



## Finance Forum

Hyatt Regency Grand Cypress Resort – Orlando, Florida

September 10-12, 2023

### Sunday, September 10

5:30 pm – 6:30 pm

#### Opening Reception

Sponsored by First American Finance and Chartwell

### Monday, September 11

7:30 am – 8:30 am

#### Continental Breakfast

8:30 am – 9:30 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*

Barry Payne, Director of External Relations, 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

#### Networking Lunch

1:00 pm – 1:55 pm

#### *Mergers & Acquisitions Update*

Jessica Zofnass Barclay, Managing Partner M&A, EFCG

2:00 pm – 2:55 pm

#### *Business Continuity Planning, Cyber and More*

Mary Erchul, ACEC Business Insurance Trust

2:55 pm – 3:10 pm

#### Break

3:10 pm – 4:10 pm      *Advocacy Update*  
Katharine Mottley, ACEC  
Diana Strassmaier, Aldrich CPAs + Advisors LLP

4:15 pm – 4:45 pm      *Open Discussions*

## **Tuesday, September 12**

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      *Key Performance Indicators*  
Dave Johnson, Otak  
Kym Child, Otak

10:30 am – 10:45 am      **Break**

10:45 am – 11:45 am      *Accounting Update*  
Erin Roberts, Ernst & Young LLP

12:00 Noon – 1:00 pm      **Networking Lunch**

1:00 pm – 1:45 pm      *Internal Controls/Fraud*  
Sean Daughton, Dannible & McKee

1:45 pm – 2:00 pm      **Break**

2:00 pm – 3:00 pm      Breakout sessions – CFO Best Practices (divided by firm size)

3:00 pm – 3:30 pm      *Open Discussion & Discussion about next year's forum*

3:30 pm      **Forum Adjourns**

## **Forums 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.

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