



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
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

Presentation by ACEC Business Insurance Trust

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**
Presentation by ACEC Retirement Trust

8:30 am – 9:30 am *Key Trends Impacting CFOs and Finance Teams of Engineering Firms*
Vishal Menon, EFCG

9:30 am – 10:00 am Open Discussion
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 & Mike Giles, Crowe LLP

11:15 am – 12:15 pm *Legislative and Regulatory Update*
Katharine Mottley, ACEC
Diana Strassmaier, CPA, CCIFP, Aldrich CPAs Advisors LLP

12:15 Noon – 1:00 pm **Networking Lunch & Discussion about Next Year's Forum**
David Kent, WGI

1:00 pm – 2:30 pm *Strategic Planning & Board Engagement: What Is Needed from the CFO for the Board*
Mark Isaak, Isaak Advisory Group
Loren Sokolow, Isaak Advisory Group

2:30 pm – 3:00 pm Open Discussion

3:00 pm **Forum Adjourns**

Code of Conduct

Conversations should not be had if they encourage or facilitate members to arrive at any agreement that either expressly or impliedly leads to price fixing, a boycott of another's business, or other conduct intended to illegally restrict free trade.

Conversations that encourage or facilitate an agreement about the following subjects are inappropriate: prices, discounts, or terms or conditions of sale; salaries; profits, profit margins, or cost data; market shares, sales territories, or markets; allocation of customers or territories; or selection, rejection, or termination of customers or suppliers.

Review the full guidelines at community.acec.org/codeofconduct