



# EFCG

Environmental Financial  
Consulting Group

# 2025 CEO Conference

For the Architecture, Engineering, and Consulting (AEC) Industry



Photographs provided by Taste in Hotels

## Sponsorship Partners

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Agenda  
September 29 - October 1

WALDORF ASTORIA®  
MONARCH BEACH RESORT & CLUB

# WELCOME



**EFCG**  
Environmental Financial  
Consulting Group

## CEO CONFERENCE September 29-October 1, 2025



### 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



**EFCG**  
Environmental Financial  
Consulting Group

# CEO CONFERENCE

## September 29-October 1, 2025



## SPONSORSHIP PARTNERS

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



### **BST Global**

BST Global designs, develops and deploys the AEC industry's first suite of AI powered project intelligence™ solutions. Beyond our flagship ERP offering, we provide work management, predictive insights and resource management solutions to complement a firm's existing ERP. More than 120,000 architects, engineers and consultants in 65 countries across six continents rely on BST Global's solutions each day to successfully manage their projects, resources, finances and client relationships. With unrivaled industry knowledge, BST Global serves as a trusted partner to its clients and remains at the forefront of innovation. Visit [www.bstglobal.com](http://www.bstglobal.com).



### **Deltek**

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 30,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. Visit [www.deltek.com](http://www.deltek.com).



### **Greyling**

Greyling Insurance Brokerage & Risk Consulting, a division of EPIC, is a specialty brokerage serving professional services firms in the construction industry, including a leading share of the ENR Top 500 Design Firms. Greyling's differentiator is the depth of our team, which includes not only dozens of experienced insurance professionals but also numerous attorneys and consultants who have varied relevant expertise working for and representing design and construction companies. This experience results in meaningful project and enterprise risk management, exceptional and innovative insurance placement, and a trusted partner watching out for your bottom line. Visit [www.greyling.com](http://www.greyling.com).



### **TRANSEARCH**

TRANSEARCH is the global leader in executive search and leadership consulting. We build teams of transformational leaders who can stay one step ahead of a changing world. We are founded on a culture of partnership with a strong focus on excellence. Our vision is to move beyond what is defined as leadership and talent acquisition. We are motivated by what is "right" for our clients (and anticipating where they are going) and becoming a yardstick for quality. We are always pushing the envelope to stay ahead of the curve. Through proprietary innovation, world-class industry experts, and an unparalleled global network, we will find the right leader for your business – someone who will seamlessly integrate and be successful from day one. Visit [www.transearch.com](http://www.transearch.com).

## ABOUT EFCG'S CEO CONFERENCE

EFCG will welcome over 250 CEOs to this invitation-only event, designed to tackle the AEC industry's most significant financial and strategic challenges. This event leverages EFCG's exclusive 2025 CEO Survey and over 35 years of proprietary industry data to provide invaluable insights and guidance on trends. All attendees receive EFCG's 2025 AEC Industry Report.

Come hear the industry's reported 2024 performance, 2025 expectations, and 2026 projections. Stay to connect with experts and thought leaders as more than 40 speakers cover today's most pressing topics. Walk away with a CEO network gained throughout 20+ events and sessions.

### Dates & Times

Monday, September 29, 2:00 pm – 8:00 pm PT  
Tuesday, September 30, 7:30 am – 8:30 pm PT  
Wednesday, October 1, 7:30 am – 5:00 pm PT

### Hotel & Conference Venue Information

#### Waldorf Astoria Monarch Beach Resort & Club

1 Monarch Beach Resort  
Dana Point, California

The entirety of the 2025 CEO Conference will be held at The Waldorf Astoria Monarch Beach Resort & Club, an award-winning resort offering premier concierge services, luxurious amenities, and world-class dining. During the free time built into the event agenda, we encourage you to enjoy the many amenities the resort has to offer.

### Drive to/from Airports

Orange County John Wayne (SNA): 20 miles, Approximately 30 minutes  
Long Beach Airport (LGB): 41 miles, Approximately 45 minutes  
Los Angeles International Airport (LAX): 61 miles, Approximately 80 minutes

### Dress Code

Business casual

### 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.



Perched atop a 150-foot seaside bluff, this resort offers the perfect blend of Southern California's laid-back luxury and sincere service.



# CEO CONFERENCE

## September 29-October 1, 2025

*(All Times in Pacific Time)*

**Monday, September 29, 2025**

**2:00 pm – 3:00 pm**

**Optional Welcome Activities: Restorative Coastal Hike or Instructor-Led Beach Meditation** \*Advance registration required

**3:30 pm – 4:00 pm**

**First-Time Attendee Welcome Event**

**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)**

**5:00 pm – 6:00 pm**

**Women in Leadership Event**

**6:00 pm – 8:00 pm**

**Conference Welcome Reception & Dinner**

**Tuesday, September 30, 2025**

**7:30 am – 8:15 am**

**Breakfast Meet-and-Greet**

**8:30 am – 10:00 am**

**Session 1: EFCG AEC Industry Overview**

**10:00 am – 10:30 am**

**Morning Coffee Social Hosted by Brownstein Hyatt Farber Schreck, LLP**

**10:30 am – 11:15 am**

**Session 2: CEO Reactions: Industry Leaders on Today's Trends**

**11:15 am – 12:15 pm**

**Lunch & CEO of the Year Announcement**

**12:15 pm – 1:00 pm**

**Session 3: AEC 2035: CEO Visions for the Industry's Future**

**1:15 pm – 2:00 pm**

**Session 4: Breakout Sessions**

- 4A: AEC 2030 | The Rise of the AI-Powered + Data-Driven “Superconsultancy”
- 4B: Getting the Most Out of Your In-House Legal & Risk Management Team
- 4C: Leading Growth Through Employee-Ownership
- 4D: AEC Sustainability Reimagined: Strategy, Value, & Resilience

**2:10 pm – 3:00 pm**

**Session 5: AI, Talent, and the Future of Work in AEC**

**3:15 pm – 4:10 pm**

**Session 6: Defining Moments: Lessons Learned from the Top**

**4:10 pm – 6:30 pm**

**Free Time to Enjoy Resort Amenities**

**6:30 pm – 8:30 pm**

**Evening Networking Reception & Dinner**

**Wednesday, October 1, 2025**

**7:30 am – 8:15 am**

**Breakfast Reconnect & Continuing the Conversation**

**8:30 am – 9:30 am**

**Session 7: Strategic M&A Trends and Pivotal Deals**

**9:30 am – 9:45 am**

**Morning Coffee Social Hosted by Brownstein Hyatt Farber Schreck, LLP**

**9:45 am – 10:25 am**

**Session 8: Succession by Design: CEO Transition Strategies**

**10:35 am – 11:00 am**

**Session 9: Driving Employee Commitment Through Culture and Impact**

**11:15 am – 12:00 pm**

**Session 10: Breakout Sessions**

- 10A: Investing for Growth: Back Office Strategy for Smaller Firms
- 10B: Succession in Practice: Reflections from CEOs and CEO-Elects
- 10C: Leading an AI-Integrated Firm: Aligning Gen AI with Firm Values

**12:20 pm – 1:00 pm**

**Lunch & Session 11: The US Administration’s Impact on the AEC Industry**

**1:15 pm – 5:00 pm**

**Lunch (Continued) & Free Time (Optional Golf Activity \*Advance registration required)**



*(All Times in Pacific Time)*

**Monday, September 29, 2025**

**2:00 pm – 3:00 pm**

**Optional Welcome Activities**



Advance registration is required for each of the activities below. For more information, please contact Bambi Rogers at brogers@efcg.com.

**Option 1: Restorative Coastal Hike**

**Option 2: Instructor-Led Beach Meditation**

**3:30 pm – 4:00 pm**

**Pacific Ballroom  
Promenade & Terrace  
3rd Floor**

**First-Time Attendee Welcome Event**

It is our pleasure to welcome new attendees to our event each year. Join us for the official opening of the 2025 CEO 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**

**Pacific Ballroom  
3rd Floor**

**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

**5:00 pm – 6:00 pm**

**Sunset Terrace**

**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 & Dinner.

**6:00 pm – 8:00 pm**

**Grand Lawn**

**Conference Welcome Reception & Dinner**



Known as a premier culinary destination, the Waldorf Astoria Monarch Beach Resort & Club promises an unforgettable experience. Enjoy food and drinks with fellow attendees as you take in beautiful sunset views along the California coast. This is the perfect setting to unwind, connect, and enjoy the best of coastal hospitality.



*(All Times in Pacific Time)*

**Tuesday, September 30, 2025**

**7:30 am – 8:15 am**  
Pacific Ballroom Lawn

**Breakfast Meet-and-Greet**

**8:30 am – 10:00 am**  
Pacific Ballroom  
3rd Floor

**Session 1: EFCG AEC Industry Overview**

Managing Partner Rebecca Zofnass will begin the 2025 EFCG CEO Conference with the unveiling of EFCG’s highly anticipated AEC Industry Overview Report. This proprietary dataset offers a comprehensive analysis of the industry’s critical financial and strategic metrics, including current performance and projections for the year ahead. Zofnass will spotlight the most influential trends shaping firm strategies today, with a particular focus on how technology is emerging as the central force behind the rapid changes across the AEC landscape—from driving innovation to reshaping business models and redefining competitive advantage in the years ahead.

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

**10:00 am – 10:30 am**  
Pacific Ballroom Terrace  
3rd Floor

**Morning Coffee Social Hosted by Brownstein Hyatt Farber Schreck, LLP**

**10:30 am – 11:15 am**  
Pacific Ballroom  
3rd Floor

**Session 2: CEO Reactions: Industry Leaders on Today's Trends**

Join CEOs as they take a deeper dive into the most pressing trends shaping the AEC industry and how these forces are shaping their firm strategies over the next 1–2 years. From innovation and talent to market shifts and global challenges, this session offers a front-row seat to hear how leaders are navigating change and positioning their organizations for what’s next.

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

**Panelists:**

Greg Kelly, CEO, STV  
Mike Orth, CEO, Gannett Fleming TranSystems  
Gayle Packer, President & CEO, Terracon  
Victor Suchodolski, Chairman, President & CEO, Sargent & Lundy

**11:15 am – 11:30 am**  
Pacific Ballroom  
3rd Floor

**CEO of the Year Announcement**

**11:30 am – 12:15 pm**  
Pacific Ballroom Lawn

**Lunch**

**12:15 pm – 1:00 pm**  
Pacific Ballroom  
3rd Floor

**Session 3: AEC 2035: CEO Visions for the Industry's Future**

What will the AEC industry look like a decade from now—and what must leaders do today to shape that future? In this forward-looking session, top CEOs will share bold, long-range visions for 2035, building on the strategic insights of today. From transformative technologies and shifting global dynamics to workforce evolution and changing client demands, this panel will explore the forces that could redefine the industry—and what it will take for firms to lead, adapt, and thrive. Join us for a conversation about the future of AEC and the leadership mindset it demands.

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

**Panelists:**

Javier A. Baldor, CEO, BST Global  
Dan Batrack, CEO & President, Tetra Tech  
Leslie Duke, Chair & CEO, Burns & McDonnell  
Jesse Kropelnicki, CEO, Verdantas



**(All Times in Pacific Time)**

**Tuesday, September 30, 2025**

**1:15 pm – 2:00 pm**

**Aegean Room  
3rd Floor**

**Atlantic Room  
3rd Floor**

**Pacific Ballroom  
3rd Floor**

**Session 4: Breakout Sessions**

**4A: AEC 2030 | The Rise of the AI-Powered + Data-Driven “Superconsultancy”**

By 2030, the AEC landscape as we know it will be radically different and transformed. In this forward-looking presentation, BST Global Chief Executive Officer Javier A. Baldor explores converging megatrends within AI, big data, and emerging tech that will define who wins and who falls by the wayside. Javier introduces the concept of the “Superconsultancy 2030,” a firm that is powered and driven by all things AI and data, and explores how:

- GenAI-powered super agents will revolutionize work and project delivery
- A data-driven model fueled by AI, machine learning and big data will transform how you run your consultancy
- Legacy business models must evolve from time-based billing to value-driven offerings in the AI era
- Your firm can move beyond traditional project-based services and embrace data-centric products
- AI-native and data technology entrants will disrupt the AEC competitive landscape

Javier delves into real-world use cases from some of the world’s preeminent AEC firms, including AtkinsRéalis, Jacobs, Parsons, Stantec and WSP, which presented at BST Global’s 2025 AI Summit. The message is clear: The opportunities and future before us require everyone to think differently — not only to survive but also to thrive in the AI era.

**Presenter:** Javier A. Baldor, CEO, BST Global

**4B: Getting the Most Out of Your In-House Legal & Risk Management Team**

Join Greyling/EPIC’s unique panel of experts, including a former in-house general counsel, former outside defense counsel, and career insurance specialist, to hear strategies for maximizing your executive team’s utilization of in-house legal and risk management resources. Greyling/EPIC will answer questions such as optimal makeup of in-house teams considering firm size and type, the in-house counsel’s role in claims, how and where in-house counsel should best spend their time, how in-house counsel contributes to M&A activity, networking and training opportunities, and ideal interfacing between in-house and external resources, including brokers, attorneys, consultants, and advisors.

**Presenters:** Greyling Insurance Brokerage & Risk Consulting, a division of EPIC  
Kent Collier, JD - Managing Principal  
Jeaninne Ryan, Principal  
Roger Guilian, JD - Senior Vice President

**4C: Leading Growth Through Employee-Ownership**

As the AEC industry faces generational transitions, talent retention challenges, and evolving definitions of value, employee ownership is emerging as a powerful lever for long-term growth. This session will explore how CEOs can use ownership not just as a financial structure, but as a strategic tool to align leadership, deepen employee commitment, and build resilient, high-performing firms. Through insights and peer discussion, this session will detail how ownership culture can drive innovation, succession planning, and sustainable value creation—while reinforcing purpose and performance at every level. Panelists will also speak from experience as they address the practical challenges that employee-owned firms must anticipate and plan for proactively.

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

**Panelists:**

Jessica Baker Daily, President & CEO, Halff Associates  
Brian Coltharp, President & CEO, Freese & Nichols  
Dan Larson, CEO, American Engineering Testing  
Andy McCune, President & CEO, Wade Trim



*(All Times in Pacific Time)*

**Tuesday, September 30, 2025**

**1:15 pm – 2:00 pm**

**Adriatic Room  
3rd Floor**

**Session 4: Breakout Sessions (Continued)**

**4D: AEC Sustainability Reimagined: Strategy, Value, & Resilience**

As ESG skepticism and tightening federal support collide with mounting climate-driven losses, AEC firms find themselves at a strategic crossroads. Clients are demanding practical, cost-effective sustainability and adaptation solutions - ones that align with real business goals. For firms, this requires clarifying their purpose, rethinking their market focus, and innovating business models for resilience and relevance. This breakout session invites forward-thinking CEOs to explore how sustainability—when reframed as core strategy—can drive differentiation, growth, and long-term value.

**Presenter & Moderator:** Andreas Georgoulas, EFCG Director, Sustainability & ESG

**Panelists:**

Robert Bryan, President & CEO, ENERCON  
Dr. H. Kit Miyamoto, Global CEO, Miyamoto International

**Afternoon Refresh Break**

**2:00 pm – 2:10 pm**

**Pacific Ballroom Terrace  
3rd Floor**

**2:10 pm – 3:00 pm**

**Pacific Ballroom  
3rd Floor**

**Session 5: AI, Talent, and the Future of Work in AEC**

The persistent talent shortage is no longer just a workforce issue—it’s a strategic imperative. To frame the challenge, EFCG will provide a snapshot of where the highest opportunities for automation sit today and why firms keep returning to a single question: Can AI close the talent gap? CEOs from cutting-edge AEC firms will share their perspectives on how firms can start to answer this question by integrating AI into their operations. From deploying AI copilots that reduce repetitive drafting to leveraging collaboration tools that extend the reach of scarce experts, these CEOs will offer insights into what their firms are doing to further enable their future workforce. They will also explore the cultural shifts that accompany these changes, including how firms are balancing automation with upskilling, professional identity, and long-term talent development. This is a conversation about what’s working, what’s emerging, and what remains uncertain as the industry evolves.

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

**Panelists:**

Raj Arora, CEO, Jensen Hughes  
Bob Hughes, President & CEO, Deltek  
Clifton Oertli, President & CEO, NEI Electric Power Engineering  
Carey Smith, Chair, President & CEO, Parsons Corporation

**Afternoon Refresh Break**

**3:00 pm – 3:15 pm**

**Pacific Ballroom Terrace  
3rd Floor**

**3:15 pm – 4:10 pm**

**Pacific Ballroom  
3rd Floor**

**Session 6: Defining Moments: Lessons Learned from the Top**

In this intimate and reflective conversation, accomplished CEOs will recount the moments that have profoundly shaped their leadership and lives. They will share the story behind formative lessons they learned and how those experiences helped define who they are as CEOs today.

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

**Panelists:**

Rich D’Amato, Chair & CEO, Brown and Caldwell  
Hisham Mahmoud, Executive Chairman, Consor, Qualus, and Cumming Group  
Brad Strittmatter, President & CEO, Olsson  
Alyson Watson, Chair & CEO, Woodard & Curran



*(All Times in Pacific Time)*

**Tuesday, September 30, 2025**

**4:10 pm – 6:30 pm**

**Free Time to Enjoy Resort Amenities**

Make the most of your time at this iconic resort. Take advantage of the all-new Waldorf Astoria Spa, grab a chair by the pool, enjoy one of the hotel’s many workout classes, or explore the resort’s 175-acre grounds.

**6:30 pm – 8:30 pm**

**Botanical Lawn**

**Evening Networking Reception & Dinner**

We welcome you to relax with colleagues while you enjoy drinks and dinner stations in a refreshing, unique setting.

*(All Times in Pacific Time)*

**Wednesday, October 1, 2025**

**7:30 am – 8:15 am**

**Pacific Ballroom Lawn**

**Breakfast Reconnect & Continuing the Conversation**

**8:30 am – 9:30 am**

**Pacific Ballroom  
3rd Floor**

**Session 7: Strategic M&A Trends and Pivotal Deals**

As the AEC industry is expected to remain highly acquisitive, Managing Partner Jessica Zofnass Barclay will open this session with an overview of the latest M&A multiples and trends, drawing from EFCG’s comprehensive proprietary database to shed light on the forces driving major market shifts. She will then moderate a panel spotlighting two influential M&A transactions from 2025, where the CEOs and partners behind these deals will share the strategic thinking that guided them, reflect on their broader impact across the industry, and underscore the crucial factors that firms must get right when executing complex, high-stakes transactions.

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

**Panelists:**

Susan Angyal, CEO, North America, ERM  
Roy Block, CEO, Consertus  
Patrick Gobb, Partner, ERM NewFields  
Dev Krishnan, President & CEO, KKCS

**9:30 am – 9:45 am**

**Pacific Ballroom Terrace  
3rd Floor**

**Morning Coffee Social Hosted by Brownstein Hyatt Farber Schreck, LLP**

**9:45 am – 10:25 am**

**Pacific Ballroom  
3rd Floor**

**Session 8: Succession by Design: CEO Transition Strategies**

Succession planning is one of the most critical, and complex, responsibilities of a CEO, requiring years of foresight and preparation. In this thought-provoking session, discerning CEOs will share how their firms are identifying, developing, and empowering future CEOs. From cultivating the right candidates and building stakeholder confidence to ensuring smooth transitions and preserving organizational culture, this discussion will explore how these organizations are planning ahead to balance continuity with change—ultimately securing long-term growth and stability.

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

**Panelists:**

Mike Carragher, President, CEO & Chair, VHB  
Jim Stamatis, CEO, True Environmental  
Dave Sweeney, CEO & President, RS&H



**(All Times in Pacific Time)**

**Wednesday, October 1, 2025**

**10:25 am – 10:35 am**

**Pacific Ballroom Terrace  
3rd Floor**

**10:35 am – 11:00 am**

**Pacific Ballroom  
3rd Floor**

**11:00 am – 11:15 am**

**Pacific Ballroom Terrace  
3rd Floor**

**11:15 am – 12:00 pm**

**Aegean Room  
3rd Floor**

**Adriatic Room  
3rd Floor**

**Morning Refresh Break**

**Session 9: Driving Employee Commitment Through Culture and Impact**

Today’s engineering professionals want more than just a paycheck—they seek purpose, alignment with their values, and the opportunity to do meaningful work. EFCG data and research shows that professional development and a strong, purpose-driven culture are critical to fostering long-term employee engagement and retention. This session will explore how strategically chosen, high-impact projects—emphasizing adaptation, future-proof design, and long-term value—create opportunities for growth, learning, and mission-aligned work. These projects not only deepen employee commitment, but also improve utilization, enhance profitability, and strengthen client relationships.

**Moderator:** Andreas Georgoulas, EFCG Director, Sustainability & ESG

**Panelists:**

Mick Renshaw, CEO, Trilon Group

**Morning Refresh Break**

**Session 10: Breakout Sessions**

**10A: Investing for Growth: Back Office Strategy for Smaller Firms**

Making the decision to add non-billable staff to a small firm can be daunting. However, the right hire can serve as an accelerant to growth and profitability. Our panelists will discuss how they developed their approach to the back office, and how it enabled them to focus on growth.

**Presenters & Moderators:**

Emily Shaw, EFCG Senior Vice President, M&A

Vishal Menon, EFCG Vice President, Strategy & Corporate Finance

**Panelists:**

Chad Helmle, CEO & President, Craftwater

Regine Jeune, President, DB Sterlin

**10B: Succession in Practice: Reflections from CEOs and CEO-Elects**

Building on the insights from Session 8: Succession by Design, this breakout offers a rare opportunity to hear directly from the CEOs of VHB and RS&H—joined by their CEO-elects—for a candid conversation about their succession journeys. In this intimate setting, participants will explore what worked, what didn’t, and how each leader navigated the transition from their unique vantage point. With plenty of time reserved for audience questions, this session invites open dialogue to uncover the real-world dynamics behind a CEO succession, from building trust and preparing the organization to stepping into the role with clarity and confidence.

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

**Panelists:**

Bill Ashworth, CEO-Elect, VHB

Mike Carragher, President, CEO & Chair, VHB

Lisa Robert, CEO-Elect, RS&H

Dave Sweeney, President & CEO, RS&H



*(All Times in Pacific Time)*

**Wednesday, October 1, 2025**

**11:15 am – 12:00 pm**

**Pacific Ballroom  
3rd Floor**

**Session 10: Breakout Sessions (Continued)**

**10C: Leading an AI-Integrated Firm: Aligning Gen AI with Firm Values**

As generative AI reshapes the AEC industry, forward-thinking firms are exploring how to integrate these powerful tools in ways that enhance operations while staying true to their core values. In this session, Jay Margherio, EFCG’s Vice President of Technology & Innovation, will share how leading firms are aligning AI investments with strategic goals—streamlining workflows, improving analytics, and empowering teams across finance and beyond. CEOs will gain insights into practical applications of AI, governance considerations, and how to foster a culture of responsible innovation that supports long-term growth.

**Presenter:** Jay Margherio, EFCG Vice President, Technology & Innovation

**12:20 pm – 1:00 pm**

**Pacific Ballroom  
3rd Floor**

**Lunch & Session 11: The US Administration’s Impact on the AEC Industry**

The first 10 months of the Trump Administration and a new Congress have brought disruption that has and continues to create both opportunities and challenges for the AEC industry. A new law that locks in beneficial tax policies for the industry, coupled with a renewed focus on permitting and regulatory streamlining to move projects more efficiently, have been balanced against challenges in the renewable energy sector, the ongoing tariff agenda, and uncertainties in various federal agencies and programs that drive and fund projects in the built environment. ACEC’s Executive Vice President Steve Hall will brief attendees on the progress to date of the industry’s advocacy agenda—what’s done, what’s on the horizon, and what’s being done to manage disruption on behalf of the industry. Steve will also speak to the political cycle that hangs over the policy debate—early state races in 2025 to watch and the state of play for control of Congress in 2026.

**Presenter:** Steve Hall, Executive Vice President, ACEC National

**1:15 pm – 5:00 pm**

**Pacific Ballroom & Lawn  
3rd Floor**

**Lunch (Continued) & Free Time (Optional Golf Activity \*Advance Registration Required)**

Share a meal with fellow attendees and exchange information before enjoying the hotel’s amenities and activities at your leisure.

**\*Golf:** Advance registration is required to join an EFCG-coordinated tee time. For more information, please contact Bambi Rogers at brogers@efcg.com.

**2026 CEO Conference  
Early Registration Pricing**

**September 30-October 2  
2026**

**We welcome you to the Willis Tower Chicago—a historical landmark located in the heart of downtown Chicago, rich with character & legacy.**

**2027 CEO Conference  
Early Registration Pricing**

**October 12-14  
2027**

**This 3-day event will be held at the luxury Broadmoor Hotel, a Forbes Five-Star, AAA Five-Diamond Resort known for its hospitality and stunning mountain views.**