Finance Forum
The Westin Riverwalk – San Antonio, Texas
September 11-13, 2022

Sunday, September 11
5:30pm - 6:30pm Opening Reception
sponsored by Chartwell and First American Finance

Monday, September 12
7:30 am Registration opens sponsored by BST Global?
7:30 am – 8:30 am Continental Breakfast
8:30 am – 9:25 am Introductions and Discussion of Pre-Event Survey (last year)
Laura Rosenbaum, Taylor Engineering
Albert Cuisinot, Environmental Science Associates
9:30 am – 10:30 am Risk Management & Insurance Update
Dale Crow, Risk Strategies
10:30 am – 10:45 am Break
Networking Break Sponsored by ACEC Retirement Trust
10:45 am – 12:00 Noon AASHTO & FAR Update
Dan Purvine, Clarity A/E Clarity Consulting and Training
Wayne Owens, Stambaugh Ness
12:00 Noon – 1:00 pm Lunch
1:00 pm – 1:55 pm Mergers & Acquisitions Update
Josh Lahre, AEC Advisors LLC
2:00 pm – 2:55 pm Dynamics of Transactions
Albert Cuisinot, Environmental Science Associates
Dave Johnson, Otak
John Penewitt, LJA Engineering
Josh Lahre, AEC Advisors LLC
2:55 pm – 3:10 pm Break
Networking Break Sponsored by ACEC Retirement Trust
3:10 pm – 4:10 pm Real Estate – Reconfiguring of Space
Jonathan Allen, JLL
4:15 pm – 4:45 pm  Open Discussions  
John Penewitt, LJA Engineering

Tuesday, September 13

7:30 am – 8:30 am  Continental Breakfast  
Sponsored by ACEC Business Insurance Trust

8:30 am – 9:30 am  Analytics of ACEC EFCG Survey  
Rebecca Zofnass, EFCG

9:30 am – 10:00 am  Moderated discussion on ACEC EFCG Survey  
Ralph Picano, WadeTrim  
Tim Priddy, Smith Seckman Reid, Inc.

10:00 am – 10:15 am  Break  
Networking Break Sponsored by ACEC Retirement Trust

10:15 am – 11:15 am  Accounting & Tax Update  
Adam Dimmick, Briggs & Veselka Co.

11:15 am – 12:00 noon  Legislative and Regulatory Update  
Katharine Mottley, ACEC

12:00 Noon – 12:45 pm  Networking Lunch & Discussion about next year’s forum  
David Kent, WGI

12:45 pm – 2:15 pm  Strategic Planning & Board Engagement: What Is Needed from the CFO for the Board  
Loren Sokolow, Isaak Advisory Group  
Mark Isaak, Isaak Advisory Group

2:15 pm – 2:45 pm  Open Discussion

3:00 pm  Forum Adjourns

We would like to recognize and thank our Forum sponsors

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