

AGC CONSTRUCTION FINANCE SUMMIT

STRATEGIES. INSIGHTS. RESULTS

 SALT LAKE CITY  OCTOBER 27

SALT LAKE CITY AGENDA

7:30 AM	Registration Opens			
8:00 AM	Breakfast			
8:20 AM - 9:20 AM	Morning Keynote Steve Carlow, Utah State Tax Commission Sales Tax in the Construction Industry			
	OPTION ONE	OPTION TWO	OPTION THREE	OPTION FOUR
9:30 AM - 10:20 AM	Jeremy McAdams (Aldrich Advisors) Cash Flow Under Pressure: Managing Risk, Liquidity, and Profitability in Construction	Cameron Colligan (Leavitt Insurance & Central Bonds) Construction Bonding: What Contractors Need to Know to Protect Capacity, Cash Flow, and Growth	Jason Knight (CUI) 45-Minutes to Clarity: 2026 Healthcare Trends	Whitney L. Charles (Edward Jones) The \$20M Contractor That Wasn't Sellable: A Real Exit That Almost Fell Apart
10:30 AM - 11:20 AM	Jeremy McAdams (Aldrich Advisors) Construction KPIs That Matter: Financial Metrics That Predict Performance and Risk	Derk Kapp (Corporate Capital Inc.) From Liability to Legacy: Smart Asset Protections for the Construction Business	Matt Gollihur (Zurich North America) Surety Bonds 101	Michael Sayre (CUI Wealth Management) Three Retirement Plan Moves That Cut Costs, Win Bids, and Build Owner Wealth
11:30 AM	Lunch			
11:45 AM - 12:35 PM	Afternoon Keynote Jeff Walker (CLA) A Contractor's Guide to Financial Statements: Balancing Banking, Bonding, and Tax Strategy			
12:45 PM - 1:35 PM	Mikalyn Paulson (Integrated Companies) Building Incentive Programs That Increase Your Bottom Line	Jyll Waters (VANCON INC) Field-Driven Project Controls & KPIs That Work	Andrew Wan (Larson & Company) Captive Insurance Strategies for Construction Companies	Brian Bevan (CLA) "Twealth" Tax and Wealth Advisory – Better Together
1:45 PM - 2:35 PM	Bill Hartnett (Contractors and Developers Bonding) Surety, Establishing and Growing Your Surety Program	Joshua Irvine (Irvine Legal) Keeping Your Money in Your Pockets: Collections, Taxes, Systems, and More	Steve Avis (Haynie) Building Better Margins: A Panel Discussion on Monthly Job Costing	Porter Madsen (Highcountry Wealth Management) Highcountry Horizons: Business Continuity and Estate Tax Mitigation



EXPERT
INSIGHTS



ACTIONABLE
STRATEGIES



INDUSTRY
LEADERS



REAL-WORLD
SOLUTIONS



ASSOCIATED GENERAL
CONTRACTORS OF UTAH
"The Construction Association"