

2027 COALITIONS WINTER CONFERENCE

FEBRUARY 9–10, 2027 | CHARLOTTE, NC

FIRM FORWARD

SMALL FIRM WORKSHOP

TUESDAY, FEBRUARY 9, 2027
Le Méridien Charlotte | Charlotte, NC

7:30 – 8:00 AM

Registration & Breakfast

8:00 – 8:15 AM

Welcome & Opening Remarks

8:15 – 9:45 AM

SESSION 1

Buy-Sell & Shareholder Agreements

Spot the provisions that protect your firm through ownership changes and keep valuations fair.

Jeff Hancock, SMH Consultants (Moderator)
Nute Thompson, JD, VP, General Counsel & Secretary, Summit Design and Engineering Services

Joined by, fellow legal counsel advisors and firm owners

9:45 – 10:00 AM

Break

10:00 – 11:30 AM

SESSION 2

Boards of Directors: Structure & Legal Requirements

Decide when a board makes sense, who belongs on it, and what responsibilities come with it.

Jeff Hancock, SMH Consultants (Moderator)
Nute Thompson, JD, VP, General Counsel & Secretary, Summit Design and Engineering Services

Joined by, outside legal counsel and governance advisors to privately held A/E firms

11:30 AM – 12:30 PM

Networking Lunch

12:30 – 2:00 PM

SESSION 3

Succession Planning

Build a leadership pipeline and align ownership and management transitions with your firm's goals.

Galit Ryan, Small Firm Coalition Chair (Moderator)

Justin Naser, ARW Engineering
Tina Wyffels, BKBM
John Burns, Burns Engineering

2:00 – 2:15 PM

Break

2:15 – 3:45 PM

CAPSTONE

Session 4: Scaling the Firm

See how three growing firms brought ownership, governance, and succession together, and what they'd do differently.

Doc Moyle, ARW Engineering (Moderator)

Bill Lloyd, Great West Engineering
Harvind Singh, Singh + Associates, Inc.
Kevin Chamberlain, DeStefano & Chamberlain, Inc.

3:45 – 4:00 PM

Break

4:00 – 5:00 PM

Peer Roundtable Discussion *Swap ideas with fellow firm leaders.*

5:30 PM

Networking Reception *All workshop attendees are invited!*

HOTEL Le Méridien Charlotte | ACEC rate \$229/night, standard room, tax included | Book by January 8, 2027 for this rate

Agenda subject to change.