

# EFCCG

Environmental Financial  
Consulting Group

# 2023



## Chief Financial Officer Conference

April 19<sup>th</sup> – 21<sup>st</sup>  
Wednesday to Friday

Four Seasons Hotel Denver  
1111 14th Street, Denver, CO



# Chief Financial Officer Conference

For Architecture, Engineering, and Consulting Firms

## Event Overview

### EFCG is the leading advisor to AEC firms

EFCG’s mission is to provide a data-driven and strategic edge to Architecture, Engineering, and Consulting (AEC) firms to advance the innovation, sustainability, and success of the industry. In the last 33 years, EFCG has served as a retained advisor to 500+ firms, developed a proprietary industry database of financial and business metrics, held nearly 100 executive conferences, and advised on 180+ M&A transactions. The relationships we have formed with the CEOs, CFOs, and other key decision makers at every major AEC firm make us the most trusted financial, strategic, and M&A advisor.

#### Dates & Times

Wednesday, April 19<sup>th</sup> 6:00 pm – 7:30 pm MT  
Thursday, April 20<sup>th</sup> 8:30 am – 7:30 pm MT  
Friday, April 21<sup>st</sup> 8:30 am – 2:00 pm MT

#### Venue Location

Four Seasons Hotel Denver, 1111 14th Street, Denver, Colorado 80202

#### 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. Press will be invited to the event and may publish articles on the event and its sessions.

#### Attire

Business casual

### 2023 EFCG Conferences

- RLC 2023** **Rising Leaders**  
January 26-27, 2023
- CFO 2023** **Chief Financial Officer**  
April 19-21, 2023
- HR 2023** **HR Leadership**  
May 8-10, 2023
- TECH 2023** **Technology Leadership**  
June 8-9, 2023
- CEO 2023** **Chief Executive Officer**  
September 18-20, 2023

### EFCG Offerings For Your Firm



**Peer Benchmarking Analysis & Valuations**



**M&A Advisory**



**Sustainability & ESG Strategy**



**Technology Strategy**



**Talent Strategy**

# Chief Financial Officer Conference

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## Preliminary Agenda

*All times in Mountain Time*

### Wednesday, April 19, 2023

6:00 pm – 7:30 pm **Welcome Drinks**

### Thursday, April 20, 2023

8:30 am – 9:00 am **Breakfast Meet-and-Greet**

9:00 am – 10:30 am **Session 1: AEC Industry Overview: Critically Assessing the Data**

10:30 am – 11:00 am **Morning Coffee Social**

11:00 am – 11:45 am **Session 2: CFO Reactions**

11:45 am – 12:00 pm **CFO of the Year Announcement**

12:00 pm – 1:00 pm **Lunch**

1:00 pm – 1:45 pm **Session 3: Turning Tech Investment Into Higher Returns**

2:00 pm – 2:50 pm **Session 4: The Talent & Compensation Challenge: How Firms Are Planning for 2023**

2:50 pm – 3:10 pm **Afternoon Break**

3:10 pm – 4:00 pm **Session 5: Breakouts**

**Session 5A:** The Anatomy of an M&A Deal

**Session 5B:** Enhancing Your Firm's Cybersecurity Protection

**Session 5C:** Building a Better Business: Top 15 Metrics to Prioritize

**Session 5D:** Solving the "Data Puzzle"

4:10 pm – 5:00 pm **Session 6: CFO Lessons Learned**

5:15 pm – 7:30 pm **Evening Networking Reception & Dinner**

### Friday, April 21, 2023

8:30 am – 9:00 am **Breakfast Reconnect**

9:00 am – 10:00 am **Session 7: The Critical Role of the CFO in M&A Transactions**

10:10 am – 11:10 am **Session 8: How to Build Your Firm's Strategic Plan**

11:10 am – 11:30 am **Morning Coffee Social**

11:30 am – 12:10 pm **Session 9: Breakouts**

**Session 9A:** Strategic Budgeting and Forecasting

**Session 9B:** Managing Risk in a Downturn

**Session 9C:** R&D Tax Credits and Amortization

12:20 pm – 1:15 pm **Session 10: ESG Impact in 2023: Finding the Value and Managing the Success**

1:15 pm – 2:00 pm **Closing Coffee Conversation**

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## Preliminary Agenda

*All times in Mountain Time*

**Thursday, April 20, 2023**

8:30 am – 9:00 am **Breakfast Meet-and-Greet**

9:00 am – 10:30 am **Session 1: AEC Industry Overview: Critically Assessing the Data**

EFCG will deliver the first look at how the AEC Industry fared in 2022 – looking at 2022 actuals – and what firms are expecting in 2023. During this opening session, EFCG will present the results of EFCG’s exclusive 2023 CFO Survey, to see the shifts taking place in major financial and strategic data and trends, and then talk through what questions firms are now asking and how they are beginning to reassess their market position for continued success.

**Presenter:**

Rebecca Zofnass, EFCG Managing Partner, Financial & Strategic Advisory

10:30 am – 11:00 am **Morning Coffee Social**

11:00 am – 11:45 am **Session 2: CFO Reactions**

Hear from industry leaders as they talk about what’s on the horizon for their firms pertaining to the industry’s biggest trends and what they are seeing for 2023 and the coming years.

**Moderator:**

Julie Hasiba, EFCG Managing Partner, Talent Advisory

11:45 am – 12:00 pm **CFO of the Year Announcement**

12:00 pm – 1:00 pm **Lunch**

1:00 pm – 1:45 pm **Session 3: Turning Tech Investment Into Higher Returns**

Financial leaders from prominent firms will join this session to discuss where tech investment in the industry is going and what role AEC firms play in enabling that opportunity. The conversation will spark debate as panelists speak from experience on what really drives higher returns on tech investment, leaving audience members with ideas for what kinds of strategic and financial returns matter and how to achieve those returns.

**Presenter and Moderator:**

Marcus Quigley, EFCG Partner, Technology Advisory

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Thursday, April 20, 2023

2:00 pm – 2:50 pm

### Session 4: The Talent & Compensation Challenge: How Firms Are Planning for 2023

Talent remains to be the biggest topic for AEC firm leadership, as the industry continues to feel pressure from both internal and external competitors, higher turnover, recruitment challenges, and inflation. EFCG will address how firms are responding to these pressures with two of the most influential resources: compensation and benefits. Managing Partner Julie Hasiba will start by introducing current talent trends as well as insights from the results of EFCG's Annual Compensation Survey. CFOs from firms that have been especially successful with recruitment and retention will share some of their secrets to success, with perspectives on when it's all about the money – and when it's not.

#### Presenter and Moderator:

Julie Hasiba, EFCG Managing Partner, Talent Advisory

2:50 pm – 3:10 pm

### Afternoon Break

3:10 pm – 4:00 pm

### Session 5: Breakouts

**Session 5A:** The Anatomy of an M&A Deal

**Session 5B:** Enhancing Your Firm's Cybersecurity Protection

**Session 5C:** Building a Better Business: Top 15 Metrics to Prioritize

**Session 5D:** Solving the "Data Puzzle"

4:10 pm – 5:00 pm

### Session 6: CFO Lessons Learned

CFOs will reflect on the biggest challenges they have encountered in their careers and share the actionable takeaways gained from those influential moments.

#### Moderator:

Jessica Barclay, EFCG Managing Partner, M&A Advisory

5:15 pm – 7:30 pm

### Evening Networking Reception & Dinner



Questions? Email [dmillionis@efcg.com](mailto:dmillionis@efcg.com)



Visit [www.efcg.com](http://www.efcg.com)



Connect with Us! [efcg@efcg.com](mailto:efcg@efcg.com)

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Friday, April 21, 2023

8:30 am – 9:00 am **Breakfast Reconnect**

9:00 am – 10:00 am **Session 7: The Critical Role of the CFO in M&A Transactions**

CFOs with extensive M&A experience will share how they are able to be particularly effective in ensuring a successful transaction. After EFCG shows the latest M&A multiples and trends from its extensive M&A database and advisory work, the panel will then explore how those trends have changed – and will continue to change - with the shifting macroeconomic backdrop.

**Presenter and Moderator:**

Jessica Barclay, EFCG Managing Partner, M&A Advisory

10:10 am – 11:10 am **Session 8: How to Build Your Firm's Strategic Plan**

EFCG's head of Advisory, Rebecca Zofnass, will share the keys to success when developing your firm's strategic plan. Bringing her expertise from Bain & Company where she worked with CEOs, CFOs, and leadership teams to develop their strategic 5-year vision, Zofnass will talk through the process, and then open the conversation to CFOs who will talk about their approach to developing and executing their firm's vision and direction.

**Presenter and Moderator:**

Rebecca Zofnass, EFCG Managing Partner, Financial & Strategic Advisory

11:10 am – 11:30 am **Morning Coffee Social**

11:30 am – 12:10 pm **Session 9: Breakouts**

**Session 9A:** Strategic Budgeting and Forecasting

**Session 9B:** Managing Risk in a Downturn

**Session 9C:** R&D Tax Credits and Amortization

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Friday, April 21, 2023

12:20 pm – 1:15 pm

### **Session 10: ESG Impact in 2023: Finding the Value and Managing the Success**

During this conference-closing session, Andreas Georgoulas, EFCG's Director of Sustainability & ESG, will examine how firms can expand their sustainability and ESG capabilities both internally as well as toward client-facing work to capture significant value add opportunities. With his experience completing sustainability and ESG assessments for over \$20 billion worth of infrastructure assets and EC firms, Georgoulas will speak to how a robust ESG strategy and framework can help firms focus their sustainability and ESG priorities and identify the right performance indicators to achieve and monitor meaningful progress. Georgoulas will then welcome panelists on stage to discuss the real ESG opportunity in this industry and what they are doing to effectively measure and communicate their firm's impact. Attendees will walk away with inspiration for ways to move ESG planning forward.

#### **Presenter and Moderator:**

Andreas Georgoulas, EFCG Director, Sustainability & ESG

1:15 pm – 2:00 pm

### **Closing Coffee Conversation**

***EFCG advances the innovation, sustainability, and success of the AEC industry***

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## Event Logistics

### Venue Location

Four Seasons Hotel Denver, 1111 14th Street, Denver, Colorado 80202

### Hotel Options & Nightly Pricing

Hotel	Walk to Four Seasons	Nightly Pricing
<a href="#">Four Seasons Hotel Denver</a> 1111 14th Street, Denver, Colorado 80202 +1 (303) 389-3000 <b>EFCG Room Block Pricing Deadline:</b> <i>March 20, 2023, rooms are limited</i>	N/A	\$335 (EFCG Price)
<a href="#">Hotel Teatro – Four Seasons Sister Hotel</a> 1100 14th Street, Denver, Colorado 80202 +1 (888) 727-1200	1 minute	\$250 - \$330
<a href="#">The Curtis Denver</a> 1405 Curtis Street, Denver, Colorado 80202 +1 (303) 571-0300	2 minutes	\$140 - \$315
<a href="#">The Westin Denver Downtown</a> 1672 Lawrence Street, Denver, Colorado 80202 +1 (303) 572-9100	6 minutes	\$229 - \$375

### Transportation Travel Time

Denver International Airport (DEN) to or From Four Seasons Denver Hotel

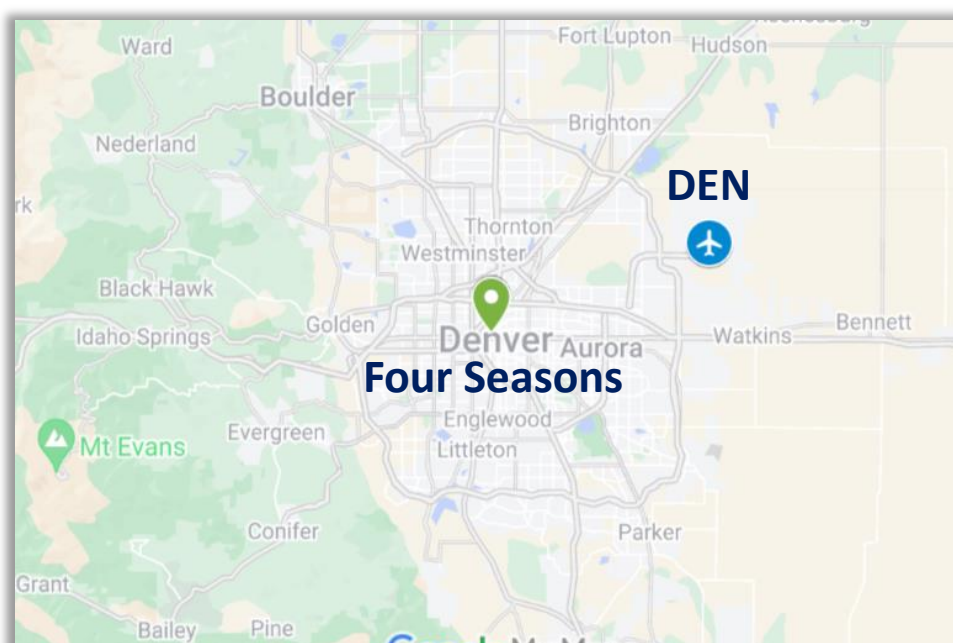
By Car: 20 – 40 minutes

By Train: 65 – 75 minutes

*Requires a 15-minute walk or a 5-minute drive from Union Station to the hotel*

The Four Seasons Hotel Denver offers guest parking for \$55 per day and pre-arranged taxi or limousine airport services upon request. Call +1 (303) 389-3000 for guest support.

### Venue Location in Relation to Airport



### Venue Location in Relation to Hotel Options

