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CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS ADVISORS



EVOLVE 2024

Annual Construction Summit

Huntsville

Evolve Construction Summit Agenda

September 12, 2024

- | | |
|----------------------------|--|
| 8:00 am – 8:40 am | Check-In, Breakfast, Networking |
| 8:40 am – 8:45 am | Opening Remarks – LeAnne Goode & Kami Minor – Anglin Reichmann Armstrong |
| 8:45 am – 9:45 am | Keynote Speaker – Michael Bellaman , President & CEO – Associated Builders and Contractors |
| 9:45 am – 10:10 am | Networking Break |
| 10:10 am – 11:10 am | Owner Panel
Panelists:
Rusty Blackwell , Partner – Halliburton Surveying & Mapping
Pam Johnson , Vice President – Quality Glass Company, Inc.
Will Mitchell , President and Owner – Stewart Electric Company, Inc.
Kerrick Whisenant , President – Limestone Building Group |
| 11:10 am – 12:10 pm | Lunch & Networking |
| 12:10 pm – 12:15 pm | New Service Line Introduction
Alissa Phelps , Director of HR Consulting Services
Anglin Reichmann Armstrong |
| 12:15 pm – 1:00 pm | A Guide to Captive Insurance – How contractors can take control of their insurance costs
Speakers:
Steve Norton , Executive Vice President, Chairman – Captive Risk Practice, Marsh McLennan Agency
JD Seymour , Vice President, Captive Risk Practice – Marsh McLennan Agency
Johnny Van Osborne , Senior Vice President – Marsh McLennan Agency |
| 1:00 pm – 2:00 pm | Federal Cybersecurity Regulations and Their Impact for Business Owners
Daniel Akridge , Director of Engagement – Summit 7 Systems |
| 2:00 pm – 2:30 pm | Networking Break |
| 2:30 pm – 3:30 pm | Succession Planning
Gary Anglin , Partner – Anglin Reichmann Armstrong |
| 3:30 pm – 4:30 pm | Mobilizing (not Motivating) Your Team
Keynote Speaker – Vincent E. Boles , Major General (Retired) |
| 4:30 pm | Closing Remarks – LeAnne Goode & Kami Minor – Anglin Reichmann Armstrong |
| 4:30 pm – 6:00 pm | Happy Hour, Hosted by Anglin Reichmann Armstrong |

Our Speakers



Michael D. Bellaman

President and CEO - Associated Builders and Contractors

Keynote Speaker

Michael D. Bellaman has served as president and chief executive officer of Associated Builders and Contractors, a national trade association representing more than 23,000 members from 67 Chapters across the United States, since 2011. In his role, Bellaman leverages the Merit Shop philosophy to help members develop people, win work and deliver that work safely, ethically and profitably for the betterment of the communities in which they work. He leads the association to deliver on the following long-term strategic goals:

- ▶ Establish ABC members as the industry-leading standard for total human health, safety and environment;
- ▶ Increase the political influence of ABC;
- ▶ Be the leading force for workforce development and education; and
- ▶ Continuously grow older and deliver value to a diverse and committed membership.

Under his leadership, ABC has deployed a five-year, association wide strategic planning framework to align all chapters and members which, over the last decade, has led to results including: growing contractor membership by 7%, increasing the number of fair and open competition states by 1,100% and the number of right-to-work states by 22%, and expanding Free Enterprise Alliance fundraising by 200%.

Bellaman has launched initiatives that have strengthened ABC members' value proposition, such as a construction technology and innovation initiative, a grassroots political advocacy app, growing national recognition for the National Craft Championships and Construction Management Competition and deploying an inclusion, diversity and merit strategy.

Bellaman is dedicated to helping ABC members and the entire construction industry achieve industry-leading safety. He is a co-founder of the Construction Coalition for a Drug and Alcohol-Free Workplace and has championed a roadmap for companies whose leaders want to transform their safety programs through ABC's STEP Safety Management System.

A 1985 graduate of Pennsylvania State University, Bellaman earned a bachelor's in architectural engineering and spent more than two decades in the construction industry before joining ABC.

Our Speakers



Tiffany Brightwell
President - ABC North Alabama
Owner Panel Moderator

Tiffany Brightwell joined the ABC North Alabama Chapter as President in 2013. In her role at ABC, she oversees the Chapter's daily operations. ABC is a nationwide construction association built on the Merit Shop philosophy, helping members develop talent, win work, and deliver that work safely, ethically and profitably. The North Alabama Chapter serves over 200 member companies in Huntsville and surrounding areas. Tiffany is a 2005 graduate of the University of South Alabama and received her IOM designation in 2014. She and her husband live in Priceville with their two children.



Rusty Blackwell
Partner - Halliburton Surveying & Mapping
Speaker (Owner Panel)

Mr. Blackwell has over 20 years of experience in the field of land surveying. He holds a Bachelor of Science degree in Geomatics from Troy University and is a licensed Professional Land Surveyor in Alabama, Mississippi, and Tennessee. Currently, Mr. Blackwell serves as the Chair of the Surveying and Geomatics Sciences Program Advisory Board at Troy University, is a member of the Board of Directors for the Associated Builders and Contractors North Alabama Chapter and is serving a 3-year term on the Alabama Underground Damage Prevention Authority. He was the 2018-2019 President of the Alabama Society of Professional Land Surveyors and served for 3 years on their Executive Board. Mr. Blackwell is a partner at Halliburton Surveying & Mapping, Inc. and will soon assume the role of Chief Operating Officer.



Pamela A Johnson
Vice President (2013 – Present) - Quality Glass Company, Inc.
President (2016 – Present) - Johnson Waterproofing Company, Inc.
Speaker (Owner Panel)

Background: I am a proud native of Huntsville, Alabama. I graduated from Grissom High School and immediately continued my education at the University of South Alabama where I earned a bachelor's degree in Communications with an emphasis in Public Relations.

Career: As Vice President of Quality Glass Company, I am responsible for completing contractor pay applications, invoicing, managing accounts payable and accounts receivable, overseeing human resources and employee benefits, and maintaining commercial lines of insurance. In addition to my role at Quality Glass Company, I proudly serve as President of Johnson Waterproofing Company where many of my responsibilities mirror those at Quality Glass. The objective for my work at Quality Glass Company is consistent with my objective for Johnson Waterproofing Company, to operate as efficiently as possible while maintaining the highest standard of workmanship and product quality to consistently meet and exceed the needs of our customers.

Personal Interests: Outside of my work commitments, I serve on the Leadership Board for the Associated Builders and Contractors and involve myself with several local clubs & organizations throughout Huntsville. In my free time I enjoy walking my dogs, Alabama football, traveling, and spending time with family and friends.

Our Speakers



Will Mitchell

President and Owner – Stewart Electric Company, Inc.

Speaker (Owner Panel)

Will is the President and Owner of Stewart Electric Company with over 25 years of experience. After having attended UAH, Will rose through the ranks at Stewart Electric from the field to estimating and project management and, ultimately, to President/ Owner and is exceptionally qualified in all aspects of electrical construction. As the President and Owner, Will is always on the threshold of innovation and has pushed the boundaries of what can be accomplished in electrical contracting and construction. He continues to lead and cultivate exceptional project teams, propelling Stewart Electric to build an outstanding reputation one project at a time by ensuring that each job is done right and on time.

As Chairman of the North Alabama Craft Training Foundation (NACTF), Will was honored for his devotion and distinguished service demonstrating his commitment to ensuring a quality workforce throughout the generations. He continues to serve as a member of NACTF's Board of Directors. In addition, Will has propelled the company to higher achievements in safety, earning Stewart Electric the 2024 Platinum and 2023 Bronze Awards from the Associated Builders and Contractors (ABC) association for the development of quality safety programs.

Will believes strongly in giving back to the community and has sponsored and supported various community sports and recreation teams throughout the years. He continues to encourage men and women to enter the field of electrical work by providing opportunities for them through the NACTF Apprenticeship Program. His extraordinary managerial style, commitment to people, and dedication to the trade have earned him deep respect in his company, community and in the industry.



Kerrick Whisenant

President - Limestone Building Group

Speaker (Owner Panel)

Since 1998, Kerrick Whisenant has served in the construction industry as an estimator, project manager, contract manager, project executive, preconstruction director, and general manager. He has been responsible for construction projects from proposal to punch list. Kerrick has extensive education and experience and specializes in construction processes, contracts, cost controls, scheduling, and construction information technology. He leads every project with the goal to deliver the highest value to the customer with least impact to their daily processes. Throughout his career he has participated in many design build proposals and projects. He has worked with design teams on constructability, selection of systems, and proposals. The construction for these proposals, once won, has been performed under his supervision.

Achievements, Special Recognition and Honors: Associated Builders and Contractors of North Alabama - 2020 Chair-Elect, National Board. Member American Subcontractors Association - 2011-2012 National President, 2010-2011 National Vice President, 2009-2010 National Treasurer, 2008-2009 National Secretary, National Board of Directors 2006-Present, Executive Committee 2007-Present, Task Force on Ethics in Construction. American Subcontractors Association of Alabama - State Board of Directors 2006-Present, President's Positive Impact Award 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011. Sigma Lambda Chi - Nation Honor Society for Construction - Auburn University Chapter President, 1998-1999.

Our Speakers



Alissa Phelps, SHRM-CP

**Director of HR Consulting Services - Anglin Reichmann Armstrong
Speaker**

Alissa Phelps is the Director of HR Consulting Services, bringing nearly two decades of expertise in corporate processes & compliance for government contractors. She leads the firm's HR Consulting Services department with a wealth of practical experience and in-depth knowledge.

Alissa earned her Bachelor of Science in Liberal Studies with a concentration in Political Science from Athens State University. Prior to joining Anglin, she founded and managed AR Business Consulting in Huntsville, AL. She is a SHRM-Certified Professional and a QuickBooks® ProAdvisor. Alissa is also an active member of the Society for Human Resource Management (SHRM) and the North Alabama Society for Human Resource Management (NASHRM).



Steve Norton

**Executive Vice President, Chairman, MMA Captive Risk Practice -
Marsh McLennan Agency
Speaker**

Steve joined J. Smith Lanier & Co. (JSL) in 2003 to establish the firm's Alternative Risk Financing and Captive Insurance Company practice after spending nearly 10 years with PricewaterhouseCoopers LLP (PwC) where he led their Insurance & Risk Management Consulting Practice in London and Atlanta. In February, 2017, JSL merged with Marsh McLennan Agency, LLC (MMA) and Steve was named Chairman of the MMA Captive Risk Practice in August, 2017.

While at PwC Steve worked with many Fortune 1,000 companies to design and develop their insurance and risk management programs which, in many cases, included captive insurance companies. Some of the captives Steve established or re-purposed while at PwC include those for Home Depot, Sprint, Tootsie Roll, Nabors Industries, Siemens, Cardinal Health, Securitas and Regis Corporation.

Since joining JSL Steve has established numerous captives and reinsurance trusts for clients. He serves as a non-voting advisor to six captive boards, is JSL's director on the board of Valley Indemnity, JSL's sponsored group captive; and was secretary and director on the board of JSL's segregated portfolio company reinsurer, Southeastern Casualty, prior to the merger with MMA.

He also works with MMA clients to establish 831(b) qualifying captives to cover difficult to place risks. These captives, when properly structured, can provide significant risk financing and tax benefits to the owners. Steve has established or re-purposed nearly 100 captive insurance companies during his career in domiciles such as Cayman, Bermuda, Ireland, Vermont, Arizona, Hawaii, Guernsey, Isle of Man, South Carolina, Alabama, Tennessee and Delaware.

Prior to PwC, Steve worked as an insurance broker for Aon and one of its predecessor companies and as a risk manager for a major diversified energy company.

Steve graduated from The University of Georgia's Risk Management program with a BBA in Risk Management & Insurance and did graduate work at Georgia State University. He has obtained his Chartered Property Casualty Underwriter and Associate in Risk Management designations from the Institutes and while he was in London was a Member of the Institutes of Risk Management in the United Kingdom.

He has also been a speaker on risk management and captives at a number of industry and educational events including: the national RIMS conferences in New Orleans and San Francisco, the Atlanta and New York City RIMS chapters, the Insurance Managers Conference of Cayman, and the Bermuda Reinsurance Congress. He has also been a guest lecturer for the University of Georgia and Georgia State University graduate level classes.

Our Speakers



JD Seymour

Vice President, Captive Risk Practice - Marsh McLennan Agency

Speaker

JD Seymour is the Director of Alternative Risk Programs at Marsh McLennan Agency (MMA). As Director, JD oversees the alternative risk financing and strategic programs for the organization by leveraging his extensive industry knowledge and developing personalized programs for his clients and prospective clients. JD's industry experience lies heavily with single parent captives, protected cell companies, group captives, medical stop-loss, and loss-portfolio transfers.

Prior to joining MMA, JD was an Account Executive of Business Development for a global captive management firm.



Johnny Van Osborne

Senior Vice President - Marsh McLennan Agency

Speaker

Johnny is a Senior Vice President and risk management consultant with Marsh & McLennan Agency. He joined the first in 2014. He partners with organizations to evaluate both existing and potential risk exposures and helps them establish the appropriate policies and procedures to transfer, mitigate, and minimize those said risks. Johnny leads the overall relationship management, program placement and service model for his team. His experience lies heavily on large, complex risks with both domestic and international exposures. His main focus is working with Construction, Manufacturing and Technology risks.



Daniel Akridge

Director of Engagement - Summit 7 Systems

Speaker

Daniel Akridge is the Director of Engagement at Summit 7. In this role he assists DoD Contractors in achieving DFARS 7012, CMMC, and ITAR Compliance by leveraging the Microsoft Government Cloud. Prior to this role he was brought to Summit 7 to build and launch a DFARS 7012 Compliant MSP offering.

Before joining Summit 7, Daniel worked at Managed Service Providers and the Army Material Command supporting a wide variety of regulations and compliance frameworks HIPPA, PCI, NIST 800-53, and NIST CSF. If that wasn't enough fun, he also taught IT certification courses during the 2008/2009 recession for people looking for a career change.

Bonus Round: If you've made it this far, he was also a fire safety clown (Pinwheel) for the American Red Cross when he was 10 years old. This is just for those that stuck around to read the bio.

Our Speakers



Gary Anglin, CPA, CGMA

**Partner and Chairman of the Board - Anglin Reichmann Armstrong
Speaker**

Gary Anglin is a Partner and Chairman of the Board, leading the firm's executive management team. He is a graduate of the University of Alabama, where he earned his Bachelor of Science degree in accounting. Gary has over 30 years of experience in public accounting, providing strategic business and tax planning, merger and acquisition advisory services, government contractor consulting services, estate planning for business owners, executive management, and planning services to high net worth individuals. His industry focus includes information technology, government contracting, biotechnology, professional services, real estate, and hospitality. Gary serves on the board of directors and the executive committee of Cyber Huntsville, which promotes the advancement of cyber and technology in the Tennessee Valley. He is also chair of the Ethics Committee for the Alabama Society of Certified Public Accountants. Gary's careful analysis and pleasant manner give clients a high level of comfort and trust for their complex transactions and pivotal decisions.



Vincent Boles

**Major General (Retired)
Keynote Speaker**

Vincent Boles was commissioned from the ARMY ROTC program at Niagara University as a Distinguished Military Graduate in 1976. He has served in a variety of assignments over a 33-year career, to include Command at every possible level and a number of combat deployments.

His final Army assignment was as the Assistant Deputy Chief of Staff, G4 on the Army Staff in the Pentagon, where he oversaw Logistics Operations and Readiness for the 1.1 million Soldier force to include the surges into Iraq and Afghanistan.

Retiring in 2009 to Madison, Alabama, he established Vincent E. Boles, Inc., a leadership and logistics consulting practice, speaking and working with corporate and association groups around the nation and overseas on the subject of Leaders and their team's "Best Getting Better." His audiences have included: Deloitte; Fidelity; USAA; Ernst and Young; AIG; The United States Secret Service; The Boy Scouts of America and The American College.

He is the author of "4-3-2-1 Leadership... What America's Sons and Daughters Taught Me on the Road from 2d Lieutenant to 2-Star General" Now in its 3rd printing a recent review of the book commented: "He didn't write this book exclusively for the military audience and he does us all a great service by putting these leadership lessons into one volume and sharing them."

In 2011 he was inducted in the US Army Ordnance Corps and Niagara University ROTC Halls of Fame. He serves as an adjunct professor of Leadership and Logistics at the University of Alabama Huntsville and the Defense Acquisition University - South.

Our Speakers



Kami Minor

Director of Marketing & Communications - Anglin Reichmann Armstrong
Event Manager

Kami joined Anglin Reichmann Armstrong in May of 2019. Kami has her Bachelor of Science degree in Public Relations and Speech Communications from the University of Central Arkansas. She has experience in public relations, marketing, administration, management and team leadership training. Before joining Anglin, Kami worked as a website administrator and communications manager for a faith-based not-for-profit and as a national account executive for a global telecommunications company.

Kami manages firm-wide communications, marketing, and Anglin's business development initiatives. She is a member of the Association for Accounting Marketing (AAM). Kami earned her Digital Marketing Fundamentals Certificate from Association for Accounting Marketing in 2023.

Kami is an active volunteer within the Madison City School District. In addition, she dedicates her time to the Women's Economic Development Council Foundation (WEDCF), where she serves as a Mentor. She also dedicates her time to the Madison City Chamber of Commerce, where she serves as a Madison City Chamber Ambassador. Furthermore, she plays a crucial role on a local Homeowners Association (HOA) board, holding the position of Architectural Approval Chair.



LeAnne Goode, CPA, MBA

Partner, Audit & Assurance Services - Anglin Reichmann Armstrong
Event Team

LeAnne Goode is a Partner in the Audit and Assurance Department. She earned her Master of Business Administration-Accounting from the University of North Alabama in 2016. LeAnne also attended the University of North Alabama for her undergraduate, graduating magna cum laude with a Bachelor of Business Administration in 2013. She is experienced in public accounting, assisting with audit and accounting services. LeAnne supports her clients with reviewed and audited financial statements and employee benefit plans. She has a great deal of experience working with clients of various sizes in the manufacturing, not-for-profit, construction, and government contracting industries. LeAnne is an active member of Phi Mu Fraternity Alumnae and the University of Northern Alabama Alumnae Association. She is a member of ABC of North Alabama and serves on their membership committee and is a member of their Future Leader's Exchange program.

LeAnne's proactive approach with clients and staff ensures they are prepared for the future and have the resources or knowledge to be more efficient moving forward.

Our Speakers



Luke Kinzer, CPA, CFE, CGMA

**Partner, Audit & Assurance Services - Anglin Reichmann Armstrong
Event Team**

Luke Kinzer is a Partner in the Audit and Assurance Department at Anglin Reichmann Armstrong with over ten years of experience in public accounting. Luke earned his Master of Business Administration from the University of Alabama in Huntsville in 2015. He also attended Auburn University for his undergraduate where he earned his Bachelor of Science in Accounting in 2006. Luke supports clients with planning, strategy, auditing, and advisory services regarding Employee Stock Ownership Plans (ESOP), noncash compensation, and business combinations. As Anglin's Employee Benefit Plan Audit Quality Center Representative, Luke is instrumental in the firm's audit and consulting services for retirement plans. Luke also performs peer reviews, agreed-upon procedures, and a supervisory role for the firm's auditing and compliance services. Luke also supports the firm by providing various training opportunities to inform clients and staff of auditing and financial requirements. His industry focus includes biotechnology, government contracting, construction, and employee benefit plans.

Luke serves as Treasurer of the Madison County Volunteer Lawyers Program and is a Past-President of the Huntsville Chapter of the Alabama Society of CPAs. Luke's consultancy services and industry knowledge allow his coworkers and clients to make informed decisions to reach their business goals and enjoy future success.



Stephen Armstrong, CPA

**Partner, Wealth Management - Anglin Reichmann Armstrong
Event Team**

Stephen Armstrong is a Partner at Anglin Reichmann Armstrong with over 25 years of experience in public accounting. He is a graduate of the University of Alabama, where he earned his Bachelor of Science degree in accounting in 1993. Stephen supports Anglin's management and operations by representing the firm as CFO and Treasurer of the Board. In addition to supporting the firm's overall growth and strategy, Stephen focuses on client relationship development to understand clients' needs and how Anglin can proactively help them in the future. Stephen leads the firm's wealth management planning services, supports outsourced CFO services, and supports tax planning services. His advisory services provide clients with a better understanding of their current financial situation to make future business decisions. Stephen's industry focus includes construction, government contracting, and manufacturing.

Stephen serves on the board of the Associated Builders and Contractors of North Alabama, and he is a previous board member of the Land Trust of North Alabama. Stephen's thought leadership and solution-focused mindset positions his clients and the firm for growth and continuous improvement.

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