

WOMEN IN NEUGROUP 2026 H2 MEETING AGENDA

Tuesday, September 29, 2026 (All times reflect Pacific Time)

1:00 – 1:30pm

Meet & Greet Networking

*Prologis Headquarters – Pier 1, Bay 1 (Embarcadero Waterfront),
San Francisco, CA 94111*

1:30 – 1:50pm

Welcome and Opening Remarks

Welcome to the H2 meeting of Women in NeuGroup. We'll open by welcoming members, recognizing Prologis for hosting and CNote and Seelaus for their support, and reviewing the objectives and priorities for the meeting.

Session leaders:

- Julie Zawacki-Lucci, NeuGroup
- Cat Berman, CEO, CNote Group, Inc.
- Annie Seelaus, CEO, R. Seelaus & Co., Inc.

1:50 – 2:15pm

WiNG Connection Exchange Part One

Kick off the meeting with lively table introductions and fast-moving conversations. Participants will get to know half the room, exchange perspectives and discover shared priorities, relevant experience and unexpected connections—before the shuffle continues with the other half later in the agenda.

2:15 – 3:15pm

AI Beyond the Pilot: From Experimentation to Enterprise Value

As treasury and finance teams move from isolated AI pilots to enterprise-wide adoption, new questions are emerging around governance, implementation, workforce readiness and measurable business value. Drawing on the expertise of CNote and R. Seelaus & Co. along with insights from treasury practitioners, this session will explore real-world use cases, lessons learned and the strategies leading organizations are using to scale AI successfully.

Discussion topics include:

- *AI use cases delivering measurable value in treasury and finance*
- *Prioritizing AI investments and selecting the right workflows*
- *Establishing governance, controls and responsible AI practices*
- *Preparing teams for new ways of working*
- *Applying lessons from pilots to implementation*

Session leaders:

- *Kavita Bashyam, Meta*
- *Heather Dennen, Levi Strauss & Co.*
- *Cat Berman, CEO, CNote Group, Inc.*
- *Annie Seelaus, CEO, R. Seelaus & Co., Inc.*

3:15 – 3:35pm

Breakout Discussions: AI Beyond the Pilot

Participants will break into small groups to discuss real-world AI applications, barriers to adoption and practical steps for scaling responsibly. Each table will then share its key takeaways with the full group.

3:35 – 4:00pm

Coffee Break & WiNG Connection Exchange Part Two

Participants can grab a coffee, stretch their legs and recharge before moving to a new seat. The new table groups will meet and connect through the breakout discussions during the session ahead.

4:00 – 4:55pm

The Judgment Advantage: Leadership in the Era of AI

As AI accelerates analysis and automates routine work, human judgment, trust-building and the ability to navigate organizational complexity are becoming more valuable. During this interactive session, senior treasury leaders will explore the challenges that rarely appear in a job description yet often define leadership success—from making high-stakes decisions amid uncertainty to influencing stakeholders, leading organizational change and challenging conventional thinking.

Discussion topics include:

- *Applying human judgment in an AI-enabled world*
- *Building credibility and influence with executive stakeholders*
- *Navigating organizational complexity and leading through change*
- *Balancing innovation, governance, and risk*
- *Developing the next generation of women treasury leaders*

Session leaders:

- Jennifer Bifano, Nike
- Priti Kartik, CrowdStrike
- Julie Zawacki-Lucci, NeuGroup

4:55 – 5:15pm

Breakout Discussions: The Judgment Advantage

Participants will break into small groups to explore leadership dilemmas involving judgment, influence and organizational change prompted by advances in AI. Each table will then share its key themes and insights with the full group.

5:15 – 5:30pm

Key Takeaways & Closing Discussion

We will close by summarizing key takeaways, confirming commitments and member connections, and outlining any next steps for after the meeting.

5:30 – 6:00pm

Break & Travel to Dinner

6:00 – 8:30pm

Cocktails & Dinner

Sens, 4 Embarcadero Ctr Level, San Francisco, CA 94111

*All NeuGroup meetings and engagements are conducted under the **Chatham House Rule**. By participating in the event, you agree to adhere to this standard. As a reminder, there should be no discussions or collusion with your competitors of agreements or concerted actions that may restrain competition. This includes the improper exchange of information concerning company specific current or future prices, price levels, pricing formulas, credit terms, discounts, costs, terms, or other features that can impact prices.*