



2026 Business Officers Conference

October 5-6
Omni la Mansion del Rio, San Antonio

October 5 | 8:30 – 9:00 a.m.

San Miguel Coffee and Conference check-in

October 5 | 9:00 – 10:15 a.m.

Future-Proofing Independent Schools: Strategic Forecasting and Scenario Planning

Concepcion In an era that has escalated from the Volatile, Uncertain, Complex, and Ambiguous (VUCA) to one that is increasingly Brittle, Anxious, Non-linear, and Incomprehensible (BANI), the Business Officer's role has moved beyond traditional modeling toward profound strategic foresight. This keynote workshop explores practical strategies for financial resilience and strategic forecasting, equipping leaders to navigate systemic fragility and non-linear market shifts. Participants will gain actionable insights into strengthening fiscal adaptability and resource optimization, moving beyond simple budgeting to ensure long-term institutional sustainability in an increasingly unpredictable world.

Mike Cobb, Senior Strategist, Mission & Data

October 5 | 10:15 – 10:30 a.m.

San Miguel Break

October 5 | 10:30 – 11:45 a.m.

Translating the Numbers: Communicating Financial Information to Non-Financial Audiences

Concepcion An essential leadership responsibility of a business officer is translating complex financial information for non-financial stakeholders. Effective communication relies on clear narratives, visuals, and context that help audiences understand and appropriately interpret the numbers.

In this session, participants will explore how to determine who needs what financial and operational information, at what level of detail, and in which format. Using data storytelling techniques and a practical case study, the discussion will focus on effective approaches to sharing financial information with boards, administrators, faculty and



staff, and parent groups in ways that build understanding, trust, and informed decision-making.

Brenda Stonecipher, Principal, Stonecipher Consulting

October 5 | 11:45 – 12:45 p.m.

Concepcion Buffet Lunch

October 5 | 12:45 – 2:00 p.m.

Funding the Long View: Facilities Planning and PPRRSM Best Practices

Concepcion For most schools, the physical plant is the largest asset on the balance sheet, yet it's often the most neglected. Whether your school already has a Provision for Plant Replacement, Renewal, and Special Maintenance (PPRRSM) reserve fund, or you're in the planning stage, you'll find plenty of practical strategies in this session.

We will review the purpose of PPRRSM, common funding and spending policy approaches, and benchmarks to measure the adequacy of your fund. We'll follow a real-world case study to highlight key lessons. Participants will leave this session with a strong understanding of PPRRSM best practice approaches and how to implement them, in support of long-term facilities planning, financial sustainability, and mission alignment.

Brenda Stonecipher, Principal, Stonecipher Consulting

October 5 | 2:00 – 2:15 p.m.

San Miguel Break

October 5 | 2:15 – 3:30 p.m.

From Audit Insights to AI Governance: Understanding Financial Health in Independent Schools

Concepcion Independent schools are navigating a rapidly evolving landscape shaped by enrollment pressures, changing demographics, rising costs, cybersecurity risks, and the emergence of artificial intelligence. Drawing on insights from recent audits, industry benchmarking data, and real-world case studies, this session will explore the key indicators of financial health that school leaders should be monitoring today.

Participants will gain perspective on trends and risks being identified across independent schools, learn how peer institutions are measuring financial sustainability, and discover practical approaches for leveraging data analytics. The session will also address one of the



most pressing topics facing school business offices: developing effective AI governance policies and frameworks that support innovation while managing risk, and practical examples of prompts used by finance office professionals.

Attendees will leave with actionable insights, benchmarking considerations, and governance practices that can help strengthen their school's financial stewardship in an increasingly technology-driven environment.

Jaclyn Armanino, Managing Director – Audit, Armanino
Megan Terrell, Partner – Audit, Armanino

October 5 | 3:30 – 3:45 p.m.

San Miguel Break

October 5 | 3:45 – 4:45 p.m.

Hear from Your Peers

Concepcion Questions will be submitted by attendees in advance. [Click here to submit a question.](#)
The questions will be posed to the room, and the group will answer them together during this session.

October 5 | 5:00 – 6:00 p.m.

Four Reception sponsored by
Brothers
Courtyard



October 5 | 6:00 p.m.

Dinner and evening on your own in San Antonio

Day 2

October 6 | 8:00 – 9:00 a.m.

Concepcion Breakfast



October 6 | 9:00 – 9:50 a.m.

Unlocking the Power of Collaboration: How the Independent School Collaborative MEP is Transforming Retirement Plans

Concepcion Join industry leaders and your independent school peers for an engaging discussion on the Independent School Collaborative Multiple Employer Plan (MEP)—an innovative retirement solution designed to help schools enhance their benefits offering while reducing administrative complexity. Panelists will share real-world experiences, lessons learned, and insights into how the collaborative approach is creating meaningful value for participating schools.

Attendees will hear directly from peers and industry experts about this exciting new opportunity and discover why many plans experience lower pricing, enhanced fiduciary coverage, and stronger administrative support through participation in the MEP. Whether you are exploring retirement plan options or looking for ways to improve your current plan, this session will provide practical takeaways and valuable perspectives on the future of retirement benefits for independent schools.

Zach Evans, Director, Retirement Solutions, TIAA

Amaka Farmer, Vice President, Retirement, NFP, an Aon Company

Zach Hull, AIF, CPFA | Senior Vice President | NFP MEP Team Leader

Jesse Morrell, Dir of HR and Controller, Metairie Park Country Day

October 6 | 9:50 – 10:05 a.m.

San Miguel Break

October 6 | 10:05 – 11:20 a.m.

Legal Trends Shaping Independent Schools: What Business Officers Need to Know in 2026 and Beyond

Concepcion Artificial intelligence, federal school choice initiatives, DEI enforcement activity, and immigration policy changes are creating new opportunities and challenges for independent schools. This session will provide business officers with a practical overview of the most important legal developments affecting school operations, governance, finances, and risk management. Attendees will leave with a clearer understanding of emerging legal risks and actionable steps to support informed decision-making at their institutions.

Justin Perillo, General Counsel, NAIS

October 6 | 11:20 a.m.

Adjournment and Travel Home

2026 Business Officers Conference

Speakers

Mike Cobb



Mike Cobb serves as the Senior Innovation and Organizational Excellence Strategist at [Mission & Data](#), where he supports schools and organizations in thinking strategically about the future. He has worked as a Futurist-in-Residence at [Forsyth Country Day School](#) and now at [The Landmark School](#) in Massachusetts, helping communities explore trends, consider possible futures, and align their vision with long-term priorities. His work focuses on fostering innovation, foresight, and strategic alignment to help schools live out their mission in an ever-changing world.

Through these roles, Mike integrates research, foresight, and strategy—helping schools and organizations not only strengthen today's practices but also anticipate emerging shifts, build resilience, and design the conditions for long-term success in the future.

Mike is a visionary and results-oriented leader with a track record of successfully steering schools towards organizational excellence. With over 35 years of experience, he has served in various roles, including accomplished classroom teacher, division head, admission/enrollment leader, and Head of School. He is also an international speaker and was a key education leader in the forward-looking NEOM project in Saudi Arabia.

Previously, Mike served as the Head of School at [All Saints Episcopal School](#) in Tyler, Texas. Under his leadership, the school underwent strategic vision work resulting in new North Star documents: Mission and Core Values. He led a successful Enrollment Management program, achieving unprecedented growth and sustainability. Mike also successfully spearheaded a capital campaign and led over 30 construction projects, including [nationally recognized learning spaces](#) such as the Center For Innovation, The Collaboratory, Outdoor Learning Center, Lower School Learning Villages, Learning Farm and more.

As the Head of [NEOM Community Schools and Senior Manager of NEOM Baccalaureate in Saudi Arabia](#), Mike led the NEOM Education, Research, and Innovation sector through strategic vision work, resulting in plans for the NEOM Baccalaureate program, Centers for Excellence, and future campuses. He created and implemented a professional development program for leadership, faculty, and

staff, successfully launching programs including AI & Robotics, Sustainability, NEOM X, Entrepreneurship & Leadership, Oceanographic Studies, and Teaching & Learning.

Mike is also a co-founder of the [Sandbox](#), an Innovative Think Tank where thought leaders share visions in a grown-up sandbox setting. Inspired by the unstructured nature of playground sandboxes, the Sandbox provides a space for leaders nationwide to engage in spontaneous, fruitful conversations about their passions. This network emphasizes the value of unscripted dialogue between thought leaders fostering authentic exchanges and innovative ideas in the realms of education and leadership.

During his 20-year tenure at [The Oakridge School](#) in Arlington, Texas, Mike held various roles during his educational leadership journey, including Director of Admissions and Enrollment, Head of Middle School, and Director of Summer Programs. He led strategic initiatives in admissions, developed innovative admission assessments, and restructured admissions programs and the Oakridge Ambassador program. As Head of Middle School, he successfully launched a 1:1 laptop initiative (Learn 21), emphasized character education and wellness, and organized comprehensive programs for authentic learning and student agency.

Mike's career reflects a dedication to transformative education, organizational excellence, innovative leadership, and continuous learning with participation in programs such as Dare to Lead Trainer Certification, SAP Certified Associate in Design Thinking, the NAIS Aspiring Heads Fellowship, NAIS New Heads Institute, Vanderbilt University's Peabody Fellow in the Institute for Independent School Leadership, and more. Mike has been active in the greater independent school world throughout his career. He has served on several boards, including the Independent Schools Association of the Southwest (ISAS) and Texas Private Schools Association (TPSA), as well as serving on task forces with National Association of Independent Schools (NAIS), International Pathways (IP) and others. He has extensive accreditation experience, having led many visiting teams at schools across the world. He has written and presented prolifically, and has advised boards and heads on topics ranging from trendspotting to best practices in governance and leadership. He is also a [Fulbright Specialist](#), part of a prestigious U.S. Department of State program that connects leading experts with institutions around the world to foster international collaboration and advance global knowledge exchange.

Brenda Stonecipher



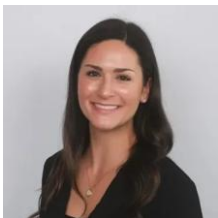
A native of the Pacific Northwest, Brenda Stonecipher holds a BA in English Literature from the University of Washington and an MBA from the UW Foster School of Business. She is also a Certified Public Accountant. Though her career gravitated toward finance and accounting, it's not just the numbers that inspire her, it's the stories they tell. Brenda believes that, when skillfully interpreted, a business's operational and financial data can narrate the full arc of its journey, its past, present, and future.

Brenda has more than three decades of financial and executive leadership across education, healthcare, arts administration, and government. Having held key roles as CFO, Executive Director, and Interim Head of School for several organizations, she has a proven track record in nonprofit management. Additionally, she served 20 years as a City Councilmember in Everett, WA, being elected five times before retiring from public service in December 2023.

Brenda now leads Stonecipher Consulting Group, a firm she founded to provide strategic, financial, and operational management services to independent schools and nonprofit organizations. Along with her team of five professionals, Brenda is passionate about educating nonprofit leaders, helping them deepen their understanding of financial management, and building organizational capacity and confidence at all levels.

Outside of her professional work, Brenda is a multifaceted enthusiast. She is known for hosting memorable dinner parties, trekking with her beloved golden retriever, and cheering on college hockey teams. A political junkie, she starts her day by devouring five news sites before breakfast. She's also an avid traveler, finding as much joy in planning a trip as she does in the journey itself.

Jaclyn Armanino



Jaclyn Armanino joined Armanino in 2017 and has experience providing audit and accounting services to companies and organizations in a broad range of industries. She specialized in the financial statement audits of not for profits, private schools and insurance. She is a Certified Public Accountant (CPA) and a member of both the American Institute of Certified Public Accountants and the California Society of CPAs. Jaclyn graduated from Santa Clara University with a bachelor's degree in accounting.

Megan Terrell



Over her 21-year career in public accounting, Megan Terrell has built strong working relationships with her clients by maintaining direct involvement with client engagements and working with them year-round to provide additional value. She is a licensed CPA who has focused primarily on nonprofit organizations for over a decade. She regularly interacts with the community through speaking engagements that provide guidance on financial and governance topics for organizations and their benefit plans. She has developed an extensive knowledge base that includes private schools, arts, cultural, social service, healthcare, and membership organizations. She is involved in her local community through her service in leadership and governance positions with The Center for Transforming Lives and The Texas Society of CPAs.

Amaka Farmer



Amaka is a Vice President of Retirement at NFP, an Aon company, based in Charlotte, North Carolina, where she has been in her current role since May 2025. She specializes in retirement solutions with a strong focus on Multiple Employer Plans (MEPs) and Pooled Employer Plans (PEPs). Her expertise includes collaborating with external prospects and partners, onboarding plan sponsors, and working closely with third-party administrators, plan advisors, and RIAs to design and implement retirement plans nationwide. Amaka brings deep relationship management, cross-functional collaboration, and client advisory skills to her role.

Prior to joining NFP, Amaka spent over eight years at TIAA in progressively senior roles. She served as Director of Multiple Employer Plans, working with state executives, associations, and school districts to develop and launch new MEPs across the country. Before that, she was a Relationship Manager, managing institutional relationships and supporting retirement plan design and implementations. Earlier in her career at TIAA, Amaka worked as a Financial Planning Consultant and Financial Services Consultant, providing in-person financial advice to universities and nonprofit institutions and supporting RFPs, audits, and special projects. She began her career at Vanguard, where she held roles as a Select Services Consultant and Investment Broker.

Amaka earned a Bachelor of Science degree in Accounting and Finance from the University of North Carolina at Greensboro.

Zach Evans



Zach Evans brings twenty years of financial services expertise to his role as Retirement Solutions Director at TIAA, where he oversees comprehensive retirement planning strategies for institutional clients nationwide. A graduate of Wingate University and holding an MBA from Wake Forest University, Zach combines a strong academic foundation with fourteen years of deep institutional knowledge at TIAA. His expertise in retirement plan design, regulatory compliance, and investment strategy has earned him a reputation as a trusted advisor who helps organizations navigate a complex and ever-evolving landscape. Known for his collaborative approach and genuine dedication to client success, Zach remains singularly focused on building retirement programs that deliver meaningful outcomes for the people they serve.

Zach Hull



Zach Hull is a Senior Vice President with NFP Retirement in Charlotte, NC. Zach is a 20-year veteran of the institutional retirement plan consulting industry and leads NFP's MEP Team. Zach is a specialist in the Independent K12 and higher education space and devotes much of his professional time working with schools in managing their employer-sponsored retirement plans. Zach will hold the primary responsibility for the ISC MEP's relationship with NFP and will be responsible for the coordination and deployment of NFP's suite of services.

Prior to joining NFP in 2023, Zach was a Senior Director of Institutional Retirement Plan Consulting at Compass Financial Partners, Marsh McLennan Agency Company. While at Compass, Zach was the founding advisor of the original NCAIS MEP and then served as the founding advisor for the ISC MEP for the state/regional associations of NC, SC, GA, AL, MS, ISAS, FL, and SAES. Zach was intimately involved in the creation, design, economic model, and marketing of the ISC MEP. This was an intricate process that required attention to detail, marketing and sales creativity, as well as expertise in ERISA compliance and plan design. Zach, along with vendor partners Amaka Farmer at TIAA and Wade Connor at Pentegra, worked to recruit and onboard over 80% of the existing participating schools into the ISC MEP.

A leader at Compass Financial Partners for roughly ten years, Zach supported the firm's institutional consulting efforts while providing fiduciary advice to Plan Sponsors across the US. Prior to joining Compass Financial Partners, Zach was a Financial Advisor and Retirement Plan Specialist at UBS Financial Services.

Zach is a Certified Plan Fiduciary Advisor (CPFA®) through the National

Association of Plan Advisors and has received the Accredited Investment Fiduciary (AIF®) designation through the Center for Fiduciary Studies. Zach holds a FINRA Series 7 and 66 and is a Plan Sponsor Retirement Professional. In addition, he was recognized by the National Association of Plan Advisors as one of the Top Advisors Under 40 in 2017, 2018, 2019, 2020 and 2021.

A big believer in and supporter of Independent Schools, Zach has three children enrolled at Charlotte Latin School where he and his wife, Emily, devote much of their time volunteering.

Finally, Zach is also very active in his community and has a passion for helping young children. Zach gives his time to HEART Math Tutoring where he provides math tutoring to Title 1 Elementary School children. Zach is also an elementary school basketball coach and volunteer with the First Tee of the Carolinas. Zach graduated from Elon University with a degree in finance.

Jesse Morrell



Jesse Morrell is the Director of Human Resources and Auxiliary Services at Metairie Park Country Day School in Metairie, Louisiana. He provides strategic HR leadership to more than 200 employees and oversees all business and accounting for the school's auxiliary services. With more than 20 years of experience in benefits administration, payroll, and compliance, Jesse has led major organizational initiatives- including transitioning the school to a Multi-Employer Retirement plan.

Jesse is actively involved in leadership and governance, serving on several boards, including the Independent School Collaborative Board of Directors, the Mutual of Omaha Employer Advisory Board, and previously as Chair and Treasurer of the Common Ground Health Clinic Board of Directors. Jesse has been invited to join the TIAA Advisory Council, and his first term will begin in January 2027.

He earned his Bachelor of Arts in Anthropology from Dickinson College and his Master of Business Administration from the University of New Orleans. A graduate of the National Business Officers Association Leadership Academy, Jesse brings a blend of strategic, financial, and human-centered expertise to his work in independent schools.

Justin Perillo

Justin Perillo has been the General Counsel at the National Association of Independent Schools since February 2025. Prior to NAIS, Justin was the Vice President, General Counsel & Secretary at Marymount University since October 2022. With more than 20 years of experience in education law, he served as a key advisor on policies and strategies that guide the University in achieving its mission. In this role Justin provided legal counsel and advice to the President, the Board of Trustees, and the University administration, ensuring that Marymount University navigated legal challenges with a strategic and collaborative approach. Before joining Marymount, Justin spent 19 years at American University where he served in various capacities, including Associate General Counsel. His expertise spans a broad range of legal issues in education, including intellectual property, commercial and transactional law, athletics, information systems, student affairs, and scientific research. He has played a critical role in developing key strategic initiatives such as transforming Title IX and Freedom of Expression policies and expanding American University's trademark portfolio. He earned both his J.D. and bachelor's degrees from American University.