



SEC Professionals Group

2019 Information Kit

The preeminent group for financial reporting professionals—learning from each other and sharing best practices.

WHO WE ARE

The SEC Professionals Group is a community of in-house professionals who actively prepare and file financial reports with the U.S. Securities and Exchange Commission. Our exclusive community now represents over two-thirds of large, public companies and also includes membership from many smaller and pre-IPO companies.

The purpose of the community is to foster communication between members on matters of common professional interest.

We are a rapidly growing, dynamic group of external reporting professionals from a diverse group of industries. Since its inception 11 years ago, membership has grown to over 10,000 members from 3,725 individual companies across 30 industries in 40 chapters.



ABOUT US

If you prepare and file financial reports with the SEC, your job is getting harder– and riskier. Challenging new accounting standards and rapidly changing SEC requirements and expectations generate a multitude of new risks and questions. The days of reaching out to your external auditor for help are long gone.

Turn to the SEC Professionals Group for practical advice and to learn from the experiences of other financial professionals.

Members of the SEC Professionals share best practices and learn from each other about:

- Practical questions
- Implementing new accounting standards
- Changing technologies
- Helpful resources and tools
- Experiences with regulators and service providers

The group meets as a national organization four times a year to discuss how members are dealing in practical terms with important issues.



Joe Howell, Co-Founder



HOW WE STARTED

It all began in the Silicon Valley in mid-2008. Joe Howell, cofounder of Workiva, was ruminating on how challenging it was for SEC reporting professionals to resolve their issues and demands with limited internal resources. He noted that when dealing with highly technical accounting or disclosure issues, a dialogue with other experienced professionals is often needed to flesh out answers.

After informal discussions with a number of reporting teams, Howell convened a meeting of SEC reporting professionals in December of 2008. The initial group of seven companies included Apple, eBay, Electronic Arts, HP, Intel, Maxim Integrated Products, and Symantec.

The stated purpose of the meeting was to provide a safe forum to discuss challenging accounting and reporting issues and to provide a resource for confidential and open discussion. The discussion, collaboration, and peer-to-peer conversation was fruitful. The group agreed to meet on a quarterly basis and to expand. HP hosted the second quarterly meeting, with a significant increase in attendance. It became clear that the SEC Professionals Group addressed an unmet need amongst reporting professionals.



WHAT WE DO

The SEC Professionals Group meets quarterly to discuss challenging issues facing financial reporting professionals, including IFRS, SEC comment letters, XBRL, changes to accounting rules, and other member-driven topic suggestions.

About the SEC Professionals Group:

- Brings professionals together in a collaborative, congenial environment
- Provides cutting-edge, practical information on highly technical, challenging reporting issues
- Helps members share case studies and hands-on experience to make on-the-job challenges manageable
- Shares technology solutions that streamline and enhance financial reporting processes
- Creates member driven committees providing advice and resources on relevant and timely topics



MEMBERSHIP IS EXCLUSIVE

The SEC Professionals Group is a members-only, invitation-only group for individuals involved in overseeing or preparing financial reports.

Meeting conversations are off the record and remain within the group.

On average, members include two or more reporting professionals per company. We encourage the entire reporting team to join.

Members attend in-person meetings at 40 local chapters around the country. Members may also participate remotely via our live webcast. Complimentary CPE credits are offered.



PROFESSIONAL CONNECTIONS

So that members may connect with each other outside of quarterly meetings, a confidential, password-protected membership directory has been created on a secure website: secprofessionals.org

Members also have the option to connect with each other via our SEC Professionals LinkedIn group.

There is no charge to join the SEC Professionals Group or to attend meetings. Our sponsors underwrite the cost of programs and events.

Added Value for Members—CPE Credits

The SEC Professionals Group offers complimentary CPE credits credits to members who attend our meetings or participate remotely in the webcast.



EVENTS

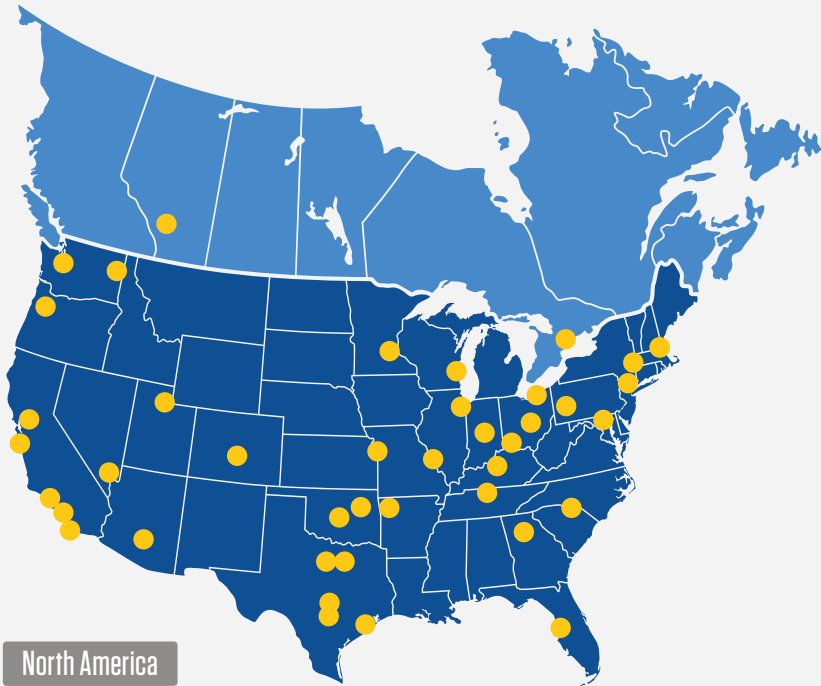
The SEC Professionals Group offers many opportunities to participate in events throughout the year, including:

- Quarterly meetings at chapter locations
- National, live webcasts
- Local chapter lunch and learn networking sessions
- Womens leadership programs
- Half day CPE programs
- Short, topic specific webinars with thought leaders and practitioners



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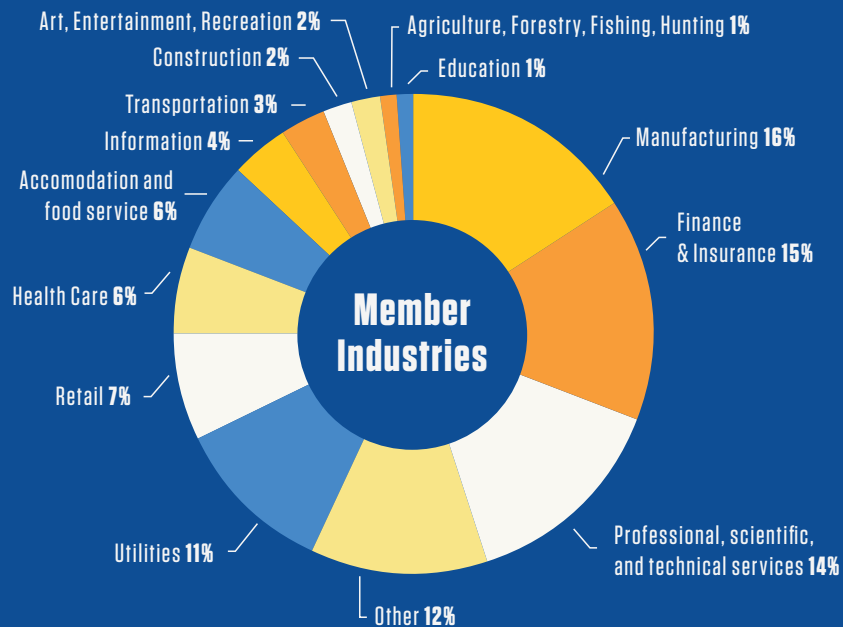
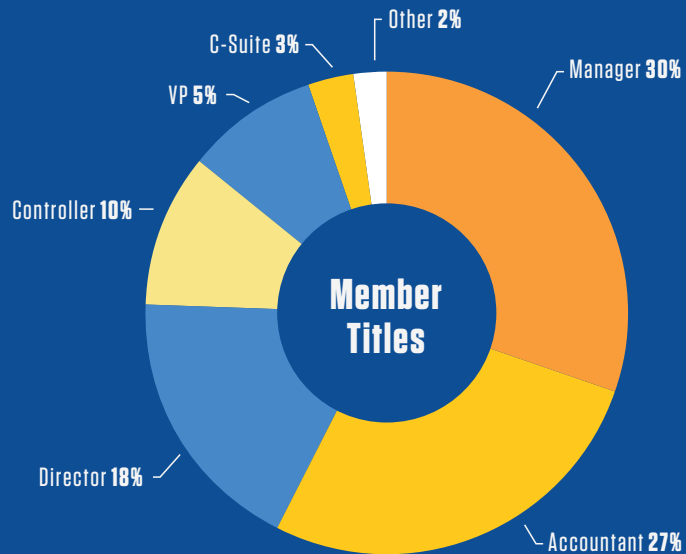
PRO GROUP



CHAPTERS

- | | |
|----------------------|--|
| Atlanta | Nashville |
| Austin | New York: Tri-State Area |
| Bentonville | Northern Virginia-Metro D.C. |
| Boston | Oklahoma City |
| Charlotte | Orange County, Calif. |
| Chicago | Phoenix |
| Cincinnati | Pittsburgh |
| Cleveland | Portland |
| Columbus | Salt Lake City |
| Dallas | San Antonio |
| Denver | San Diego |
| Fort Worth | San Francisco |
| Houston | Seattle |
| IFRS Filers—Calgary | Silicon Valley |
| IFRS Filers—Toronto | Spokane |
| Indianapolis | St. Louis |
| Kansas City | Tampa |
| Las Vegas | Tulsa |
| Los Angeles | U.K. FPI Chapter: Foreign
Private Issuers |
| Louisville | Westchester County
& Southern CT |
| Milwaukee | |
| Minneapolis-St. Paul | |

MEMBERSHIP PROFILE



VALUE PROPOSITION FOR SPONSORS

Sponsors receive the following benefits:

- Share marketing materials and/or collateral at quarterly meetings and local chapter meetings
- Invitation for sponsor representatives to attend quarterly meetings with the chapters they sponsor
- Promotional gift offering at meetings
- Logo displayed on home page of SEC Professionals Group website
- Brief description of company and services on SEC Professionals Group website
- Share expertise and content on the SEC Professionals Group website and LinkedIn
- Sponsor content may be included in quarterly newsletters
- Access to names, titles, and mailing addresses of members in chapters where they are sponsors
- Promotion may be included in quarterly newsletter
- Opportunity to host lunch or happy hour at quarterly chapter meetings



MEMBERSHIP BENEFITS SUMMARY

The SEC Professionals Group is a community of in-house professionals who actively prepare and file financial reports with the U.S. Securities and Exchange Commission.

The purpose of the community is to foster communication between members on matters of common professional interest, including:

- Collaboration
- Shared learning
- Intellectual capital
- Cutting-edge technology and information
- Building professional communities

The SEC Professionals Group is the preeminent group in the country providing these resources for in-house financial reporting professionals.

Sponsor contributions:

Organizations who will be considered for sponsorship are those that have the ability to advance the mission of the SEC Professionals Group, i.e., membership growth, industry expertise, and financial and in-kind support, including hosting meetings.

Sponsors will actively promote the SEC Professionals Group to colleagues.



COMMITTEES

The purpose of our committees is to provide members with an opportunity for more in-depth discussion on important topics. They are member-driven and provide guidance and direction to help members throughout the implementation of challenging new standards, including best practices, interpretations, and barriers to success.

Disclosure Effectiveness Committee

The group, initiated in 2015 by Google's SEC reporting team, meets annually at the offices of Wilson Sonsini Goodrich & Rosati hosted by sponsor, Mike Coke. Members from many Silicon Valley companies attend in person, as well as some remote participants.



Lease Committee

Led by Krista Carey, Hertz, the Lease Committee has over 50 members who meet bimonthly to review and discuss best practices and share insights around the implementation of the Lease Standard.

XBRL Quality Advisory Committee

The SEC Professionals Group XBRL Quality Advisory Committee (QAC) assists the XBRL US Data Quality Committee in their efforts to develop guidance and validation rules that can prevent or detect inconsistencies or errors in XBRL data filed with the SEC.





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