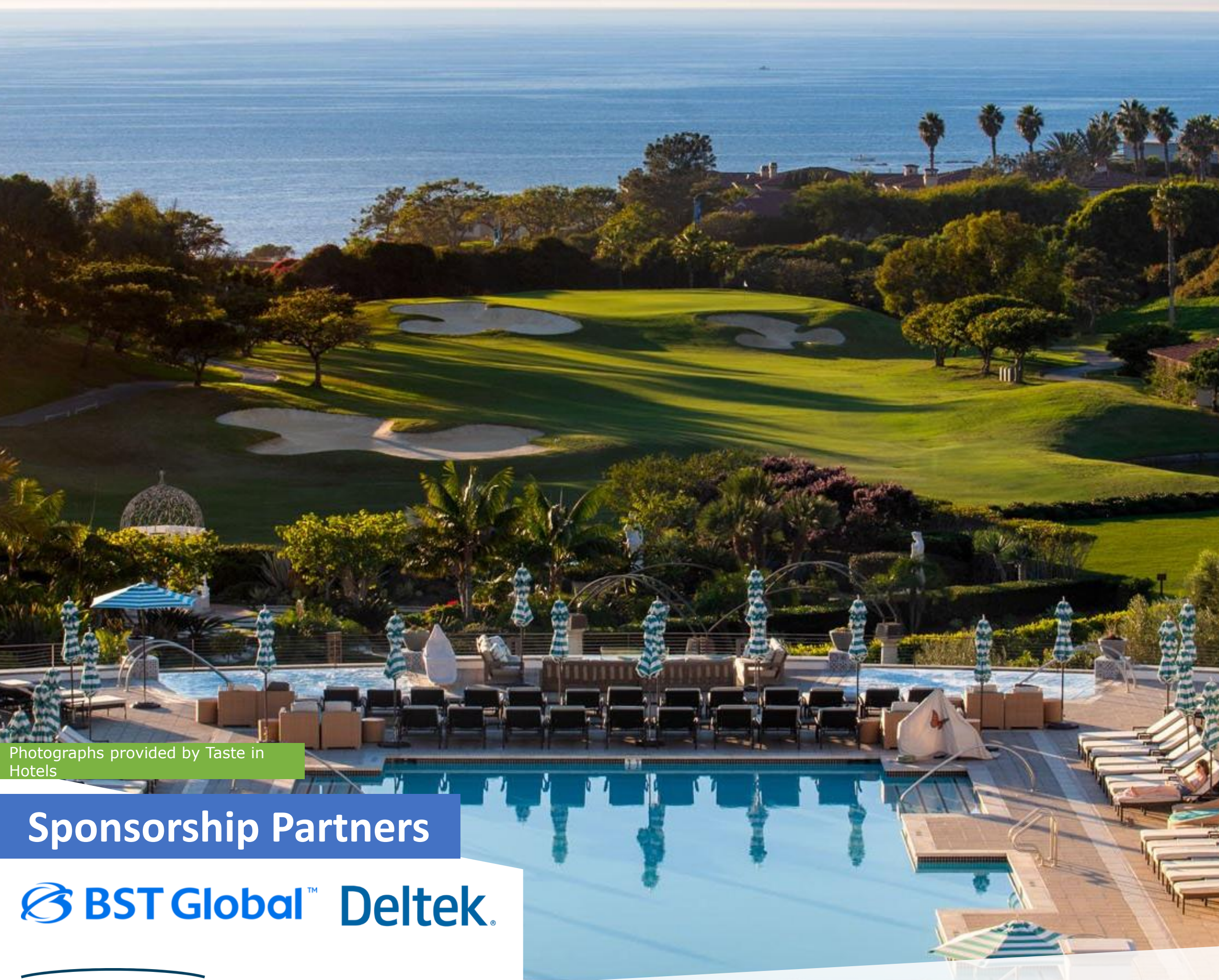




**EFCG**  
Environmental Financial  
Consulting Group

# 2025 CEO Conference

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



Photographs provided by Taste in Hotels

## Sponsorship Partners

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Preliminary Agenda  
September 29 – October 1

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# WELCOME



**EFCG**  
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## CEO CONFERENCE

September 29-October 1, 2025



WALDORF ASTORIA®  
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### ABOUT EFCG

EFCG is the premier 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 the most 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 the most trusted advisor.



**EFCG is the leading advisor to AEC firms, providing expertise in:**

#### 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 the most comprehensive proprietary database in the industry

**6**

Annual  
Surveys

**8M+**

Data Points  
Every Year

**500+**

Database  
Contributing Firms



**EFCG**  
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# 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).







**EFCG**  
Environmental Financial  
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# CEO CONFERENCE

## September 29-October 1, 2025



**WALDORF ASTORIA**  
MONARCH BEACH RESORT & CLUB

## ABOUT EFCG'S CEO CONFERENCE

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

Come to hear the AEC Industry's reported 2024 performance, 2025 expectations, and 2026 projections. Stay to connect with experts and thought leaders as over 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, 8:00 am – 8:30 pm PT

Wednesday, October 1, 8:00 am – 5:30 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.

Booking links with preferred rates will be provided as available with your conference confirmation email.

### 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.

Photographs provided by Waldorf Astoria



(All Times in Pacific Time)

Monday, September 29, 2025

2:00 pm – 4:00 pm	Optional Welcome Activities: Guided Beach Hiking Excursion or Beach Instructor-Led Meditation
3:30 pm – 4:00 pm	First-Timer 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

8:00 am – 8:30 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
10:30 am – 11:15 am	Session 2: CEO Reactions: Industry Leaders on Today's Trends
11:30 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: 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

8:00 am – 8:30 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
9:45 am – 10:20 am	Session 8: Succession by Design: CEO Transition Strategies
10:30 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: Elevating Your Firm’s Board Partnership 10C: Practical Applications of AI
12:20 pm – 1:00 pm	Lunch & Session 11: The US Administration’s Impact on AEC Industry
1:15 pm – 5:00 pm	Lunch & Free Time to Enjoy Optional Activities & Golf