and help Business Owners and Leaders build TRULY

DIFFERENTIATED companies by being Customer Obsessed, creating an army of Advocates and Marketing

Agents™ who happily do their marketing for them. This is how they become truly “REMARK”able™!

How to Create a Strategy to Build True and Complete Differentiation in any Market

One of the biggest (if not the biggest) challenge companies face today is "commoditization"...where they are chosen based on commodity factors such as price, terms, availability, etc. When this happens, companies struggle with profitability, getting the best customers (and employees), and long-term scalability. There is a way to stop playing in the commodity sandbox and set yourself apart from others so that the customer sees you as the one they want to work with and be loyal to. I’ll share the formula for how to make this happen and why building a "DIFFERENTIATION STRATEGY" should be on the top of everyone's list going into 2022 and beyond.

Topic: Business Strategies
Yoko Okano, Founding Member of First Row

Yoko is one of the Founding Partners of First Row Partners, a pre-seed venture capital firm based in Seattle and investing across North America. First Row Partners invests in enablement software for creators and emerging enterprises (API-first companies, no/low code, marketplaces and creator tools.)

Prior to founding First Row, Yoko was an active angel investor, participating and taking leadership roles with groups like Grubstakes and Seattle Angel Conference. Yoko started her early tech career at Google, working on Google Books & News before launching ebooks on Google Play. She applied the learning from the immense operational scale of Google to product-related roles at startups before embarking on the investing path full-time. Yoko also serves on the boards of IslandWood (https://islandwood.org/) and Sustain Music (https://sustainmusic.org/).

Who invests in startups and why do they do it? If you’ve been curious about early-stage investing and want to learn more, we’ll cover the who and why of investing in startups, what to look for in early-stage investments, and resources to help you get started.

Topic: The Importance of Angel and Venture Capitalist

Pamela Hamblin, K&A Engineering Consulting

Pamela is an account manager at K&A Engineering Consulting. With 24+ years in her Energy career, she has developed a vast knowledge of the many dynamics involved in delivering safe, reliable, and affordable power. Those dynamics have changed drastically over the last decade due to environmental objectives and economic impacts. Her relationships with many corporate level executives at the nation’s largest utilities and her extensive industry network connections reflect her highly influential reach in the market. These relationships represent every facet of the Energy dynamics our world currently faces.

Because of her relationships and industry experience, she is regarded as a Subject Matter Expert for safety and reliability of legacy power generation, grid stability and resiliency, energy economics, and alternative green energy resources.

Pamela has been invited as an expert speaker for respected industry conferences and has been published in numerous industry magazines. Her published work includes multiple technical papers for ASME as well as feature articles in Power Engineering Magazine and Inspectioneering Journal.

Additionally, Pamela serves as an expert panelist on the ASME Technology Advisory Panel (TAP) for the Pressure Technology group and the ASME Power Plant Cycling Executive Advisory Committee.

Topic: Financial issues facing Utility Companies
Mike Brisbois, Sr. Electrical Engineer, IEEE Consultant Network Chair

Mr. Brisbois is a Senior Electrical Engineer with design experience, project management and leadership skills. He has worked in the building, space and technology sectors. He has hosted and presented at many technical sessions and conferences. He is a technical competent leader and able to get things done. Mr. Brisbois has his Professional Engineering license in the State of Washington, Texas, Illinois, California, Oregon, Hawaii, Alaska and Missouri. His focus is on leading sustainable energy projects. He is a board member on several technical organizations.