



AMERICAN COUNCIL OF ENGINEERING COMPANIES

## Finance Forum

Hilton Cleveland Downtown – Cleveland, OH

September 27-29, 2026

### - Daily Schedule of Events -

Sunday, September 27, 2026

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**5:30 pm - 6:30 pm**      **Opening Reception**  
*Cocktails & hors d'oeuvres*

Monday, September 28, 2026

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**7:30 am - 8:30 am**      **Continental Breakfast & Networking**

**8:30 am - 9:30 am**      **Introductions and Live Attendee Polling**  
*Laura Rosenbaum, Taylor Engineering*  
*Gwen Perez, Freese and Nichols*

**9:30 am - 10:30 am**      **AI in Finance: Practical Use Cases and Strategies for Engineering Firms**  
*Marcus Quigley, EFCG*  
*David Johson, PRIME AE*  
*Alex McPherson, RK&K*  
*Chris Moss, Taylor Engineering*

**10:30 am - 10:45 am**      **Coffee Break & Networking**

**10:45 am - 11:45 am**      **PAC 101 for Engineering Firms: Purpose, Structure, and Smart Management**  
*Tricia Roederer, McTigue & Colombo LLC*

**11:45 am - 12:45 pm**      **Networking Lunch**

**12:45 pm - 1:45 pm**      **Firm of the Future**  
*Joe Bates, ACEC Research Institute*

**1:45 pm - 2:45 pm**      **Large and Small Firm Breakout Discussions**

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|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2:45 pm - 3:00 pm</b> | <b>Coffee Break &amp; Networking</b>                                                                                                                                                                              |
| <b>3:00 - 4:00 pm</b>    | <b>Project Metrics and FP&amp;A: Turning Data into Insight for Firm Leaders</b><br><i>Kym Child, PRIME AE</i><br><i>Christiana Henning, PRIME AE</i><br><i>Dave Johnson, PRIME AE</i><br><i>Alec Pfeffer, ISG</i> |
| <b>4:00 - 5:00 pm</b>    | <b>Open Discussion</b>                                                                                                                                                                                            |
| <b>5:30 pm - 7:00 pm</b> | <b>Reception at The Great Lakes Science Center</b><br><i>Join us for an evening of networking, drinks, hors d'oeuvres, and interactive exhibits at Cleveland's Great Lakes Science Center.</i>                    |

Tuesday, September 29, 2026

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| <b>7:30 am - 8:30 am</b>   | <b>Continental Breakfast &amp; Networking</b>                                                                              |
| <b>8:10 am - 8:30 am</b>   | <b>Sponsor Presentation</b><br><i>ACEC Business Insurance Trust</i>                                                        |
| <b>8:30 am - 9:30 am</b>   | <b>AEC Financial Market Update</b><br><i>Steve Gido, ROG Partners</i>                                                      |
| <b>9:30 am - 10:30 am</b>  | <b>Breakout Discussions by Firm Size and Business Structure</b>                                                            |
| <b>10:30 am - 10:45 am</b> | <b>Coffee Break &amp; Networking</b>                                                                                       |
| <b>10:45 am - 11:15 am</b> | <b>FAR Update</b><br><i>Tony Machi, Stambaugh Ness</i><br><i>Dan Purvine, AE Clarity Consulting and Training</i>           |
| <b>11:15 am - 12:00 pm</b> | <b>Open Discussion on FAR Update</b>                                                                                       |
| <b>12:00 pm - 1:00 pm</b>  | <b>Networking Lunch</b>                                                                                                    |
| <b>1:00 pm - 2:00 pm</b>   | <b>Legislative &amp; Tax Update</b><br><i>Katharine Mottley, ACEC</i><br><i>Diana Strassmaier, Aldrich CPAs + Advisors</i> |
| <b>2:00 pm - 3:00 pm</b>   | <b>Open Discussion</b>                                                                                                     |
| <b>3:00 pm - 4:00 pm</b>   | <b>Driving Better Decisions Through HR-Finance Collaboration</b>                                                           |

*Joint panel and open discussion with the ACEC Finance Forum on how collaboration, data, and shared insight drive smarter business and workforce decisions.*

**4:00 pm**

**Forum Adjourns**