

Exclusively  
for AEC  
Industry CFOs



**EFCG**  
Environmental Financial  
Consulting Group

# CFO Conference Agenda

The Four Seasons

Denver, CO | March 4-6, 2026



## Sponsorship Partners



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# WELCOME



**EFCG**  
Environmental Financial  
Consulting Group



FOUR SEASONS  
HOTEL  
DENVER

**CFO  
CONFERENCE**  
March 4-6, 2026

## ABOUT EFCG

EFCG is a global specialized M&A advisor and management consultant to architecture, engineering, and consulting (AEC) firms. Our mission is to provide a strategic edge to AEC firms to advance the industry through our end-to-end, integrated solutions that support executive leaders with their most critical strategic and financial decisions.

For 35+ years and counting, we have served as a retained advisor to 550+ firms, developed an extensive proprietary database of financial and business metrics from our clients, held more than 100 executive conferences, and advised on 240+ M&A transactions. The relationships we have formed with the executive teams at every major AEC firm make us a valued and trusted advisor.

### Management Consulting

**550+**  
AEC Firms Advised

- Strategic Planning
- Corporate Financial Benchmarking
- Valuations
- Talent & Compensation
- Technology & Innovation
- Sustainability & ESG

### Mergers & Acquisitions

**240+**  
M&A Transactions Advised On

- Sell- & Buy-Side Assignments
- Capital Structure Analysis
- Corporate Divestitures & Tech Spinouts
- Strategic & Private Equity Partner Engagement
- Integration Planning
- Due Diligence & Market Studies

### Leadership Conferences

**100+**  
Conferences Hosted

- Analysis on AEC Trends from EFCG's Proprietary Industry Database
- Perspectives from Subject Matter Experts and Industry Executives
- Invaluable Peer-Networking Opportunities

### Advanced Data Analytics & Insights

EFCG has developed a comprehensive proprietary database exclusively for the industry

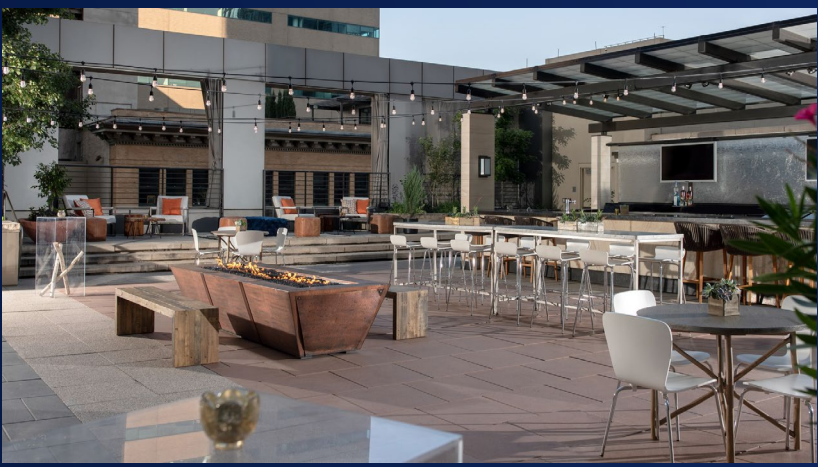
**6**  
Annual  
Surveys

**8M+**  
Data Points  
Every Year

**500+**  
Database  
Contributing Firms

## ABOUT EFCG'S CFO CONFERENCE

Recognized as a premier conference for financial executives in the AEC industry, this event will invite 150 CFOs and delve into the major strategic and financial decisions CFOs are focused on today. Using EFCG's exclusive 2026 CFO Survey, this conference will provide the first look at the AEC Industry's reported 2025 performance and projections for 2026 and 2027.



### Dates & Times

Wednesday, March 4<sup>th</sup> 3:00 pm – 8:00 pm MT  
Thursday, March 5<sup>th</sup> 8:30 am – 8:00 pm MT  
Friday, March 6<sup>th</sup> 8:15 am – 1:00 pm MT

### Dress Code

Business casual

### Hotel & Conference Venue Information

[The Four Seasons Denver](#)

1111 14th St, Denver, CO 80202  
+1 (303) 389-3000

EFCG's 2026 CFO Conference will be held at The Four Seasons Denver, a AAA Five Diamond hotel with award-winning service. This urban retreat is in the heart of the Mile High City.

### Drive to Airport

Denver International Airport:

Car: 40 minutes

Train (Denver Airport Station A to Union Station): 60 minutes

### Thursday Evening Networking Reception & Dinner

[Tamayo](#)

1400 Larimer St, Denver, CO 8202

The Evening Networking Reception & Dinner on Thursday night will be held at the acclaimed Richard Sandoval restaurant Tamayo. With sweeping views of the Rocky Mountains and downtown Denver, Tamayo offers the perfect setting to unwind and connect with fellow conference attendees.

### Photography & Press

Recordings and images from the event may be used for live or on-demand sessions, EFCG materials, or by other participating firms in their own promotions. If you prefer not to be recorded or photographed, please let EFCG know in writing at [efcg@efcg.com](mailto:efcg@efcg.com). Press will be invited to the event and may publish articles on the event and its sessions.

## SPONSORSHIP PARTNERS

We are especially thankful for the collaboration we have with our partners.

### Brownstein

At **Brownstein**, clients get access to the top legal minds in the industry, powerful policy knowledge and best-in-class business acumen to solve their toughest challenges. Brownstein is a law and lobbying firm that has been making moves for more than 55 years to stay at the vanguard of its industry. You'll find us at the heart of many of the most important cases, the most significant deals, and the country's most pivotal legislation. Visit [www.bhfs.com](http://www.bhfs.com).

### Deltek

**Deltek** is the intelligent platform that powers the project lifecycle- from ERP and accounting to project bidding, planning, delivery and analysis. Trusted by 30,000 organizations across government contracting, aerospace and defense, architecture and engineering, construction, and consulting, Deltek delivers the speed, clarity and control needed when the stakes are high. Visit [www.deltek.com](http://www.deltek.com).



### Gallagher

Insurance | Risk Management | Consulting

**Gallagher Private Client** designs personalized insurance solutions for high-net-worth individuals and families. Everyone on our team has an in-depth understanding of elevated lifestyles and their inherent risks, enabling us to build generation-spanning relationships with our clients. Unique exposures - combined with a challenging insurance market - require an agent with keen insight, innovative strategies, and an unrelenting pursuit of the right risk management solution. Gallagher Private Client is backed by the global strength of a Fortune 500 firm and dedicated to delivering the personalized service of a boutique firm. We're proud of our long history of not resting on our laurels, because you don't buy insurance to take a risk. Visit [privateclient.ajg.com](http://privateclient.ajg.com).



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(All Times in Mountain Time)

### Wednesday, March 4, 2026

3:00 pm – 4:00 pm

**First-time Attendee Welcome Coffee**

4:00 pm – 5:00 pm

**Workshop: A Data Deep-Dive: Getting to Know the Data Behind EFCG's AEC Industry Overview (Great for First-Time Attendees)**

5:30 pm – 6:30 pm

**Women in Leadership Event**

6:30 pm – 8:00 pm

**Conference Welcome Reception**

### Thursday, March 5, 2026

8:30 am – 9:00 am

**Breakfast Meet-and-Greet**

9:00 am – 10:30 am

**Session 1: EFCG AEC Industry Overview**

10:30 am – 11:00 am

**Morning Coffee Social**

11:00 am – 11:45 am

**Session 2: State of the Industry Through the Lens of Influential CFOs**

11:45 am – 12:00 pm

**CFO of the Year Announcement**

12:00 pm – 1:00 pm

**Lunch**

1:15 pm – 2:00 pm

**Session 3: Breakout Sessions**

3A: M&A in AEC: High Impact Advisors & Partners Across the Deal Cycle

3B: Defining Your Safety Quotient: Maximizing Profitability by Protecting Employees

2:15 pm – 2:45 pm

**Session 4: Today's Tech Trends & AI Workforce Resilience**

2:45 pm – 3:25 pm

**Session 5: Tech & AI: Effective Financial Team Technologies**

3:40 pm – 4:25 pm

**Session 6: Breakout Sessions**

6A: Tech & AI: Operationalizing AI Across the Business: Practical Steps A&E CFOs Are Taking Now

6B: Preserving Wealth, Protecting Legacy: Personal Insurance for Financial Stewards

4:45 pm – 5:35 pm

**Session 7: Turning Pricing Pressures Into Pricing Strategy: Who Pays for Progress?**

6:00 pm – 8:00 pm

**Evening Networking Reception & Dinner**

### Friday, March 6, 2026

8:15 am – 9:00 am

**Roundtables with Breakfast: Small-Firm Roundtable & PE-Backed Roundtable**

8:30 am – 9:00 am

**General Breakfast Reconnect for All Attendees**

9:00 am – 10:00 am

**Session 8 Keynote: Phillip A. Washington, Denver International Airport CEO**

10:15 am – 10:45 am

**Session 9: M&A Trends & the 2026 Outlook**

10:45 am – 11:30 am

**Session 10: Winning M&A Strategies and What's Next for the Year Ahead**

11:50 am – 12:35 pm

**Lunch & Session 11: Succession by Design: CFO Transition Strategies**

12:35 pm – 1:00 pm

**Closing Coffee & Conversation**

(All Times in Mountain Time)

**Wednesday, March 4, 2026**

**3:00 pm – 4:00 pm**  
**Grand Ballroom Foyer**

### First-time Attendee Welcome Coffee

It is our pleasure to welcome new attendees to our event each year. Join us for the official opening of the 2026 CFO Conference, a warm and engaging welcome event created for first-time attendees. This casual gathering sets the tone for the days ahead, offering a chance to meet fellow attendees and connect with the EFCG Team. Enjoy light refreshments and get oriented with the conference layout and schedule as we begin your memorable and enriching experience ahead.

**4:00 pm – 5:00 pm**  
**Grand Ballroom**

### Workshop: A Data Deep-Dive: Getting to Know the Data Behind EFCG's AEC Industry Overview (Great for First-Time Attendees)

Curious about the data that powers EFCG's insights into the AEC industry? This interactive workshop is designed especially for first-time attendees and anyone looking to better understand the foundation of EFCG's industry analysis. We'll explore how EFCG leverages over 8 million proprietary data points annually—from financial benchmarks to talent trends—to deliver strategic guidance to AEC firms and construct the annual AEC Industry Overview. Join us for a deep dive on the underlying data that shapes the EFCG Industry Overview and leave with a clearer understanding of how to interpret and apply this data to your firm's advantage.

**Presenter:** Vishal Menon, EFCG Vice President, Strategy & Corporate Finance

**5:30 pm – 6:30 pm**  
**Aspen Room**

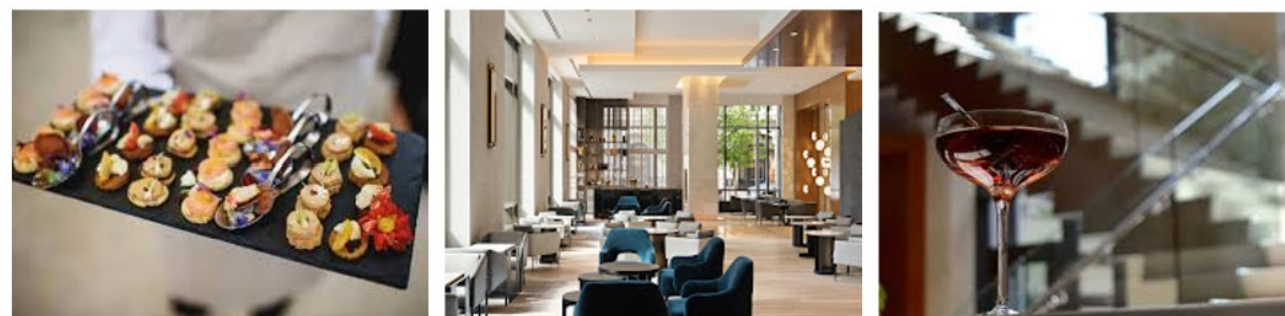
### Women in Leadership Event

This event offers a unique networking opportunity for women attending the conference, with the chance to connect over drinks and hors d'oeuvres before heading into the Conference Welcome Reception.

**6:30 pm – 8:00 pm**  
**Grand Ballroom & Foyer**

### Conference Welcome Reception

Join us for a casual and engaging welcome reception, offering a chance to network, catch up with peers, and settle in before sessions begin.



### Visit the Conference Portal

- ✓ Learn More About EFCG
- ✓ View Searchable Attendee List
- ✓ Access the Schedule
- ✓ Download Presentations
- ✓ View the Speakers
- ✓ Vote in Live Polls

[www.efcg.com/attendee-access](http://www.efcg.com/attendee-access)

(All Times in Mountain Time)

Thursday, March 5, 2026

**8:30 am – 9:00 am**  
Grand Ballroom &  
Foyer

**Breakfast Meet-and-Greet**

**9:00 am – 9:15 am**  
Grand Ballroom

**Introductory Remarks**

**9:15 am – 10:30 am**  
Grand Ballroom

**Session 1: EFCG AEC Industry Overview**

Managing Partner Rebecca Zofnass will open the 2026 EFCG CFO Conference with insights from EFCG's AEC Industry Overview Report, developed from EFCG's extensive proprietary database of financial and business metrics. This presentation will feature the first look at 2025 industry performance and projections through 2027. Zofnass will highlight the industry's core financial metrics, diving into revenue and margin trends, backlog signals, and forward-looking growth expectations. Zofnass will also distill the major forces shaping profitability and efficiency, equipping CFOs with clarity on the dynamics driving capital decisions and strategic planning in 2026 and beyond.

**Presenter:** Rebecca Zofnass, EFCG Managing Partner, Strategy & Corporate Finance

**10:30 am – 11:00 am**  
Grand Ballroom Foyer

**Morning Coffee Social**

**11:00 am – 11:45 am**  
Grand Ballroom

**Session 2: State of the Industry Through the Lens of Influential CFOs**

Join instrumental finance leaders as they examine the evolving landscape of the AEC industry and share how current trends including talent scarcity, pricing pressures, AI adoption, and more, are shaping their strategic priorities in the next 1-2 years. This discussion will explore the decisions driving growth and innovation in an era of unprecedented change. Attendees will gain a forward-looking view of the industry through the lens of CFOs who are continuously assessing market shifts and identifying opportunities that define success.

**Moderator:** Rebecca Zofnass, EFCG Managing Partner, Strategy & Corporate Finance

**Panelists:**

Amy Davis, CFO, RS&H  
Charul Doshi, CFO, Trilon Group  
Rich Lee, CFO, GISI  
Alain Michaud, CFO, WSP Global

**11:45 am – 12:00 pm**  
Grand Ballroom

**CFO of the Year Announcement**

**12:00 pm – 1:00 pm**  
EDGE Restaurant,  
Lobby Level

**Lunch**

(All Times in Mountain Time)

Thursday, March 5, 2026

1:15 pm – 2:00 pm

Aspen Room

### Session 3: Breakout Sessions

#### 3A: M&A in AEC: High Impact Advisors & Partners Across the Deal Cycle

A merger or acquisition succeeds when the right advisors and partners are engaged at the right points in the deal cycle. In this breakout, high impact experts in tax, accounting, and law will share where they contribute, the risks they mitigate, common pitfalls they see, and how they help unlock value from pre-LOI through integration. Attendees will walk away with a clear understanding of the differentiated value these advisors and partners can bring, and the questions leadership teams should ask before, during, and after a deal.

**Moderator:** Emily Shaw, EFCG Senior Vice President, M&A

**Panelists:**

Joanne Baginski, Partner, Plante Moran

Alexandra F. Metzl, Shareholder, Brownstein Hyatt Farber Schreck, LLP

Elm Room

#### 3B: Defining Your Safety Quotient: Maximizing Profitability by Protecting Employees

Discover why today's top performing organizations treat safety as a strategic advantage—not just a compliance requirement. When companies elevate safety to a core business priority, they unlock meaningful improvements in utilization, operational efficiency, financial performance, and long-term margin growth. When safety is woven into culture, processes, and decision-making, its benefits compound year after year—ultimately becoming a powerful engine for sustained profitability and performance. Learn how reframing safety as a strategic investment can transform your organization's operational and financial outcomes.

**Presenters:**

Kent Collier, JD, Managing Principal, Greyling Insurance Brokerage & Risk Consulting, a division of EPIC

Kriton A. Pantelidis, JD, Principal, Greyling Insurance Brokerage & Risk Consulting, a division of EPIC

Jeaninne Ryan, Principal, Greyling Insurance Brokerage & Risk Consulting, a division of EPIC

2:15 pm – 2:45 pm

Grand Ballroom

### Session 4: Today's Tech Trends & AI Workforce Resilience

In this session, Marcus Quigley, EFCG's Technology & Innovation Practice Lead, will break down the major technology and AI trends reshaping the AEC industry and outline how firms can close the widening AI talent gap. Drawing on EFCG's latest data and our AI Workforce Resilience model, Quigley will highlight where automation and AI present the greatest near-term opportunities and what capabilities will define the next generation of AEC professionals, all with the goal of answering the question "can AI close the talent gap?" Quigley will translate these trends into actionable strategies, covering workforce enablement, upskilling, cultural readiness, and the organizational shifts required to build a resilient, AI-powered workforce, setting the stage for the panel discussion that follows.

**Presenter:** Marcus Quigley, EFCG Partner, Technology & Innovation

(All Times in Mountain Time)

Thursday, March 5, 2026

2:45 pm – 3:25 pm  
Grand Ballroom

### Session 5: Tech & AI: Effective Financial Team Technologies

How are CFOs evaluating the next wave of financial technologies and AI tools? Which solutions have already proven their worth? This session will dive into the strategic considerations behind tech adoption, from assessing ROI and integration challenges to aligning tools with firm-wide objectives. Panelists will share candid insights on their decision-making frameworks and highlight the platforms, automation solutions, and analytics tools currently driving efficiency and better forecasting within their finance teams. Attendees will leave with new thought processes and practical applications to consider that are shaping modern financial leadership.

**Moderator:** Marcus Quigley, EFCG Partner, Technology & Innovation

**Panelists:**

Dinakar Hituvalli, EVP & Chief Product & Technology Officer, Deltek  
Galen Meysenburg, CFO, HDR  
Victor Suchodolski, CEO, Sargent & Lundy

3:40 pm – 4:25 pm  
Aspen Room

### Session 6: Breakout Sessions

#### 6A: Tech & AI: Operationalizing AI Across the Business: Practical Steps A&E CFOs Are Taking Now

Across the A&E industry, CFOs are moving from AI exploration to the real work of operationalizing it across financial processes and decision making. Many firms still face challenges with scaling automation, reducing manual effort, and building integrated workflows. This fireside chat will spotlight how leading organizations are making meaningful progress—including IMEG, which now automates a sizable part of its invoice routing workflow through machine learning and intelligent task orchestration. Expect a candid discussion focused on what is working today and the practical steps CFOs can take to strengthen AI enabled operations.

**Moderator:**

Greg Connolly, Senior Director, Solutions Engineering, Deltek

**Panelists:**

Roland Pulley, CFO, IMEG Group  
Marcus Quigley, Partner, Technology & Innovation, EFCG

Elm Room

#### 6B: Preserving Wealth, Protecting Legacy: Personal Insurance for Financial Stewards

This session is designed exclusively for CFOs who are not only stewards of their organizations' financial health but also guardians of their personal wealth and legacy. Join us to explore how tailored personal insurance solutions can safeguard your assets, mitigate risks, and ensure long-term financial resilience. Drawing insights from Gallagher's Private Client State of the Market Report, we will discuss strategies to navigate the evolving insurance landscape, address complex risks, and leverage innovative solutions like captives and umbrella liability coverage. Discover how proactive risk management and customized insurance programs can protect your lifestyle, assets, and legacy for generations to come.

**Presenters:**

Tierney Aldridge, Private Client Advisor, Gallagher Private Client  
Betsy Clement, Managing Director of Growth & Sales Strategy, Gallagher Private Client

(All Times in Mountain Time)

**Thursday, March 5, 2026**

**4:45 pm – 5:30 pm**  
Grand Ballroom

### Session 7: Turning Pricing Pressures Into Pricing Strategy: Who Pays for Progress?

As AI and other AEC innovations reshape delivery, CFOs face a paradox: efficiencies rise while upfront investment and change costs climb, yet clients expect prices to remain consistent or even fall. This panel explores how firms quantify and communicate added value (e.g., risk reduction, speed, quality), adopt pricing models (e.g., value based, outcome linked, tiered), and set transparency guardrails. We'll discuss who should fund innovation - the client, the project, or the firm - and practical tactics to avoid margin erosion while turning pressure into a sustainable pricing strategy.

**Moderator:** Emma Orr, EFCG Vice President, Strategy & Corporate Finance

**Panelists:**

Marc Armstrong, CFO, GHD  
Craig Denson, CFO, HNTB  
Brigitte Doolan, CFO, BSC Group  
Matt Hardesty, CFO, Apex Companies

**5:30 pm – 5:35 pm**  
Grand Ballroom

### The Day's Closing Remarks

**6:00 pm – 8:00 pm**  
Tamayo

### Evening Networking Reception & Dinner

1400 Larimer Street  
Denver, CO 80202

**TAMAYO**  
BY CHEF RICHARD SANDOVAL

Join fellow attendees for dinner at Tamayo, an acclaimed Richard Sandoval restaurant known for its contemporary Mexican cuisine and handcrafted margaritas. Located on a stunning rooftop with sweeping views of the Rocky Mountains and downtown Denver, Tamayo offers the perfect setting to unwind, connect, and experience Sandoval's award-winning hospitality.



(All Times in Mountain Time)

Friday, March 6, 2026

**8:15 am – 9:00 am**  
Aspen Room

### Roundtables with Breakfast

#### Small-Firm Roundtable

Designed for small-firm leaders, this roundtable provides a dedicated forum to explore the unique dynamics of operating and growing firms under \$50M in revenue. Attendees will discuss shared challenges, opportunities, and practical strategies with peers of comparable size and scale.

#### PE-Backed Firm Roundtable

This focused roundtable is for leaders from PE-backed firms to discuss the distinct strategic needs shaping their business environment. Participants will exchange insights, compare experiences, and share best practices with peers navigating similar ownership structures.

**8:30 am – 9:00 am**  
Grand Ballroom &  
Foyer

### General Breakfast Reconnect for All Attendees

For those not participating in the breakfast roundtable discussions, you are invited to start your morning by joining fellow attendees in a relaxed, informal setting. Enjoy light breakfast fare while catching up on conversations, expanding your network, and setting the tone for a productive day.

**9:00 am – 9:10 am**  
Grand Ballroom

### Introductory Remarks

**9:10 am – 10:00 am**  
Grand Ballroom

### Session 8 Keynote: Phillip A. Washington, Denver International Airport CEO

In his keynote address, Phillip A. Washington, CEO of Denver International Airport (DEN), will describe the challenges airport CEOs are facing in the current business environment while sharing how one of the world's largest and most complex infrastructure systems is advancing. Airports bring together every dimension of the built environment—transportation networks, energy systems, water management, waste operations, and landscape planning—making them a powerful microcosm of the AEC industry. Washington will share details of how DEN is committed to building vital infrastructure for the future.

**Presenter:** Phillip A. Washington, CEO, Denver International Airport

**10:15 am – 10:45 am**  
Grand Ballroom

### Session 9: M&A Trends & the 2026 Outlook

Managing Partner Jessica Zofnass Barclay will deliver a highly anticipated in-depth look at the latest M&A multiples, deal activity, and emerging market dynamics shaping 2026. Drawing from EFCG's proprietary M&A database, Barclay will break down the forces influencing valuation shifts, buyer and seller behavior, capital availability, and sector specific patterns that matter most for CFOs. This session will provide a forward-looking view of where the market is headed, highlighting the opportunities, risks, and strategic considerations that finance leaders should plan for as they refine their firms' M&A strategies for the year ahead.

**Presenter:** Jessica Zofnass Barclay, EFCG Managing Partner, M&A

(All Times in Mountain Time)

**Friday, March 6, 2026**

**10:45 am – 11:30 am**  
**Grand Ballroom**

### Session 10: Winning M&A Strategies and What's Next for the Year Ahead

CFOs are at the center of shaping M&A opportunities that drive growth and resilience in the AEC industry. Leaders who have led pivotal transactions will share firsthand playbooks for sourcing the right opportunities, structuring deals for long-term value, and executing integrations that stick. Building on the trends outlined in Session 9, the panel will then look ahead to 2026, highlighting the smart moves CFOs are making now to position their firms for the future.

**Moderator:** Jessica Zofnass Barclay, EFCG Managing Partner, M&A

**Panelists:**

Sean Baker, CFO, Olsson  
Mark Hardaway, CFO, Verdantas  
Chris Nelson, CFO, Consertus  
John Take, EVP, Chief Growth & Innovation Officer, Stantec

**11:50 am – 12:30 pm**  
**Grand Ballroom**

### Lunch & Session 11: Succession by Design: CFO Transition Strategies

Succession planning is a critical responsibility for CFOs, yet it is often overlooked, with 40% of firms lacking a formal CFO succession plan. In this session, CFOs will walk through their own succession planning approaches from identifying key decision points and engaging the right stakeholders at the right times, to assessing internal versus external candidates. They'll share what they are doing today to build a strong team bench and set up a smooth, confidence preserving transition once a formal process begins. Attendees will leave with practical steps they can apply immediately, no matter where they are in their succession planning journey.

**Moderator:** Julie Hasiba, EFCG Managing Partner, Talent & Compensation

**Panelists:**

Tammy Flanagan, CFO, Kimley-Horn  
David Quinn, CFO, McKim & Creed  
Michael Williams, CFO, Black & Veatch

**12:30 pm – 12:35 pm**  
**Grand Ballroom**

### Conference Closing Remarks

**12:35 pm – 1:00 pm**  
**Grand Ballroom Foyer**

### Closing Coffee & Conversation

Share ideas and exchange information with fellow attendees as we wrap up the 2026 EFCG CFO Conference and look forward to reconnecting at the 2027 EFCG CFO Conference, taking place **April 26–28, 2027** at The Ritz-Carlton Dallas, Las Colinas!



April 26-28, 2027

The Ritz-Carlton Dallas  
Las Colinas

Las Colinas, TX