



The CFMA, KyCPA and AGC of Kentucky proudly presents the

Ohio Valley Construction Conference

Sept. 22 and 23

Horseshoe Southern Indiana

13 hours of CPE



Kentuckiana chapter
Tri-State Indiana chapter
Bluegrass chapter
Central Indiana chapter
Middle Tennessee chapter



General Information

Ohio Valley Construction Conference

Sept. 22 and 23 - 13 hours of CPE - Horseshoe Southern Indiana, Bossier City Room

Member discount fee: \$250

(for CFMA, KyCPA and AGC members)

Non Member fee: \$275

We are excited to announce the inaugural Ohio Valley Construction conference organized by CFMA, KyCPA and AGC of KY!

Early discount: Registrants may reduce registration fees by \$25 if payment and forms are received more than (30) days prior to the conference date.

Group discount: This discount is available to CFMA, AGC and KyCPA members and their staff. (Register 6 or more attendees from the same company and save \$25 per registrant). Please submit all group registrations at the same time with payment. This discount is not available online.

Cancellation: Cancellations received after **Sept. 16** will be subject to an administration fee of \$25. Cancellations after **Sept. 20** and no shows will receive NO REFUND.

Lodging: Rooms are being held at the Horseshoe Southern Indiana; Elizabeth In. Registrants must indicate their attendance at the CFMA/KyCPA conference to receive the special room rate of \$87. To make reservations, call the hotel at 866.766.2671. Please make your reservations by **Sept. 7**. (Sleeping room cancellation fees and policies are subject to hotel rules and may differ from conference registration cancellations.)

Schedule

Thursday, Sept. 22 (6 hours of CPE)

9:30 – 10:00 Registration

10:00 – 10:10 Welcome and Announcements

Jeff Nuttall, Kentuckiana chapter of CFMA, Abel Construction Co., Louisville

10:10 – 12:00 Key Performance Indicators that Drive Best Practices

This dynamic session presented by FMI, one of the leading consulting firms to the construction industry, will allow participants to gain a better understanding of linkage between financial and operations management. **Michael Clancy**, FMI Corporation, Raleigh, N.C.

12:00 – 1:00 Lunch

1:00 – 1:50 Succession Planning Issues and Valuation Considerations

This session will help construction financial managers (CFMs) and their advisors identify their role in the succession planning process, understand various succession options and enhance

their knowledge of how company valuation is determined and affected by various decisions.

Randy Schulz, CPA, Harding, Shymanski & Company, PSC, Evansville, Ind.

1:50 – 2:00

Break

2:00 – 2:50

Economic Update

Hear the latest information on economic trends impacting demand for new construction projects and how these trends may have a direct impact on your business. We are pleased to have Ken Simonson, the leading voice for the construction industry on economic topics, to present this session.

Ken Simonson, Associated General Contractors of America, Arlington, Va.

2:50 – 3:20

Networking and refreshment break

3:20 – 4:10

Surety Panel

This panel of surety industry experts will address the prevailing trends impacting bonding within the construction industry. Participants who complete this session will benefit from a current update of the status of the surety industry as well as have an increased understanding of the future direction of the surety industry. Participants will also gain valuable ideas for maintaining/expanding bonding credit lines.

Todd Loehnert, Wells Fargo Insurance Services USA, Inc. Louisville

Larry LeClaire, NASBP, Washington, D.C.

Dave Walla, Aetna/Travelers Bond, Cincinnati, Ohio.

4:10 – 5:00

Risk Management Panel

Our panel of insurance risk management experts will address recent developments in property & casualty programs within the construction industry. Participants who complete this session will leave with valuable ideas for improving risk management within their organization as well as benefit from ideas for controlling claims and premium costs.

Chris Sweeny, Phyllis Milliner, and Jerry Heming, Van Meter Insurance Group, Bowling Green

5:00 – 5:10

Concluding Remarks

Mark Schaeffer, CPA, CCIFP, OVC Conference Chair, Bowden Wood CPAs, Louisville

Stuart Binstock, CFMA National, Princeton, N.J.

5:30– 6:30

Networking Reception

Friday, Sept. 23 (7 hours of CPE)

7:30 – 8:00

Registration/Continental Breakfast

8:00 – 8:05

Welcome and Opening Remarks

Paul Esche, CFMA Tri-State, Harding, Shymanski and Company, PSC, Evansville Ind.

8:05 – 9:20

CFO Panel

Moderator-led discussion to share and exchange best practices related to project management involvement, interaction of CFO with operations, financial reporting and related topics.

Jeff Nuttall, Moderator, Kentuckiana chapter of CFMA, Abel Construction Co., Louisville

Sean Barnett, Spohn Associates, Inc, Indianapolis, Ind.

Scott Parker, Gray Construction, Lexington

Dennis Perrey, Energy Systems Group, Newburgh, Ind.

9:20 – 10:10

Social Media – Marketing Benefits and HR Risk Issues

This session will help CFMs and their advisors understand how social media can be a tremendous tool for marketing your business and keeping up with the emerging trends in the marketplace, but also can present new and unique risks from a human resource perspective.

Matt DeVries, Stites & Harbison, Nashville, Tenn.

10:10 – 10:20 **Break**

10:20 – 11:10 **FASB Update**

This update will address the various FASB projects underway which are impacting the construction industry and participants will learn what they need to be doing now to prepare for these impending changes. Topics will include revenue recognition, lease accounting, multiemployer pension plans disclosures and contingencies. We will also discuss the status of private company financial reporting initiatives.

Jerry Henderson, CPA, CCIFP, BKD, Louisville

11:10 – 12:00 **Tax Update**

This tax update will help CFMs and their advisors understand recent changes in tax laws, including court cases, PLRs, and similar interpretations affecting the construction industry.

Doug Dean, CPA, Dean Dorton Allen Ford, Lexington

12:00 – 1:00 **Lunch**

1:00 – 1:50 **Lien Laws: Tips & Pitfalls for the Four State Area – Ky., Ind., Ohio & Tenn.**

This session will equip CFMs and their advisors with an improved understanding of pitfalls related to lien laws and bond rights in these states, and will also offer planning tips for improved lien release management.

Mike Shull, Terry Brookie, Chris Dutton and Tim Crenshaw from Frost Brown Todd's, Louisville, Indianapolis, Cincinnati and Nashville offices.

1:50 – 2:00 **Break**

2:00 – 2:50

Technology Trends in Construction Management

This presentation will provide a brief overview of current technology trends impacting the construction industry and recommendations when considering solutions. Topics will include: bridging the gap between estimating, job cost management and budgeting, Establishing enterprise-wide communication and collaboration, and establishing a business continuity plan.

William J. Craig CPA, Computer Guidance, Scottsdale, Ariz.

2:50 – 3:15

What Every CFO should Know about Fraud Risks

This session will address the fraud risks that are frequently found in the construction industry and will help contractors identify the steps they can take to help reduce these risks.

Drew Chambers, CPA, CFE, Mountjoy Chilton Medley, PLLC, Louisville

3:15 – 3:30

Concluding remarks and reminders

Jim Phillips, CFMA Central Indiana Chapter, Old National Insurance, Indianapolis, Ind.

Speakers and Panelists

Sean Barnett, has 20 years of experience in the construction and architectural industry. He is responsible for the administration and financial functions of the daily operations of the office for Spohn Associates.

Terrence L. Brookie, member of the law firm of Frost Brown Todd LLC. He concentrates in the areas of construction and surety law. Brookie is also a mediator of construction disputes.

Drew Chambers, CPA, CFE, Mountjoy Chilton Medley, his areas of industry concentration include electric cooperatives, manufacturing, distribution and retail operations.

Michael Clancy, is a consultant with FMI, management consultants and investment bankers for the construction industry. Clancy assists his clients in areas of corporate strategy, project execution and business development.

William J. Craig, CPA, director of sales and business development, Computer Guidance Corporation. Craig brings extensive software sales, public and private accounting, job cost and project management experience.

J. Timothy Crenshaw, counsel to Frost Brown Todd, LLC, and focuses his practice on construction law and litigation / alternative dispute resolution.

Doug Dean, CPA, director of tax services, Dean Dorton Allen Ford, PLLC. Dean has experience in providing tax, estate planning, merger and acquisition, and business valuation services.

Matt DeVries, Stites & Harbison, focuses primarily on construction and business litigation. DeVries represents contractors, subcontractors, design-builders, owners, developers and design professionals.

Christopher J. Dutton, is a senior associate at Frost Brown Todd LLC. Dutton practices in the litigation department and is a primary member of FBT's Construction Law Group.

Jerry Heming, Van Meter Insurance Agency, interacts with all offices to further develop relationships with existing carriers as well as developing new market opportunities. Heming serves on the board of directors of VMI.

Jerry Henderson, CPA CCIFP, BKD, is the firm-wide leader of BKD National Construction & Real Estate Group. Henderson provides technical input on matters unique to the construction and real estate industry.

Larry LeClaire, director of government affairs for NASBP, Washington, DC, has advocated policy interests on behalf of trade and professional associations.

Todd Loehnert, senior vice president and bond manager at Wells Fargo Insurance Services of Ky., Inc. Loehnert has 25 years of experience in the industry.

Phyllis Milliner, claims manager for Van Meter Insurance Agency, which has been actively involved in mitigating over \$323 million in client claims over the past five years.

Scott Parker, CPA, VP, heads up all finance accounting, risk management, information technology and project financing activities for Gray Construction.

Dennis Perry, vice president/ chief accounting officer for Energy Systems Group. He is responsible for the day-to-day management of the accounting, information technology and measurement & verification functions.

C. Michael Shull, III, Frost Brown Todd LLC, focuses his practice on construction law and litigation. He has experience with claims involving delay costs, differing site conditions, defective plans and specifications, change order disputes and more.

Randy Schulz, CPA, is vice president in client services at Harding, Shymanski & Company, PSC. Schulz serves as one of the firm's lead construction/contractor industry specialists.

Kenneth D. Simonson, chief economist for the Associated General Contractors of America. He provides insight into the economy and what it implies for construction and related industries through frequent media interviews, presentations and *The Data DIGest*.

Chris Sweeney, Van Meter Insurance has experience in the large property & casualty insurance arena. He represents both domestic and international clients.

Dave Walla, account executive officer with Aetna/Travelers Bond of Cincinnati. He is a member of the CFMA Cincinnati chapter.



**Kentucky Society
Certified Public Accountants**

1735 Alliant Avenue
Louisville, KY 40299-6326

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Registration Form

Please use photocopies of this form for additional registrations.

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Name _____ Firm/Company _____

Address _____ City/State/Zip _____

Phone _____ Fax _____ Email _____

___ *Special Needs: Please check here if you are disabled or require special services. Attach a written description of needs.*

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- KyCPA Member
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Payment options - Check or Credit Card

Total Amount \$ _____ ___ Company ___ Personal

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Please return to: KyCPA, 1735 Alliant Avenue, Louisville, KY 40299-6326 Phone: 502.266.5272 / 800.292.1754 (in KY) FAX: 502.261.9512

Register online at kycpa.org.

The Certified Construction Industry Financial Professional test will be administered on the Wednesday afternoon Sept. 21 at Horseshoe Casino. Contact Sarah Bettison at 609.945.2400 for more information or to register. www.iccifp.org

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