



AMERICAN COUNCIL OF ENGINEERING COMPANIES

Finance Forum

The Renaissance Nashville – Nashville, Tennessee

September 20 & 21, 2021

Monday, September 20

7:30 am – 8:30 am

Continental Breakfast

8:30 am – 10:00 am

Introductions and Discussion of Pre-Event Survey
Laura Rosenbaum, Taylor Engineering
Albert Cuisinot, Environmental Science Associates

10:00 am – 10:15 am

Break

Networking breaks sponsored by ACEC Retirement Trust



10:15 am – 11:30 am

AASHTO & FAR Update

Dan Purvine, Clarity A/E Clarity Consulting and Training
Wayne Owens, Stambaugh Ness

11:30 am – 12:00 Noon

Open Discussions – Q&A from Forum Participants
David Kent, WGI

12 Noon – 12:45 pm

Lunch

12:45 pm – 1:30 pm

Legislative and Regulatory Update
Katharine Mottley, ACEC

1:30 pm - 2:30 pm

Mergers & Acquisitions Update
Nick Belitz, Morrissey Goodale LLC

2:45 pm – 3:00 pm

Break

3:00 pm – 4:00 pm

Breakout sessions

1) *ESOP Issues Roundtable*

Peter Ney, EA Engineering Science & Technology
Tim Priddy, SSR
Albert Cuisinot, Environmental Science Associates
Chris Stalloch, Chartwell Financial Advisors

2) *Ownership Transition*
Ralph Picano, Wade Trim
Nick Belitz, Morrissey Goodale

4:00 pm – 4:30 pm

Open Discussions
John Penewitt, LJA Engineering

5:00 pm

Forum Reception
Sponsored by Chartwell Financial Advisory & First American
Equipment Finance



Tuesday, September 21

7:30 am – 8:30 am

Continental Breakfast

8:00 am – 8:30 am

**Why You Should Manage Your Firm Like a Private Equity Owner:
Perspective on M&A Risks**
Mark Baum and Matias Ormaza, ACEC BIT



8:30 am – 9:45 am

The Future-Ready Finance Leader - What Got You Here Won't Get You There
Tom Hood, Association of International Certified Professional
Accounts

9:45 am – 10:45 am

Accounting & Tax Update
Kevin Flattery, Plante Moran

10:30 am – 10:45 am

Break

10:45 am – 12:00 noon

Budget & Planning Tools – Excel Usage and Adaptive Insight
Tim Priddy, SSR
Dave Johnson, Otak
Kyn Child, Otak
Albert Cuisinot, Environmental Science Associates

12 Noon – 12:45 pm

Networking Lunch & Discussion about next year's forum
David Kent, WGi

12:45 pm – 1:45 pm

Key Performance Indicators

Dave Johnson, Otak

Kym Child, Otak

1:45 pm – 3:00 pm

New Normal After Covid

David Chambers, Delta Engineers, Architects & Land Surveyors,

Laura Rosenbaum, Taylor Engineering

3:00 pm

Forum Adjourns

We would like to recognize and thank our forum sponsor

