



Finance Forum

Hyatt Regency Grand Cypress Resort – Orlando, Florida

September 10-12, 2023

Sunday, September 10

5:30 pm – 6:30 pm

Opening Reception

Monday, September 11

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 – 10:30am

Getting Our Mise En Place – Setting Our Table for the Future and Developing the Right Talent

Tom Hood, EVP, Business Engagement & Growth,

Association of International Certified Professional Accountants

10:30 am – 10:45 am

Break

10:45 am – 12:00 Noon

FAR Update

Dan Purvine, A/E Clarity Consulting and Training LLC

Wayne Owens, Stambaugh Ness

Diana Strassmaier, Aldrich CPAs + Advisors LLP

12:00 Noon – 1:00 pm

Luncheon and Table Discussions

1:00 pm – 1:55 pm

Mergers & Acquisitions Update

Jessica Barclay, Managing Partner M&A, EFCG

2:00 pm – 2:55 pm

Cyber Fraud/Update

Speaker TBA

2:55 pm – 3:10 pm

Break

Networking Break Sponsored by ACEC Retirement Trust

3:10 pm – 4:10 pm

Key Performance Indicators

Dave Johnson, Otak

4:15 pm – 4:45 pm

Open Discussions

Tuesday, September 13

7:30 am – 8:30 am

Continental Breakfast

Presentation by the ACEC Business Insurance Trust

8:30 am – 9:30 am

Generative AI in AEC: Golden Age or Brave New World?

Marcus Quigley, EFCG

9:30 am – 10:30 am

Internal Controls/Fraud

Sean Daughton, Dannible & McKee

10:30 am – 10:15 am

Break

10:15 am – 11:15 am

Accounting Update

Erin Roberts, Ernst & Young LLP

11:15 am – 12:00 pm

Legislative Update

Katharine Mottley, ACEC

12:00 Noon – 1:00 pm

Networking Lunch

1:00 pm – 2:30 pm

Breakout sessions – CFO Best Practices, divided by firm size.

2:30 pm – 3:00 pm

Open Discussion & Discussion about next year's forum

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

We would like to recognize and thank our forum sponsors:

