

**STRENGTH Matters Annual Meeting & Financial Management Conference  
October 15-18, 2018 – Dallas, TX  
BIOGRAPHICAL SKETCHES**

**Winell Belfonte** is a partner in CohnReznick's Affordable Housing and Not-for-Profit and Education Industry practices. She serves as the partner in charge of the Firm's New York office affordable housing practice. In this capacity, she is the lead service provider and business advisor to her clients and accountable for the dissemination and implementation of technical issues for affordable housing and not-for-profit clients.

Winell has 30 years of experience providing services to a broad range of clients. Her extensive experience comes in the areas of audit, accounting, and tax for not-for-profit and for-profit clients including real estate developers, investors, syndicators, contractors, and property managers, as well as charities and foundations. Her business advisory expertise include strategic planning, the design and implementation of internal control structures, financial analysis, budgets, regulatory compliance, and investor requirements.

As a frequent speaker, Winell has become well known for her technical expertise. She has spoken to many not-for-profit and affordable housing audiences and, in 2010, graduated from a nine month community leadership program with Leadership of Greater Washington.

**[Winell.Belfonte@cohnreznick.com](mailto:Winell.Belfonte@cohnreznick.com)**

**Kala Biittner**, CPA is Director of Finance at Portland Housing Center. Portland Housing Center is a nonprofit organization founded in 1991 with support from the City of Portland, some local banks, and concerned citizens. It was founded to ensure all Portland residents had equal access to information and resources to achieve homeownership. We specialize in providing each of our home buyers with education, counseling, financial resources, and other home-buying support.

Kala is a mission-driven CPA that oversees the fiscal planning, budgeting operations of the agency. She also over sees the servicing and management of our residential loan portfolio. Prior to joining Portland Housing Center, Kala managed tax credit financed real estate investments.

**[kalab@portlandhousingcenter.org](mailto:kalab@portlandhousingcenter.org)**

**Jean Bridges** joined EBALDC as Chief Financial Officer in 2015. Jean has more than twenty years' experience in accounting and finance – and has worked in the financial management realm for both non-profit and for-profit entities. Prior to coming to EBALDC, Jean worked with public housing and redevelopment authorities, in a senior management capacity. She led teams to bring agencies to GAAP compliance, overseeing audits, general ledger conversions and reporting, and all aspects of agency financial management and accounting. Jean worked with public housing authorities in California, New York, Virginia, Georgia, Texas, Minnesota, Michigan, and nearly every other U.S. state including Alaska and Hawaii, over a period of eleven years. For five years, Jean also served as Chief Financial Officer of a construction firm doing development and redevelopment work at some of the largest casino resorts in Las Vegas, as well as other commercial and government projects.

Jean holds a Low Income Public Housing Manager designation from the National Association of Housing and Redevelopment Officials (NAHRO). She has a BA and a Masters of Business Administration (MBA) from the University of Nevada Las Vegas.

**[jbridges@ebaldc.org](mailto:jbridges@ebaldc.org)**

**Anjanette Brown**, Chief Financial Officer, joined TRP in June of 2018 and oversees the day-to-day management of TRP Finances, serving as a critical strategic partner with the CEO and COO on all matters. She plays a key role in facilitating financial strategy development by introducing disciplined thought processes and concrete implementation steps in the execution of TRP's strategic plan. Prior to TRP, she was with Neighborhood Housing Services of Chicago (NHS), where she served as the Chief Financial officer. Prior to NHS, she spent 14 years at Community Housing Partners, based in Christiansburg, Virginia, focused on real estate development, housing services, and energy solutions. She held roles of progressive responsibility in Accounting at Community Housing Partners, eventually serving as Assistant Vice President of Accounting. In her role, she managed accounting needs as the organization experienced rapid growth and led a team of 14 staff responsible for the accounting of \$400 million in assets and 115 legal entities. She is a graduate of the Pamplin College of Business at Virginia Tech, where she holds a Bachelor of Science in Accounting.

**[abrown@resurrectionproject.org](mailto:abrown@resurrectionproject.org)**

**Michelle Bush**, MBA, is President/CEO and the chief consultant and founder of Corporate F.A.C.T.S. She leads a team of highly skilled consultants that service a variety of community and economic development clients including community development financial institutions, federal, state and local government, community based organizations, foundations, and other nonprofits across the country. Since establishing Corporate F.A.C.T.S. in the metropolitan Detroit area, the company has compiled an impressive list of clients. She is leading strategies for several Local Initiatives Support Corporation sites.

Corporate F.A.C.T.S. has deep roots in the community development industry working across a broad spectrum of clients and projects. As a HUD technical assistance provider, Corporate F.A.C.T.S. has helped a number of Cities, States and Counties invest federal resources in a variety of community and economic development related initiatives. The firm has led the creation of Quality of Life plans in distressed neighborhoods, developed foreclosure mitigation strategies in several cities and has worked extensively across the country to improve the community development service delivery system. She has worked with numerous CHDOs and CDCs around the country building their capacity to improve neighborhoods.

Prior to starting her own business, Michelle spent nearly twenty years working in high-level local government and non-profit positions. She was the Chief Financial Officer for the Greater Cincinnati Chamber of Commerce, Assistant City Manager and Assistant Budget Director for the city of Cincinnati. While CFO for the Chamber of Commerce, Michelle acted as the CFO for many subsidiary organizations including the Greater Cincinnati/Hamilton County Port Authority, Downtown Development, Inc., the Cincinnati Minority Supplier Development Council and others.

Michelle earned an MBA in Finance from Xavier University in Cincinnati, Ohio.

**[mbush@corporatefacts.net](mailto:mbush@corporatefacts.net)**

**Frank Buss** is a partner in the Dover, Ohio, office of Novogradac & Company LLP, where he performs numerous services related to the new markets tax credit (NMTC), historic rehabilitation tax credit (HTC) and the low-income housing tax credit (LIHTC) industries, including audit and tax services, forecasting and consulting. He has significant experience in tax and audit engagements involving closely held businesses, high-net-worth individuals, community development entities (CDEs), partnerships and nonprofit organizations. Frank joined the firm in 2006 after working as an audit supervisor servicing manufacturing, construction and nonprofit clients for a regional certified public accounting firm in Canton, Ohio. Before that, he served as the chief operating officer for a wealth-management firm, focusing on financial and transaction analysis and a wide range of individual and business planning matters. Frank received a bachelor's degree in business administration from the University of Akron and is licensed in Ohio as a certified public accountant.

**[Frank.buss@novoco.com](mailto:Frank.buss@novoco.com)**

**Greg Callahan**, who has been with CBIZ since 1989, is a consultant and strategist partnering with clients to develop and implement health benefits and wellness programs designed to positively affect the organization's financial profile and its employees' health and well-being. Utilizing a combination of financial analysis, actuarial, benchmarking, creative thinking and open communication, Greg develops a well-defined benefits and wellness plan with measurable outcomes for employers of all sizes and industries. He is unique in that he takes a highly analytic, financial-oriented approach intended to not only maximize the success of the plan, but assist HR teams in reporting to the financial officers while giving financial officers tools to measure the progress for a given strategy. Greg has the experience to strike a careful balance between employee needs and corporate budgets.

In addition to Greg's in-depth analytical skills, he possesses extensive expertise in identifying and implementing custom online enrollment and benefits technology solutions that maximize his clients' administrative and enrollment efficiencies. The breadth and depth of his third-party vendor relationships enable him to implement the right technology for organizations of every size and budget.

Also key to Greg's approach is his focus on communication. He is an expert in developing a communication strategy that is unique and relevant to each company's employees so that they are engaged in the benefits and wellness programs and take action. The ultimate goal is achieving corporate objectives (financial and non-financial) and maximizing employee health and wellness – all while working within the client's budget and culture.

Greg earned a Bachelor of Arts in History from the University of Missouri, an MBA from Rockhurst University and a certification as a Senior Professional in Human Resources (SPHR). Greg is involved in community organizations Foundation, SHRM, SHRM Kansas City and United Way.

**[gcallahan@cbiz.com](mailto:gcallahan@cbiz.com)**

**Agnes Casimir** is Chief Financial Officer at Atlanta Neighborhood Development Partnership, Inc. Agnes has been employed at ANDP since April, 2001. Agnes earned her Bachelor of Arts degree from the University of the Virgin Islands, in St. Thomas, US Virgin Islands. She is also a Certified Public Accountant and a member of the American Institute of Certified Public Accountants. In her role as Chief Financial Officer, Agnes oversees the Accounting Department of ANDP. Agnes brings to ANDP 30 years of accounting experience from both the for-profit and non-profit sector. Prior to joining ANDP, she held various accounting positions while employed with American Express, The Arthritis Foundation and London International. She is a former Board member and Finance chair for The Center for Working Families, and is currently a member of the Finance Council for St. John the Evangelist Catholic Church.

**[acasimir@andpi.org](mailto:acasimir@andpi.org)**

**Allison Clark** is Associate Director, Impact Investments at The John D. and Catherine T. MacArthur Foundation. Allison joined the Foundation in 2006 to oversee investments made through Window of Opportunity, the Foundation's \$150-million affordable rental housing preservation initiative. Since then, her responsibilities have expanded to include overall portfolio management for the Impact Investing program.

Allison has worked in affordable housing, economic development and commercial real estate for over 20 years. Prior to joining the Foundation, she worked as a senior underwriting manager in the Community Lending Group (formerly the American Communities Fund) at Fannie Mae, where she underwrote and closed more than \$150 million in debt and equity transactions for affordable housing developments. She also worked for eight years at Bank One in a variety of departments, including Commercial Real Estate and Community Development Real Estate. Before moving to Chicago, she participated in the Urban Fellows Program in New York City, where she worked as a project manager at the New York City Economic Development Corporation.

Recently, Allison served on Attorney General Lisa Madigan's task force charged with creating and implementing a program to deploy \$100 million in grant funds from a national mortgage settlement aimed at addressing the foreclosure crisis. She also serves on the board of directors of the Chicago Foundation for Women and the Chicago Chess Foundation.

Allison graduated from Harvard-Radcliffe College with a Bachelor's degree in Government, and earned a Master of Management degree from the Kellogg Graduate School of Management at Northwestern University with a concentration in Nonprofit Management and Real Estate.

**[aclark@macfound.org](mailto:aclark@macfound.org)**

Strength Matters Financial Management Conference 2018 – Bios

**David Conway** is a partner in the Dover, Ohio office of Novogradac & Company LLP. Mr. Conway has more than 30 years of experience in the affordable housing industry, specializing in providing accounting, auditing and consulting services for affordable housing owners, developers and syndicators. Before joining the firm in 2005, he was the chief accounting officer for a large syndicator of affordable housing and new markets investments where he had overall responsibility for corporate, tax credit fund, property accounting, tax and financial reporting functions. Mr. Conway previously worked in public accounting for 18 years, during which time his focus was in accounting, audit, tax and consulting in the affordable housing industry, with an emphasis in low-income housing tax credits (LIHTCs) and U.S. Department of Housing and Urban Development (HUD)-regulated properties. He also has extensive accounting and auditing experience in the areas of state and local governments and nonprofit organizations. Mr. Conway holds a bachelor's degree in accounting from Virginia Tech. He is licensed as a certified public accountant in Ohio and Virginia.

**[david.conway@novoco.com](mailto:david.conway@novoco.com)**

**Patrick Cornett** is Executive Vice President and Chief Financial Officer at the Housing Partnership, Inc. The Housing Partnership, Inc. is a nonprofit corporation with a diversified real estate portfolio. The company actively engages in Asset Management, Real Estate Development, Property Acquisitions, and the Sale of Single Family Homes. Additional programs and services are provided to enhance the quality of life for the clients of the company. As Chief Financial Officer, Patrick is responsible for the oversight of finance, accounting, risk management and information technology of the corporation.

Patrick came to The Housing Partnership in 2015 after working several years in public accounting and private industry. He is a CPA with an extensive working knowledge of US GAAP and a history of helping organizations finding accounting and internal control solutions. Patrick has experience with mergers and acquisitions, financial modeling and internal audit. He has also spent several years providing accounting services to organizations within the affordable housing industry and organization subject to compliance with federal regulations.

He is married, and currently resides in Louisville, Kentucky with his family.

**[pcornett@wearehpi.org](mailto:pcornett@wearehpi.org)**

**Jeffrey Crum** is the Chief Investment Officer (CIO) for New Jersey Community Capital (NJCC); New Jersey's largest Community Development Financial Institution (CDFI). NJCC is non-profit organization with nearly \$600 million of capital under management and focuses on neighborhood revitalization and affordable housing creation.

As CIO, Jeff oversees all NJCC's real estate operations, which includes real estate development, asset management, construction management, property management, real estate brokerage services. The real estate group's primary mission involves the acquisition and rehabilitation of abandoned and foreclosed properties to stabilize communities and create quality affordable housing options. The non-profit company also acts as an equity investor and development partner on larger multi-family and commercial projects that create catalytic change in neighborhoods seeking holistic revitalization. Since Jeff joined NJCC in 2011, the organization has completed and sold or leased nearly 600 housing. This real estate activity totals more than \$150 million of investment in primarily low- and moderate-income communities throughout New Jersey and Florida.

Prior to joining CAPC, Jeff worked as Vice President of Real Estate for Build with Purpose, Inc., a non-profit community facilities builder that developed numerous charter school spaces and supportive housing projects. He also spent three years as the Director of Real Estate for New Jersey Community Development Corporation building multifamily supportive housing and community facilities in Paterson, NJ. In aggregate, Jeff has developed nearly \$300 million in community real estate projects that have served thousands low-income individuals and families.

Jeff received a BA in Social Work from Catholic University of America and a Master's Degree in Public Policy from the Edward J. Bloustein School of Public Policy and Urban Planning at Rutgers University. He is a chair of the City of New Brunswick Planning Board and serves on the Board of Directors for the Elizabeth Coalition to House the Homeless. Jeff was recently selected by NJ Biz as a "Forty Under 40" awardee for his accomplishments in the field of real estate.

**[jcrum@njclf.com](mailto:jcrum@njclf.com)**

**Lisa Davis** is an executive director at PGIM Real Estate and Portfolio Manager of Impact Investing. Based in New York City, Lisa is responsible for developing and leading PGIM Real Estate's Impact Investing Strategy, including the creation of a new impact investing fund.

Most recently, Lisa was Director of Investor Relations and Specialty Originations at Pembroke Capital Management, where she raised capital from institutional investors for commercial real estate investment, primarily focusing on affordable housing and community development.

Before joining PGIM Real Estate, Lisa spent six years at the Ford Foundation where she made grant investments in affordable housing and community development, led the foundation's Detroit program, and helped to start Ford's impact investing initiative. Prior to the Ford Foundation, Lisa spent 12 years doing commercial real estate development in Boston, first with non-profit community development corporations such as Codman Square Neighborhood Development Corporation and Asian Community Development Corporation, and then with the private equity firm New Boston Fund. She led the redevelopment of some of the most significant publicly-owned sites in the city, including the former Boston State Hospital site and MTA Turnpike parcels that came available as part of the Big Dig. Lisa started her career in Texas and the Bronx as a community organizer and advocate on housing and homelessness issues.

Lisa has a Bachelors Degree in Liberal Arts from the University of Texas at Austin, and a Master of Science in Real Estate Development and Master of City Planning from the Massachusetts Institute of Technology. She has lived and worked abroad in France, Costa Rica and Japan. Lisa serves on the Board of Directors of the Brooklyn Navy Yard and IMPACCT Brooklyn.

**[lisa.davis@pgim.com](mailto:lisa.davis@pgim.com)**

**Alfredo de la Peña** is Chief Executive Officer of Mission First Housing Group. Alfredo provides leadership to a staff of more than 180 individuals, and reports to the Board of Directors and works collaboratively with Executive and Director-level staff members in each of the respective entities to ensure the organization consistently achieves its mission and financial objectives. Alfredo oversees development and implementation of the strategic plan. His role is to ensure the organization effectively manages growth as a multi-state nonprofit affordable housing developer; assure the organization's financial strength, balancing financial health and stability while advancing the mission; and to build the organization's external identity in order to promote visibility, preserve and expand resources, and connect with other professionals and organizations.

Alfredo was promoted to CEO in July 2016 after serving the organization as Chief Operations Officer for 20 years where he oversaw the management operations for over \$450 million in real estate, as well as managing cash flow for the \$50 million budget.

Prior to joining Mission First in 1996, Alfredo worked as a consultant for the Resolution Trust Corporation where he oversaw the consolidation of troubled assets with a book value of \$5 billion. Prior to that, he developed financial applications for mortgage systems. He also worked for several years in various aspects of residential and commercial real estate, performing financial analysis, budgeting, and cash flow analysis of development projects totaling \$1.4 billion. Alfredo has over 34 years of experience in real estate and finance.

**[adelapena@missionfirsthousing.org](mailto:adelapena@missionfirsthousing.org)**

**Rebecca Donaldson**, Chief Financial Officer, has been with Gulf Coast Housing Partnership (GCHP) since November of 2008. She is responsible for the fiscal management, financial reporting, fiscal compliance, treasury management, legal and loan administration for GCHP and the over 100 companies under GCHP's control or management. Prior to joining GCHP, Rebecca was the principal of a small business consulting practice where she provided accounting, technology and management consulting services to businesses in the greater New Orleans area for eighteen years. She also served five years as the CFO of a mechanical contracting firm where she was the majority owner. Prior to running her own businesses, Rebecca managed the IT Audit Department of First Commerce Corporation and spent several years as a Staff/Senior in the Audit Department of Deloitte & Touche. She is a Certified Public Accountant, a Certified QuickBooks Professional Advisor and a past President of the IT Auditors Association. She holds a Bachelor's of Accounting and is a graduate of Louisiana State University where she was a member of the Baton Rouge chapter of Beta Alpha Psi an international honor organization for accounting, finance and information systems.

**[donaldson@gchp.net](mailto:donaldson@gchp.net)**

**Helen Dunlap** is presently a Housing and Community Economic Consultant specializing in strategic, systems and organizational change work for a myriad of international and domestic owners, developers, lenders and other stakeholders engaged in building, owning and financing affordable housing.

Recent clients include: National and Regional Intermediaries, Local Governments/Partners, National & Regional housing developers, Community Development Financial Institutions, and Foundations & International Investors.

In the past 45 plus years, Helen has run a local housing nonprofit in Napa California, launched the California Housing Partnership, a state of California sponsored entity which is approaching its 30<sup>th</sup> Anniversary as the principle technical assistance facility for affordable housing preservation in California, ran two for profit subsidiaries for Shore Bank Corporation including both an international consulting company working in micro finance internationally and was Deputy Assistant Secretary responsible for FHA multifamily portfolio from 1993-1996 during the first term of the Clinton Administration and President of the National Low Income Housing Coalition from 1996-1998.

Today, Helen specializes in those assignments where a combination of both technical knowledge of the field of housing finance and experience with organizational systems and management are critical to achieving the desired client results. These have included the principle change management for realignment of Mercy Housing in 2006-8, preservation of Greater Miami Neighborhoods portfolio through bankruptcy, successful unwinding of the Neighborhood Housing Services of Silicon Valley organization and reposition of their portfolio on behalf of investors and their Board managing the merger/acquisition of Lakefront Supportive Housing by Mercy Housing, Inc. She has provide support and leadership for a host of housing development entities during the development of their plans including BRIDGE, Inc., TNDC, CPDC, Inc., Urban Edge, Abode Housing and Nevada HAND.

Additionally, she is a Senior Advisor and active in the delivery of commercial market assessments in 80 commercial markets for LISC in Los Angeles, San Diego, Chicago, Richmond, Pittsburgh, the Maricopa Valley (Mesa and Tempe) to illustrate a few. Helen currently serves on the Board of the National Equity Fund.

She is a 5<sup>th</sup> generation Californian, born in the Napa Valley when prune's far outnumbered grapes. She went to the University of California at Santa Barbara, majored in History and African Studies. While retaining a residence in the Napa Valley where she worked and was active in the community following college, she now resides in Chicago working nationally in community and business nonprofit support. She also is the Vice Chair of Board for the Friends of Midway Atoll. Additionally she has both traveled and worked in housing finance in Africa, Eastern Europe, Mongolia and Bangladesh.

**[hdunlap@hdunlapconsulting.com](mailto:hdunlap@hdunlapconsulting.com)**

**David J. Erickson**, is director of Community Development at the Federal Reserve Bank of San Francisco and serves as Community Development Officer for the Federal Reserve's Twelfth District. In this role, he leads the Community Development team toward its mission to advance economic opportunity for lower-income Americans.

David launched and now advises the Federal Reserve journal *Community Development Investment Review* and previously served as research manager for the Center for Community Development Investments, where he fostered initiatives exploring innovative community development financing models and greater intersections with the health, arts, and environmental sectors to identify new investible opportunities that benefit lower-income communities.

David led the collaboration between the Federal Reserve and the Robert Wood Johnson Foundation to bring together the health and community development fields. To date, this partnership has resulted in over 26 conferences around the country and numerous publications, including a cluster of articles in *Health Affairs* in November 2011.

David's book on the history of community development, *The Housing Policy Revolution: Networks and Neighborhoods*, was published in 2009 by the Urban Institute Press. He also co-edited *Investing in What Works for America's Communities: Essays on People, Place, and Purpose* (2012), *What Counts: Harnessing Data for America's Communities* (2014), and *What It's Worth: Strengthening the Financial Future of Families, Communities, and the Nation* (2015). In addition to *Health Affairs*, he has had articles published in *Pediatrics* and the *Journal of Policy History*.

David has a Ph.D. in history from the University of California, Berkeley, with a focus on economic history and public policy. He also holds a master's degree in public policy from Berkeley and an undergraduate degree from Dartmouth College.

**[david.erickson@sf.frb.org](mailto:david.erickson@sf.frb.org)**

**Frances Ferguson** is the acting Vice President, National Real Estate Programs with NeighborWorks® America, guiding the development of national resources for nonprofit rental housing organizations which provide high quality rental homes for over 160,000 households. NeighborWorks offers grant and loan resources; a full suite of asset management resources including portfolio performance benchmarking data, training and consultation; professional development for asset managers and CFOs through CHAM and STRENGTH Matters. NeighborWorks is a federally chartered non-profit corporation, which supports affordable housing and community development across the country, with a focus on its network of 250 affiliated local housing organizations.

Previously, Frances served as the founding executive director of Foundation Communities, pioneering the provision service-enhanced rental housing at scale in the Austin and Dallas-Ft.Worth markets. Currently, her volunteer work includes board service with Affordable Central Texas, working to build The Austin Housing Conservancy fund to preserve existing rental workforce housing in central Texas; HousingWorks Austin, uniting community and business leaders around public policies to support "all kinds of homes in all parts of town"; and Texas Housing Finance Corporation, a nonprofit tax credit syndicator. She has advised Catellus on the affordable housing plan for 711-acre Mueller Airport Redevelopment, where both inclusionary rental and shared equity homeownership have been successfully launched to sustain long term affordability in 25% of the residential stock.

Frances holds her master's degree in business from the University of Texas at Austin, and her bachelor's degree from Oberlin College.

**[fferguson@nw.org](mailto:fferguson@nw.org)**

**Matt Glatting** serves as the Treasurer at Capital Impact Partners, a national community development financial institution that has deployed over \$2.5 billion to finance cooperatives, health care centers, grocery stores, retirement homes, charter schools, and mixed use affordable housing. At Capital Impact, Matt oversees the treasury department and leads the organization's capitalization strategy. Prior to joining Capital Impact, Matt worked in the Finance Department at Calvert Impact Capital and as an investment analyst at Prudential Capital Group. Matt holds a Master of Economics degree from Macquarie University in Sydney and a Bachelor of Arts with double majors in Economics & Political Science from St. Norbert College in Wisconsin. He studied abroad at the London School of Economics in London and at Fudan University in Shanghai.

**[mglatting@capitalimpact.org](mailto:mglatting@capitalimpact.org)**

**Angela Gravely-Smith**, Manager, Real Estate Enterprise Strategies, is a member of the National Real Estate Programs team at NeighborWorks America. Her responsibilities include peer learning, technical assistance, and capital strategies to support sustainable business practices and enterprise level growth. Prior to joining NeighborWorks in 2012, Angela worked at Enterprise Community Partners for 11 years in a variety of positions, including Deputy Director of the Maryland market responsible for grant making strategy and technical assistance support to nonprofit housing developers particularly LIHTC partners and Portfolio Manager for the Enterprise Community Loan Fund with the responsibility for borrower financial analysis, delinquent loan monitoring, and draw requests. Angela is certified by the National Development Council as a housing development finance professional. She holds a master's degree in city planning from Georgia Institute of Technology, a bachelor's degree in mass media arts from Clark Atlanta University, and is pursuing a master's degree in public administration from the University of North Carolina at Chapel Hill.

**[AGravelySmith@nw.org](mailto:AGravelySmith@nw.org)**

**Benjamin K. Greenberg** is the Director of Lending at Housing Partnership Network. Ben is responsible for providing responsive and flexible capital to HPN's member organizations, and to assist in the development of new products and services to meet membership needs. Ben has over 15 years of experience in consultative underwriting and community development lending first at NeighborWorks Capital and then at Community Housing Capital (CHC), both exclusive CDFI's to the NeighborWorks® America network. His last position at CHC was as the Director of Lending where he was responsible for lending services that included such products as enterprise lines of credit, revolving construction and single family rehab lines of credit, interim acquisition development loans and permanent multifamily loans. Under Ben's leadership, CHC originated 352 loans to 131 affordable housing developers totaling \$452 million across 43 states plus the District of Columbia; financed more than 14,700 units of affordable housing with \$1.7 billion in total development costs.

Ben has an accounting degree from Cleveland State University with an emphasis on nonprofit and government accounting as well as a Urban Real Estate Development and Finance Certification from Cleveland State University's Levin College of Urban Studies

**[greenberg@housingpartnership.net](mailto:greenberg@housingpartnership.net)**

**Paul Gunther** is Vice President of Finance at Impact Seven. Paul exercises fiscal oversight of total assets of more than \$107 million, over 50 housing and loan fund subsidiaries, a \$185 million loan portfolio, and an annual budget of \$9 million. Under Paul's leadership, the finance department collaborates with other program areas to provide support in budgeting, financial reporting for decision-making, and feasibility analysis for new projects and expansions. This team is also responsible for compliance with funding source fiscal requirements and financial reporting.

Paul earned his Master of Science in Accounting from San Diego State University. He also holds a Bachelor of Arts in Economics from the University of California-Davis. Paul's professional certifications include: Human Resources Certificate Program, California State University-San Marcos; NeighborWorks America National Training Institute – Financial Management for Decision Makers.

**[paul.gunther@impactseven.org](mailto:paul.gunther@impactseven.org)**

**Matthew Hjelmhaug** is Chief Financial Officer at NeighborWorks® Rochester, Matthew Hjelmhaug leads the way as our Chief Financial Officer. Matthew plays a key role leading the financial team which includes overseeing the finances of the organization, loan servicing, payments, accounting, lending and developing financial reports for the Board of Directors.

**[mhjelmhaug@nwcommunitypartners.org](mailto:mhjelmhaug@nwcommunitypartners.org)**

**Caroline Horton**, Chief Financial Officer at Aeon, is responsible for Aeon's finance and accounting functions. She has expertise in developing management systems that ensure the long-term viability of assets and monitor organizational risk factors. Since 2007, Caroline has been a member of the STRENGTH MATTERS CFO Working Group which has developed a series of white papers on external reporting best practices for the nonprofit affordable housing industry. Caroline earned her BSBA in accounting from Boston University School of Management, and is a CPA (inactive). She was recognized as one of the 2013 Top Women in Finance by Finance & Commerce. She has been with Aeon since 1998.

Aeon is a nonprofit developer, owner and manager of high-quality affordable apartment homes in Minnesota. Aeon's vision is that every person has a home and is interconnected within community. Aeon believes that home is the platform upon which lives are built, and the achievement of home for its residents is Aeon's highest level organizational metric.

The award-winning nonprofit has built or renovated over 4,061 affordable apartments and townhomes, which provide stability to more than 8,000 people each year – including individuals and families with low to moderate incomes and many formerly homeless individuals in supportive housing.

Aeon's inspiration to create long-term community assets is illustrated in its name "Aeon," which means "forever." This long-term approach has led to its award-winning and ground-breaking sustainability work, including LEED Platinum and LEED Gold multifamily developments. Aeon's sustainability has evolved to current efforts to create the most replicable, highly-efficient multifamily housing in the United States, using the Living Building Challenge as its aspirational template.

**[chorton@aeonmn.org](mailto:chorton@aeonmn.org)**

**Ann Houston**, CEO of Opportunity Communities, previously served as Executive Director of The Neighborhood Developers, an organization that builds vibrant and sustainable communities using integrated investment strategies. Over the past decade, TND completed over \$85 million of real estate development, and it engages over 1,600 members annually and, through CONNECT, a partnership of five co-located non-profits, provides financial education and workforce development services to 4,000 clients annually. I served on NeighborWorks America's national Real Estate Advisory Committee and its Community Stabilization Committee on the board of MHIC (a New England CDFI lender and investor), the Massachusetts Association of CDCs, and Massachusetts General Hospital's Executive Committee on Community Health.

**[ahouston@tndinc.org](mailto:ahouston@tndinc.org)**

**Julian Huerta** is the Deputy Executive Director of Foundation Communities, Central Texas' largest nonprofit provider of affordable housing with supportive services. Julian develops and directs education, financial stability, and health programs that serve more than 30,000 working low-income families and homeless adults annually in Austin and North Texas. He brings over 25 years of experience in program development, nonprofit administration and fundraising, the last 20 years with Foundation Communities. Julian is a member of the Board of Directors of RAISE Texas, which promotes innovative asset building initiatives state-wide, and serves on the Advisory Committee for the Humanities Institute at the University of Texas. Julian holds a Bachelor's Degree from the University of the Incarnate Word and a Master's Degree from the University of Texas. He also completed the NeighborWorks Achieving Excellence Program at Harvard University, an 18-month executive education program for leaders in the field of community development.

**[Julian.Huerta@Foundcom.org](mailto:Julian.Huerta@Foundcom.org)**

**Bob Ibanez** is a senior manager in Novogradac's public policy group in Washington, D.C. Bob works with new markets tax credit (NMTC) clients and is part of the NMTC Working Group. He is focused on expanding Novogradac's work with community development financial institutions (CDFIs) around the country. Bob spent 13 years at the CDFI Fund, the final six as program manager of the NMTC and Bank Enterprise Award programs. Before that, Bob had a private consulting practice. He has also worked in the financial and community development industries. Bob has a bachelor's degree from the University of Massachusetts, Amherst, and a master's degree from The American College of Financial Services.

**[Bob.Ibanez@novoco.com](mailto:Bob.Ibanez@novoco.com)**

**Rey Jaquez** graduated from Texas A&M in 1982. He worked in Public Accounting for thirteen years doing audits and tax. In 1995, he joined Affordable Homes of South Texas, Inc. as the Director of Finance. He manages a 50 million mortgage loan portfolio and the Accounting and Finance functions of the company.

**[rjaquez@ahsti.org](mailto:rjaquez@ahsti.org)**

**Brian Kay**, CFO, Community HousingWorks, is a Certified Public Accountant with over 20 years of combined public, private and nonprofit accounting and finance expertise. Brian is responsible for CHW's financial reporting, planning, analysis and risk management. He brings a holistic approach to the CFO role supervising the diverse teams of accounting, human resources, business intelligence and information technology. Brian led the growth CHW's internal real estate acquisition and predevelopment fund to over \$22 million. Before joining CHW in 2012, his career highlights include leadership positions within several diverse San Diego organizations. Brian held the financial responsibility of Anonymizer, Inc.'s sell-side transaction to Abraxas Corporation at a multiple of 16.5x's EBITDA. While at Provide Commerce (formerly Proflowers), he managed growth from start up to over \$100 million annual sales and played a key role in the company's successful initial public offering (IPO). Brian holds a BA in Economics and Business from Westmont College in Santa Barbara, CA.

**[bkay@chworks.org](mailto:bkay@chworks.org)**

**Karen Kent**, CPA is a Certified Public Accountant and a Partner with Kevin P. Martin & Associates, P.C., a CPA and business consulting firm.

With over 25 years of experience, Karen has extensive knowledge of both the affordable housing and not-for-profit industries. She provides a wide array of services to community development corporations, syndicators, real estate developers, management companies, human service provider agencies and other not-for-profit organizations. Karen oversees some of the Firm's largest not-for-profit and affordable housing developer clients. Karen provides accounting and management consulting services, including audits conducted in accordance with Government Auditing Standards, Uniform Guidance, Low Income Housing Tax Credit Program, and HUD and state regulatory requirements. Karen is a member of the American Institute of Certified Public Accountants and the Massachusetts Society of Certified Public Accountants. Karen is a member of the Massachusetts Society of Certified Public Accountants Peer Review Committee and a member of BKR International Assurance Practice Group and Affordable Housing Practice Group.

Karen earned her B.S. in Accountancy from Bridgewater State College graduating Magna Cum Laude.

**[kkent@kpm-us.com](mailto:kkent@kpm-us.com)**

**Daniel C. King**, CPA is a Senior Manager in the National Tax Office of CohnReznick LP. He has over 19 years of experience in public accounting and has been with the firm for 14 years. Dan provides tax compliance and consulting services for clients primarily in the real estate industry. His current practice areas include partnership tax, affordable housing tax credits, historic tax credits; new markets tax credits, commercial real estate and REITs.

**[Daniel.King@CohnReznick.com](mailto:Daniel.King@CohnReznick.com)**

**Vassilis Kontoglis** is a highly-skilled IT professional with proven expertise in: technology needs assessments, systems selection & implementation, IT auditing, special attestation reporting (SSAE 16 and SOC 2), IT risk assessments, business process improvement, change management and cybersecurity. He performs comprehensive and thorough reviews of technology systems and environments, and advises clients on how to use technology to best achieve business goals and objectives. He elicits input from stakeholders at all levels of the organizational hierarchy in order to thoroughly evaluate business performance across functional boundaries. He analyzes current and potential business and IT processes to identify clear opportunities for improvement, which may include streamlining and automation, productivity increases, strategic alignment and cost reductions.

Vassilis has vast knowledge of product lifecycle management processes and operations concentrating in cloud solutions, analytics, mobile technologies, social media platforms, and security. He has proven success in guiding clients and teams to solve technical challenges and provide practical, business-focused advice and solutions. Vassilis provides hands-on and structured training programs, ensuring that processes, controls and technologies are thoroughly and smoothly implemented, and that the lasting benefits of change are achieved.

Prior to AAF, Vassilis worked for Coopers & Lybrand, PricewaterhouseCoopers Consulting, and IBM.

**[vkontoglis@aafcpa.com](mailto:vkontoglis@aafcpa.com)**

**Chrystal Kornegay's** passion for creating projects and programs that result in stronger communities for modest-income working families is evidenced throughout her 20+ years' experience in community development. Chrystal currently serves as the Executive Director of MassHousing. Before joining MassHousing in February 2018, Chrystal served as the Baker-Polito Administration's Undersecretary for Housing and Community Development. Prior to that, Chrystal was Urban Edge's President and Chief Executive Officer and an active member of MACDC. Chrystal brings to state government a deep understanding of affordable housing finance and the nuances of resident-led community development.

Since entering public service, Chrystal has used her experience, expertise and tenacity to advance several important priorities. Since FY 2015, the Baker Administration has increased state capital dollars for affordable housing by almost 18 percent and worked with the legislature to increase rental subsidies for low income families by 42%. Chrystal has worked collaboratively to launch a \$100 million workforce housing initiative; collaborated with partners in state government and the non-profit sector to dramatically reduce the number of homeless families in motels; launched the Community Scale Housing Initiative; partnered with the Mel King Institute to provide leadership training to resident board commissioners serving on local housing authorities; and worked to streamline and grow the Community Investment Tax Credit program.

Chrystal is a graduate of the Achieving Excellence Program at Harvard University's Kennedy School of Government, holds a Master's Degree in City Planning from the Massachusetts Institute of Technology and a Bachelor of Arts from Hunter College.

**[ckornegay@masshousing.com](mailto:ckornegay@masshousing.com)**

**Gayle Harrold Lacroix**, CPA, currently serves as the Chief Financial Officer of Roxbury Tenants of Harvard, a community located on Huntington Avenue in Boston with over 1200 rental units and amenities serving a mixed income community. The agency provides its residents with numerous supportive programs as well as access to a full upscale gym, outdoor pool, playgrounds, day care and after school care. Prior to joining RTH, Gayle was the Chief Financial Officer of Madison Park, an agency that also owns over 1200 units of low income housing located in Boston. In addition, she provides financial consulting to smaller CDC's and has consulted with Strength Matters on a number of initiatives for many years, including the development of a number of webinars on a number of financial topics that were presented as an educational tool for the Affordable Housing Industry. Gayle spent 15 years at Ernst & Young after obtaining a Bachelor's of Science in Accounting at Boston College.

**[ghlacroix@roxburytenants.org](mailto:ghlacroix@roxburytenants.org)**

**Andrea Lowe**, COO, Corporate F.A.C.T.S., is a Senior Strategic Planning Consultant with 15 years of experience improving processes through needs assessments, goal planning and accountability measurement. She is a certified instructional designer with superb communication skills and a unique ability to transcend complex writing into visual displays that connect with audiences. Adept at cultivating relationships and driving engagement, Andrea can quickly identify departmental challenges and create strategies to improve performance.

In 2015/16, Andrea led the design of a Neighborhood Improvement Plan in the North Riverside, Jacksonville, FL neighborhood. Several City officials that attended our community engagement meetings indicated they were pleased with resident participation and the strategies that emerged from the planning sessions. Andrea also led Quality of Life plans for the Osborn and Cody Rouge neighborhoods in Detroit, Michigan and a strategic investment plan for Central Illinois on behalf of the Local Initiatives Support Corporation and State Farm Insurance Co. Our QOL plans reflect resident and resource driven priorities that align available funding with strategies so that implementation can begin right away. She is also leading a strategic plan for Houston LISC that involves helping the City of Houston shape an affordable housing investment strategy and build local capacity to carry-out the work.

Prior to joining C-FACTS, Andrea was a Vice President of Global Training for Citi Bank, responsible for developing strong, successful relationships with the Retail Bank senior leadership team. She built consensus on business training needs, developed training requirements and created curriculum outlines and storyboards. Andrea led the Global training team in launching Adobe Connect learning classrooms; on-line interactive training modules that offered training and capacity building for employees worldwide.

Andrea earned a BS in Mass Communications from Bennett College for Women in Greensboro, NC and an MA in Adult Education with a concentration in Organizational Development from North Carolina A&T State University in Greensboro, NC.

**[alowe@corporatefacts.net](mailto:alowe@corporatefacts.net)**

**Sheila F. Maith** is founder and president of Maith Consulting, supporting her clients in taking their leadership -- and their organizations-- to the next level. Her coaching, training and consulting includes work in strengthening leadership presence and communication skills, performance management, talent management, networking and influence skills. She draws upon her twenty-five years of experience as an executive, a funder, an advocate and a board member to deliver high value services to her clients. Prior to opening her consulting practice Sheila served as Community Affairs Officer and Senior Advisor for the Federal Reserve Board; as Managing Director of Policy and Leadership Development at the Fannie Mae Foundation, and as Senior Counsel to Senator Edward M. Kennedy on the Health, Education, Labor and Pensions Committee. She also held positions at Local Initiatives Support Corporation, The Enterprise Foundation and the Boston Redevelopment Authority. Sheila earned a joint degree in law and public policy from Harvard Law School and the Harvard Kennedy School of Government. She has an AB degree in public policy studies *magna cum laude* from Duke University and a certificate in Leadership Coaching from Georgetown University.

**[sheila@maithconsulting.com](mailto:sheila@maithconsulting.com)**

**Michael Monte** joined the executive leadership team in 2007 as CHT's Chief Financial and Operating Officer, providing strategic leadership, direction, and oversight of Champlain Housing Trust's operations and financial systems. He was a founder of Burlington Community Land Trust and a board member for Lake Champlain Housing, the two organizations that merged to form CHT. Michael has over 40 years of leadership experience in the community and economic development field, serving as the Executive Director of several nonprofit organizations including the King Street Youth Center. He also worked at Burlington's Community and Economic Development Office (CEDO) from its creation and was its longest serving Director. Michael was a founding partner of the independent community development consultant group, Burlington Associates, where he works with Community Land Trusts around the country.

Michael received the Con Hogan Award in 2016 recognizing his creative, entrepreneurial, and persistent community leadership, and is a graduate of the Achieving Excellence Program at the Harvard Kennedy School.

**[mmonte@champlainhousingtrust.org](mailto:mmonte@champlainhousingtrust.org)**

**M. Dana Moore**, Principal – Compass Advisors, LLC - has over 35 years experience in commercial real estate finance, credit analysis, portfolio management, property development, work-out and management. As a Chief Credit Officer for Fannie Mae, she managed a \$138 billion portfolio of multifamily debt and equity investments generating a net income of \$2426 million, with annual property financing of \$25.6 billion, including 7.7 billion in low-income housing tax credits. Over the last decade, Dana established Compass Advisors to provide consulting services to the nonprofit community. This has included providing workout expertise, mergers and acquisitions leadership, asset management and financial modeling services.

**[dmoore@compassadvisorsllc.com](mailto:dmoore@compassadvisorsllc.com)**

**John Moukad**, Principal at *in-context consulting*, has over thirty years of experience in housing and community development with a focus on business and financial analysis and capacity building. He has wide experience with community based organizations, national and regional intermediaries, local, state and federal government, foundations, and financial institutions. He currently has a consulting practice that provides analysis, program and strategy development, coaching, training, and transition support to CDCs, CDFIs, social enterprises, and the intermediaries and foundations that support them. Prior to starting his consulting practice he was a Vice President at YouthBuild USA where he created a loan fund and oversaw financial support to local YouthBuild programs in the organization's early years. He has also been a program officer with The Enterprise Foundation and a program administrator with the New York State Homeless Housing and Assistance Program. He is an AERIS analyst and has served as a reviewer and site visitor for various national competitions including the Treasury's CDFI Fund programs, the Corporation for National Service's Social Innovation Fund, and Harvard's Innovations in American Government Program. He is a graduate of Hamilton College and has a master's degree in real estate development from Columbia University.

**[jmoukad@gmail.com](mailto:jmoukad@gmail.com)**

**Vanessa Moulin** joined Calvert Impact Capital's Risk Management team in March 2016. As a Director of Risk Management, she provides subject matter expertise and advises management and the Investment Team on credit structuring, credit analysis and underwriting, portfolio quality, and credit policies. She also implements Enterprise Risk Management Initiatives to support the long-term growth of the organization.

Vanessa has over 15 years of experience working in financial services and risk management, and experience implementing programs to analyze and improve the performance of credit-sensitive portfolios and structured mortgage bonds. Prior to joining Calvert Impact Capital, Vanessa worked for Fannie Mae in various credit risk management roles for its investment portfolios, including its Residential Mortgage Backed Securities, Mortgage Revenue bonds, and Reverse Mortgages. She led the recovery program for Fannie Mae's distressed subprime portfolio. Before that, she worked for KPMG's Economic and Valuation Services practice, and for Fidelity Funding Financial Group in Dallas, Texas.

Vanessa completed her undergraduate studies in France and received her MBA from the University of Texas at Arlington. In the warmer months, she enjoys Stand-Up Paddling in nearby water spots; and practices yoga year-round.

**[VMoulin@calvertimpactcapital.org](mailto:VMoulin@calvertimpactcapital.org)**

**Michael Mullin** is CEO of Nevada HAND. Mike founded Nevada HAND in 1993 as a nonprofit company, recognizing that by combining his private sector development expertise with underutilized federal resources and an entrepreneurial spirit, he could improve housing opportunities for seniors with fixed incomes and working families. In the 25 years since its founding, Nevada HAND has grown into one of the largest and most respected local developers, builders and managers of well-conceived and well-crafted housing that residents are proud to call home. Nevada HAND is a trusted industry leader that provides high quality apartment homes and services to more than 3,000 seniors, 2,100 adults and 2,100 children in 33 locations throughout the Las Vegas Valley. With more than 250 employees, total assets of more than \$332 million and a 2018 budget of more than \$47 million, Nevada HAND will continue to play a vital role in the future as the organization develops and maintains sustainable housing as critical infrastructure for our community's growth.

**[mtmullin@nevadahand.org](mailto:mtmullin@nevadahand.org)**

**Beth Mullen** is a Partner and CohnReznick's Affordable Housing Industry Leader. She is also a member of the Firm's Tax Practice Executive Committee. She has more than 25 years of experience providing consulting, tax, and accounting services to real estate owners and developers and the community redevelopment industry.

Beth has been involved with the low-income housing tax credit (LIHTC) program since its inception and has provided consulting services to developers, state credit agencies, and investors. A significant portion of her time is devoted to helping put deals together by structuring public/private partnerships that are financed in part by the LIHTC, federal and state historic tax credit programs, the federal New Markets Tax Credit Program, energy tax credits, and historic rehabilitation tax credits. She manages the CohnReznick tax requirements for private corporate funds and publicly syndicated LIHTC partnerships comprising several billion dollars in invested assets.

Beth is involved on an ongoing basis in upgrading CohnReznick's state of the art financial analysis model that is used to structure transactions. She assists clients with tax planning and research and any necessary correspondence with the Internal Revenue Service and state taxing authorities. She is responsible for the Firm's tax quality control review of all tax returns for owners of affordable housing. Beth is an industry spokesperson and a frequently invited speaker at national and local industry trade conferences. She teaches internal and external courses on low-income, New Markets, and historic tax credits and has published articles in several trade magazines.

**[Beth.Mullen@CohnReznick.com](mailto:Beth.Mullen@CohnReznick.com)**

**Brittney Murphy** is EVP of Finance and CFO at Fahe, responsible for leading and coordinating Fahe's financial planning, for developing organizational procedures, exploring new financial endeavors, and managing the single-family loan portfolio, including REO management. She participates on committees that oversee/ensure compliance with all grant agreements and thereby helps ensure that project budgets are being drawn down and administered in a timely fashion. Her accounting experience and eye for detail contributes significantly to the success of special initiatives like the 502 Demonstration Project, and supports Fahe's leadership team in their efforts to work cooperatively across department lines to meet objectives of grants and other compliance driven bodies of work. Prior to joining Fahe, Brittney worked for an accounting firm specializing in nonprofit and governmental auditing.

**[bmurphy@fahe.org](mailto:bmurphy@fahe.org)**

**Kevin Myren** is a certified public accountant. He currently serves as Chief Financial Officer and Vice President of Administration at CommonBond Communities, headquartered in St. Paul, Minnesota.

**[Kevin.Myren@commonbond.org](mailto:Kevin.Myren@commonbond.org)**

**Shekar Narasimhan** is Managing Partner at Beekman Advisors which provides strategic advisory services to companies and investors involved in real estate, mortgage finance, affordable housing and related sectors. He serves as Chairman of Papillon Capital, focused on sustainable infrastructure investing and is the Co-Founder of the Emergent Institute in Bangalore, India. Shekar was appointed by the Governor of Virginia as a Member of the Board for the Virginia Housing Development Authority. Previously, he also served as Member of the Board for Housing and Community Development in Virginia and as a Commissioner on President Obama's Advisory Commission on Asian Americans and Pacific Islanders.

Shekar is formerly Managing Director of the Prudential Mortgage Capital Company, one of the nation's leading providers of commercial mortgage financing. Immediately prior to Shekar's time at Prudential, he was Chairman and CEO of the WMF Group, a publicly traded, commercial mortgage financial services company which was acquired by Prudential in 2000.

Shekar is a Senior Industry Fellow at the Joint Center for Housing Studies at Harvard University, a Board Member for Democracy Alliance, and is on the Economic Advisory Council for the Center for American Progress. He has served on several national and local boards of housing and related organizations, including several terms on the Mortgage Bankers Association of America (MBA) Board of Directors and was the first Chair of the MBA's Commercial/Multifamily Board of Governors.

Shekar has received the MBA's highest honor in 1999, the Fannie Mae Lifetime Achievement Award in 2003 and the Dean H.J. Zoffer Distinguished Service Medal from the University of Pittsburgh in 2010. He holds a BS in Chemical Engineering from the Indian Institute of Technology, New Delhi, India and an MBA from the Katz Graduate School of Business, University of Pittsburgh, Pennsylvania. He has earned the designation of Certified Mortgage Banker (CMB).

**[shekar@beekmanadvisors.com](mailto:shekar@beekmanadvisors.com)**

**Diane Olmstead** has over 30 years of real estate experience including, lending, acquisitions, joint-venture investing, corporate finance and capital-raising. During that time, she has originated and closed over \$3 billion in transactions as well as the workout and restructuring of over \$1.3 billion of real estate assets. Diane is currently President of Fillmore Capital Affordable Housing (FCAH), which is a mission driven, for profit investor in affordable and work force housing projects and platforms throughout the US. Prior to FCAH, Diane was Chief Investment Officer at BRIDGE Housing, a non-profit affordable housing developer/operator. Prior to BRIDGE, Diane was Co-CEO of W3 Partners, a value-add office acquisition company, which she co-founded in 2009 with Susan Sagy. Diane was responsible for W3's acquisitions, financing activities, fundraising and client relations. Prior to co-founding W3, Diane was a principal at CIM Group, an EVP at iStar Financial, and held various positions at USF&G, Aetna, Cigna and Pan American Properties. Diane received an M.B.A. from Pepperdine University, and serves on the Board of Extra Space Storage (NYSE : EXR). Diane is a member of Urban Land Institute (ULI), Pension and Real Estate Association (PREA), Institutional Real Estate, Inc. (IREI) and a former board member of Mercy Housing California (a non-profit affordable housing developer/operator). Diane is a mentor of young real estate professionals and a frequent guest speaker.

**[dolmstead@fillmorecapah.com](mailto:dolmstead@fillmorecapah.com)**

**Sara Olsen** is founder and CEO of SVT Group. Nothing drives Sara crazier than funders and investors, who mean to help, accidentally preventing organizations from solving problems by confusing outputs that are easy to count with meaningful outcomes. Captivated by the idea that one day investors could understand not only their financial return on investment but also their social returns, she started SVT Group, a certified B Corporation, in 2001. SVT's vision is a world in which it pays to do good, and its mission is to "make impact management ubiquitous." SVT has gone on to train 6,000 individuals in-person and assess the social and environmental value of over \$9Bn. Sara is also the co-founder of the Global Social Venture Competition, and of Social Value US, the United States' chapter of Social Value International, the professional home for those working to change the way society accounts for value.

**[sara@svtgroup.net](mailto:sara@svtgroup.net)**

**Steve Peelor** has over 20 years' experience in affordable housing finance and nonprofit management. He joined NeighborWorks Capital as Senior Loan Officer in 2016 and was promoted to Chief Lending Officer in 2017. Previously Steve was principal of Stage 11 Consulting, engaged as Chief Operating Officer to transition a national nonprofit from start-up to sustainable operations. Previously, during his 13 year tenure at Century Housing, a California multifamily CDFI, Steve held the positions of Director of Structured Finance, SVP of Lending, and SVP of Strategy. Prior to that he worked at City National Bank in Los Angeles as a Credit Analyst. He has a Bachelor of Arts in degree in Metropolitan Studies and a Master of Public Administration and Finance from New York University. Steve provides volunteer consulting through the Taproot Foundation and is a proud veteran of the US Navy.

**[speelor@neighborworkscapital.org](mailto:speelor@neighborworkscapital.org)**

**Brian Platt** joined IMA Financial Group in 2012 as Assistant Vice President in the Executive Risk group. His responsibilities include the successful marketing and placements of Executive Liability lines of coverage including Director & Officer Liability, Employment Practices Liability, Fiduciary Liability, Crime and Fidelity, Professional Liability, Kidnap & Ransom and Cyber/Privacy Liability.

Prior to joining IMA Brian spent 9 years as the underwriting Manager for a large international insurance company where he oversaw the Western Region for the Executive Liability book.

Brian received a Bachelor of Science, Finance from the University of Northern Colorado.

**[brian.platt@imacorp.com](mailto:brian.platt@imacorp.com)**

**Andrea Ponsor** is the Chief Operating Officer and Executive Vice President for Policy at Stewards of Affordable Housing for the Future, a collaborative of thirteen exemplary multi-state nonprofit affordable housing providers. In her role at SAHF, Andrea works with Congress, HUD, and other federal and state agencies to build support and remove barriers to the preservation and production of high-quality affordable rental housing. Prior to joining SAHF, Andrea was the Federal Policy Director for Local Initiatives Support Corporation (LISC) where she led housing policy efforts. Previously she was a principal at Hessel, Aluise and Neun, P.C., a boutique law firm with a national affordable housing practice, and an attorney with the U.S. Department of Housing and Urban Development in Atlanta, GA. Andrea holds a Juris Doctor degree from the University of Florida College of Law and a Bachelor's degree in Economics from Tulane University.

**[aponsor@sahfnet.org](mailto:aponsor@sahfnet.org)**

**Tracy Pride** is Senior Vice President, Director - Real Estate Practice with IMA Financial Group. With both insurance company and broker experience, Tracy has over 33 years in the insurance industry and has spent the last 18 years at IMA. Specializing in Multi-Family Real Estate accounts, Tracy has worked with the Housing Partnership Network sponsored insurance captive for Property, General Liability and Workers Compensation captive for the last 12 years.

Prior to joining IMA, Tracy spent 14 years as a General Liability / Umbrella Liability Underwriting Manager for the Rocky Mountain Region for a U.S. insurance company.

Tracy graduated from the University of Wisconsin – Eau Claire with a Bachelor of Business Administration degree.

**[tracy.pride@imacorp.com](mailto:tracy.pride@imacorp.com)**

**Karen Przepyszny** is the Managing Director of Special Initiatives at the National Equity Fund where she is working on new programs, including Opportunity Funds, policy initiatives and implementing an internal strategic plan. She spent the past ten years as Senior Vice President of Investor Relations where she was responsible for overseeing the placement of \$500 million of product annually with of NEF's proprietary investors. Prior to that Karen was SVP of Acquisitions where she helped to restructure the production process for the acquisition department and was responsible for overseeing the development of new programs and initiatives. She started with NEF in December, 2000. NEF is a national organization and has offices in 11 locations. Previous to her position at NEF, Karen was the Senior Vice President of Equity and Lending at Banc One Community Development Corporation overseeing production in 15 markets. From 1989-1997 she worked in various capacities at Enterprise Social Investment Corporation, assisting in structuring and managing state and local LIHTC equity funds. She has also served as an underwriter with the Illinois Housing Development Corporation and a planner at the City of Chicago Department of Housing. She graduated from the College of William and Mary in Virginia and received a Masters in Urban and Regional Planning from the University of Illinois at Champaign-Urbana in 1982.

**[kprzepyszny@nefinc.org](mailto:kprzepyszny@nefinc.org)**

**Rebecca Regan** joined the Housing Partnership Network as President, Capital Markets, in April 2011. In this role, she develops and manages the Network's capital market relationships, oversees HPN's Communications and Philanthropy work and raises debt and equity capital for Network social enterprises. As an Executive Vice President, she is a member of the Executive Team of HPN. She also plays an active role in business collaboration, R&D Innovation, design and peer exchange among the network's high-performing affordable housing organizations and CDFIs. Current business collaboration underway is for a \$250 million impact fund for enterprise capital and a technology platform for health data and analysis across member properties to demonstrate where housing organizations can create shared value with health systems using a population health model.

Becky previously served as chief operating officer for Boston Community Capital as well as president of its Loan Fund, a \$125 million loan fund focused on community development investments including affordable housing, charter schools and health centers. Prior to joining Boston Community Capital, she held executive, real estate lending and management positions with Bank of America, Fleet Bank, Bank of Boston and BayBank.

She was previously a long-time member of New England Women in Real Estate (NEWIRE), the Massachusetts Grocery Access Task Force, and member of the board and finance committee for Mother Caroline Academy and Education Center, a school for low-income girls in Dorchester. She was appointed by the governor of Massachusetts to MassHousing's Home Ownership Advisory Committee and is a former elected member of the Town of Wayland Planning Board. She serves on the board of directors of New Ecology, Inc., a nonprofit that seeks to become a catalyst for sustainable development in urban communities, the board of directors of Community Health Center Capital Fund, NeighborWorks Capital and Finance Committee, Low Income Investment Fund's Regional Advisory Committee and the Low Income Advisory Board of IMPACT CIL CDFI.

Becky holds a BSBA from the Boston University School of Management and an MBA from Babson College.

**[Regan@housingpartnership.net](mailto:Regan@housingpartnership.net)**

**Joseph F. Reilly** has served as the President and CEO of The Community Development Trust since 2007. CDT is a privately-owned, double-bottom line company which has a mission of providing long-term capital for the preservation of affordable housing while also generating market rates of return for its investors. CDT provides long-term loans and long-term equity investments which help to stabilize affordable housing properties throughout the United States. The gross value of CDT's investment portfolios currently totals over \$1.6 billion and includes loans and investments which support over 46,000 affordable rental units in 44 states. Under his 10 years of leadership, CDT successfully navigated the challenges of the financial crisis and doubled in size. CDT also expanded its lending platform to include long-term loans to support charter schools.

Joe's career in the field of community development and affordable housing finance spans 40 years. He began his career in the field of community development in 1978 with the Northwest Bronx Community and Clergy Coalition. In 1983, he moved on to the New York City Department of Housing Preservation and Development. In 1989, he joined JPMorgan Chase where spent 18 years and became JPMC's National Manager for Community Development Real Estate, a position where he was responsible for managing a staff of 70 professionals who financed affordable housing and community development projects across the United States.

Joe currently serves on the boards of two Community Development Financial Institutions - The Raza Development Fund and The Leviticus Fund. He previously served on the boards of The Low Income Investment Fund, Enterprise Community Investments, Neighborhood Housing Services of New York City, and the National Association of Affordable Housing Lenders. He also served as Chairman of Fannie Mae's Affordable Housing Advisory Council.

Joe received a BBA from Iona College in 1981 and completed The General Manager Program at Harvard Business School in 2003. Mr. Reilly also served as an Adjunct Professor for real estate finance at New York University from 2007 - 2014.

**[jreilly@cdt.biz](mailto:jreilly@cdt.biz)**

**Kathy Rock**, Executive Vice President, Chief Financial Officer and Chief Administrative Officer, is responsible for the strategic leadership of LIIF's financial management. She oversees the organization's capital raising activities, treasury management and all administrative operations. Kathy works closely with LIIF's Board of Directors on all financial planning and operational infrastructure matters. Prior to joining LIIF as CFO and CAO, Kathy was a member of the LIIF Board of Directors. Most recently, Kathy was the Chief Financial & Risk Officer at the Calvert Foundation and a Senior Financial Advisor for Kiva.org. Her previous experience includes positions as CFO of Mercy Housing, CFO and SVP, Loss Mitigation, for Genworth Europe and Canada, and the Controller for the Federal Housing Administration (FHA) of the U.S. Department of Housing and Urban Development during the Clinton Administration.

**[krack@liifund.org](mailto:krack@liifund.org)**

**Katie Rodriguez** joined the Housing Partnership Network in July 2012. As the Vice President of Lending and Investment, Katie leads business and product development and raises capital for HPN's lending efforts as well as the underwriting of HPN equity investments. Additionally, she manages HPN's New Market Tax Credit Program and serves as the President of The Housing Partnership Fund, Inc. and Housing Partnership Ventures, Inc.

Katie has a diverse background in asset management across a variety of real estate asset classes, and has significant experience in the workout of distressed loans and REO assets. Prior to joining the Network, she worked as an Asset Manager for UC Funding, a structured finance firm in Boston, where she managed a national portfolio of commercial and multifamily properties. Previously, Katie was a Senior Analyst at Anglo Irish Bank where she supported the management of a \$1 billion commercial real estate portfolio, a Financial Analyst at Harvard University responsible for the analysis and budgeting of over 2.5 million square feet of commercial and university real estate holdings, and an Account Executive in the Structured Finance group at Capital Source Bank in Chevy Chase, MD.

Katie holds a BBA from George Washington University and an MBA from Boston University where she completed coursework in finance, marketing and real estate development.

**[rodriguez@housingpartnership.net](mailto:rodriguez@housingpartnership.net)**

**Valorie G. Schwarzmann**, J.D., CPA, is Chief Financial Officer at Homeport. Valorie joined Homeport in September 2010 as its Chief Financial Officer after serving on its Board of Directors for three years from 2007-2010, most recently as its Treasurer. Her responsibilities include overseeing the financial systems, processes, planning, and reporting for all lines of business conducted by Homeport; Asset Management; HR and IT; and Grants Administration. For almost twenty years prior to joining Homeport, Valorie worked in public accounting where a significant number of her clients required tax planning and tax return preparation for low income housing tax credit projects. Much of her not-for-profit experience was developed by serving on five (5) not-for-profit Boards of Directors as well as tax consulting with many not-for-profit entities. She received a B.A. from Ohio Wesleyan University, received a Juris Doctorate from New England School of Law, and is a Certified Public Accountant.

**[valorie.schwarzmann@homeportohio.org](mailto:valorie.schwarzmann@homeportohio.org)**

**Curtis Schneider** has 22 years of experience working for Community Resources and Housing Development Corporation (CRHDC) as the CFO. CRHDC develops single family and multi-family housing, does property management, provides counseling services, does mortgage and business lending. In addition to experience with affordable housing, Curtis has a wide range of experience overseeing the finances of many grant programs including the following: LIFT, NSP2, and Rural Grant programs such as USDA Self Help Housing, HUD SHOP, DOL Temporary and Permanent Assistance, and USDA Farmworker Housing.

**[curtis@crhdc.org](mailto:curtis@crhdc.org)**

**S. Scott Seamands** is a partner of Lindquist, von Husen & Joyce LLP in San Francisco, California. He joined the CPA firm in 1980 and served as partner in charge of the firm's audit and accounting department, as well as a managing partner, for 20 years. Scott handles many of the firm's clients in the areas of Real Estate Development and Management, affordable housing properties and not-for-profit organizations. He has testified as an expert witness in the area of construction accounting. Scott is a member of the American Institute of Certified Public Accountants and the California Society of CPAs. During 2012-13 he served as President of the San Francisco Chapter of the California Society of CPAs and currently chairs the statewide organization's Audit Committee. Scott earned his BS in business (concentration in accounting) from San Francisco State University and did post-graduate work at Catholic University in Washington, DC and Golden Gate University in San Francisco.

Scott contributes to NeighborWorks and Strength Matters by writing papers, hosting webinars, consulting with CFOs and is the author and co-presenter of the Strength Matters Boot Camp on Financial Reporting for Rental Housing Nonprofit Enterprises.

**[sseamands@lvhj.com](mailto:sseamands@lvhj.com)**

**Tulip Shah** is President of Keystone Strategic Advisors. Keystone Strategic Advisors is a social sector consulting firm specializing in providing advisory services to clients across four broad areas: New business development and financial modeling; Strategic planning and marketing; Streamlining mission critical business processes; and Technical capacity building and organization alignment.

Tulip Shah brings extensive credentials, knowledge, and deep hands - on experience in both the commercial and social sectors. He has practiced extensively in strategic planning and marketing, business development, business process redesign, and program management of major enterprise business applications.

Much of Tulip's business process redesign, continuous improvement (*kaizen*), six sigma and lean management skills have been honed in the hyper-competitive automotive sector, specifically at General Motors and Delphi and by working closely with Toyota, the leading 'lean' exemplar in the world. At Delphi, he oversaw the streamlining of several enterprise-critical business processes and implemented eBusiness solutions and IT systems across several value streams to significantly improve enterprise operational efficiency.

More recently, he has assisted several social sector enterprises like the grantees of Knights Foundation, Robert Wood Johnson Foundation, Lumina Foundation, and NeighborWorks America, as well as several foreign-based not-for-profit organizations to capacitate for sustainable growth and significantly improve operational efficiency and organization alignment.

Tulip has multiple degrees, including the Kellogg School of Management (AEP, Business) and the University of Michigan-Ann Arbor (MBA, Finance). He also holds certifications in Six Sigma, Decision & Risk Analysis, Negotiations, and Creative Leadership.

**[tulip@value - creators.com](mailto:tulip@value-creators.com)**

**Julia Shin** is a vice president of innovation and managing director of impact investing for Enterprise Community Partners, Inc., where she focuses on financial innovation and new capital relationships. Julia brings deep private sector experience to Enterprise, both as banker and a transactional lawyer. Before joining Enterprise in 2013, Julia was a derivatives banker at Citi where she structured index, fund and structured-note solutions for institutional and retail clients. Prior to Citi, she was an investment banker at Goldman Sachs where she structured financial instruments and solutions, and worked on new product development. Previous to her investment banking work, Julia worked as a corporate attorney in New York City at Cravath, Swaine & Moore and Covington & Burling, representing institutional clients with focus on mergers and acquisitions, securities law and banking law. Julia currently serves on the board of the Clean Energy Group and on the Advisory Committee to NatureVest's Accelerator Fund. She received her Juris Doctor and Master of Arts in economics from the University of Chicago and received her undergraduate degrees from MIT.

**[eshin@enterprisecommunity.org](mailto:eshin@enterprisecommunity.org)**

**Brian Shuman**, Consultant with MAB Financial Advisors, has served in various senior financial roles over the past 25 years within the multi-family real estate industry; conventional and affordable. Most recently, Brian served as the Chief Financial Officer for LINC Housing, a nationally recognized affordable housing developer. Brian had primary responsibility for managing LINC's assets and financial resources and attracting new sources of financial capital to further enable the organization's growth. This included securing private sector equity, leveraging LINC's existing portfolio, and utilizing new funding sources to create and preserve affordable housing. He also oversaw cash management of LINC's real estate portfolio, accounting, finance, organization-wide budgets, and treasury, safeguarding LINC's assets by maintaining proper controls. Brian provided oversight of human resources, payroll and IT, and manages LINC's corporate staffing assets. He also evaluated potential new business opportunities, employee benefits, and other issues affecting the financial position of the organization.

Prior to LINC Housing, Brian was Chief Financial Officer of Forum Real Estate Group, a private equity real estate organization having sponsored nearly 20,000 multi-family units. While at Forum, he was responsible for providing strategic leadership and direction for all back-office functions, with primary responsibility for accounting, tax, treasury management, financial planning and analysis, compliance, risk management, and financial reporting. Prior to joining Forum Real Estate Group, Brian served as Chief Financial Officer for Griffis Residential, Carmel Partners and Mercy Housing and as Senior Vice President of Finance for Aimco, an S&P 500 multifamily housing REIT.

Brian graduated from the University of Maryland with a B.A. in Economics and Accounting and is a Certified Public Accountant. Brian has served on the Board or as a Trustee of the Housing Partnership Network, Housing Partnership Equity Trust, Mercy Loan Fund, LINC Housing, Stewards for Affordable Housing for the Future, and the National Affordable Housing Trust.

**[byshuman@yahoo.com](mailto:byshuman@yahoo.com)**

**Matt Slep** is Founder and Managing Partner of Terra Search Partners. Matt founded Terra Search Partners in January of 2006 to create an executive search boutique in real estate focused on high quality execution, client oriented consultative recruiting and associated services. Matt is the firm's Managing Partner. Prior to forming Terra, Matt opened a San Francisco office for Ferguson Partners and was a Partner with Heidrick & Struggles, following its acquisition of Argonaut Search Group, where he was a Partner. Prior to becoming an executive recruiter, Matt was the Executive Director of the Urban Land Institute's Multifamily Housing Institute in Washington, DC which he founded in 1994 and ran until 1998. Earlier in his career, Matt was the National Affordable Housing Finance Director for the Resolution Trust Corporation. Before working at the RTC, Matt was a developer and asset manager with NV Commercial, a northern Virginia-based commercial property company. He served as Vice President for Reilly Mortgage (now part of Wells Fargo), then one of the country's leading apartment lenders, and as Acquisitions and Development Director for the National Housing Partnership. Matt started his career as a lobbyist for the National Association of Housing Cooperatives. Matt received a B.A. in Political Science from Oberlin College. He has been a contributing columnist to NAREIT's magazine on leadership issues in the real estate industry and a member of the Board of Directors of the National Multihousing Council. A Governor of the ULI Foundation, Matt is an active participant in ULI as a member of its Multifamily Council and the San Francisco District Council's Board. Matt is a founding Board member of ExtraFood.Org and past Secretary of the Board of the Jewish Home of San Francisco. Matt is the host of the podcast series, Leading Voices in Real Estate, where he interviews leaders from throughout the real estate business about their leadership journeys and their work in the industry.

**[matt@terrasearchpartners.com](mailto:matt@terrasearchpartners.com)**

**Celia D. Smoot** is currently the Director of LISC's LISC Housing Group. As Director she oversees the technical assistance delivery and analysis of the financial viability and capacity of nonprofit entities in their management and operation of subsidized affordable multifamily housing. In addition, she oversees all Housing lending that ranges from underwriting lines of credit, predevelopment and acquisition loans dealing with preservation, recapitalization of housing authority assets and low income housing tax credit projects, as well as, the regulatory reviews of HUD assisted financing, rent subsidies and low income. Celia has extensive real estate finance background, specifically in the areas of affordable housing and community development. Prior to joining LISC, she was an attorney with the U.S. Department of Housing and Urban Development and later in private practice with Hessel, Aluise and Neun, P.C, a national law firm with a focus on affordable housing, and Kutak Rock, LLP in their tax credit practice. Celia received her Bachelor's in English from the University of North Carolina at Charlotte and her Juris Doctorate from The George Washington University.

**[csmoot@lisc.org](mailto:csmoot@lisc.org)**

**Robert M. Snow** is the Vice President, Dispositions at the National Equity Fund, Inc. Bob has more than 30 years of experience in affordable housing. Before joining NEF in 2012, Bob worked for National Affordable Housing Trust for 20 years; 10 years leading its Asset Management department and 10 years managing its development consulting group. Prior to NAHT Bob was Executive Director for the Ohio Energy Action Corporation, which provided financial incentives for green energy retrofits. He has a BA in Government and Law from Lafayette College.

**[rsnow@nefinc.org](mailto:rsnow@nefinc.org)**

**Rodney Sommers** is a principal in the Dover, Ohio office of Novogradac & Company LLP. Mr. Sommers has more than 20 years of experience with a strong emphasis on audit, specifically for nonprofit and real estate entities. His experience in the real estate industry has emphasized affordable housing developments, including those subject to the auditing requirements of the U.S. Department of Housing and Urban Development (HUD), and nonprofit organizations, including those subject to government auditing standards and Uniform Guidance. He also has experience in a variety of other industries including renewable energy tax credit (RETC) and historic tax credit (HTC) entities. He graduated from Kent State University and is a member of the American Institute of Certified Public Accountants. Mr. Sommers is licensed in Ohio as a certified public accountant.

**[rodney.sommers@novoco.com](mailto:rodney.sommers@novoco.com)**

**Steven Spears** comes to Mercy Housing with more than 30 years of experience in financial services. He is responsible for ensuring the integrity of financial reports and strategic financial planning for Mercy Housing, as well as playing a leading role in setting the overall strategic direction for the organization and assuring the long-term financial sustainability and growth of Mercy Housing.

Most recently, Steve served as Chief Deputy of the California Housing Finance Agency (CalHFA). While serving as CalHFA's Acting Executive Director in 2009, he played an integral role in the Agency's ability to secure \$5 billion of federal assistance during the country's economic crisis. As a result, the Agency stabilized its financial position and returned to lending activity the same year. Steve also served on the Board of Directors of the National Council of State Housing Agencies. Prior to joining the California Housing Finance Agency, Steve was Managing Director with The SAER Group at KP Advocates and MetWest Financial and Strategic Services with a financial consulting practice that focused on strategic solutions to a variety of problems facing state and local government. He also served as Deputy State Treasurer for Public Finance under California State Treasurer Matt Fong and as Fong's Legal Counsel at the Board of Equalization.

Steve received his law degree from the McGeorge Law School at the University of the Pacific, his Masters of Business Administration in Finance from the University of Tennessee and his Bachelor of Science degree in Accounting from Southern Adventist University. Additionally, he has been involved with teaching, coaching and mentoring youth for more than 30 years and currently serves on the Board of Trustees of Pacific Union College in Angwin, California.

**[sspears@mercyhousing.org](mailto:sspears@mercyhousing.org)**

**David H. Steinwedell** is a 34 year veteran of the commercial real estate industry and has worked in a variety of disciplines including public and private investment management, acquisitions, debt, capital markets, investment banking and asset management. David is the President and CEO of Affordable Central Texas (ACT) in Austin, TX, a fund sponsor with a current focus on preserving workforce multifamily housing utilizing private equity through the Austin Housing Conservancy Fund.

Prior to ACT, David was Executive Director of the Urban Land Institute (ULI) in Austin, TX in addition to being Managing Partner of Stoneforge Advisors, LLC, a real estate investment and advisory firm. Throughout his career, he has worked with multiple property types including multifamily, office, industrial, single tenant net lease, hotel, land and single-family land development. He is former managing partner and investment committee chairman of AIC Ventures, where he was an equity partner and oversaw acquisitions of long term sale-leasebacks and net leased assets with middle market credits. While at AIC, David completed over \$380 million of acquisitions, growing assets under management to almost \$800 million.

David formerly served as president of Wells Fund Management at Wells Real Estate Funds, leading the development of a real estate investment product and management team dedicated to serving institutional investors. Also at Wells, David served as chief investment officer for five years leading a team of professionals responsible for Wells' real estate investment strategy representing over \$9 billion in acquisitions, \$300 million in development and \$4 billion in finance in a series of non-traded office REITS, a value add fund, 1031 and limited partnership vehicles. Prior to Wells, David held executive positions at Jones Lang LaSalle and Cushman Realty Corporation where he directed and grew operations of investment banking and brokerage units in the South, resulting in \$2.2 billion in transactions across a spectrum of asset classes. David oversaw asset management, disposition and acquisition activities in the Southwest for pension funds and for the general account as a managing director at Aetna Life & Casualty. He completed the foreclosure, asset management and sale of over 400 assets across all property types.

As the recipient of numerous industry awards and accolades, David is a past member of the Board of Directors for the National Association of Real Estate Investment Managers (NAREIM). He is an Urban Land Institute (ULI) member, a past member of the Executive Committee of ULI Atlanta and a mentor and Chair of the Affordability Strategic Council of ULI Austin. David is the past-president of the Tritt Foundation. He actively participates with CommunityFirst Village, Mobile Loaves and Fishes and Habitat for Humanity. David earned a bachelor's degree in economics from Hamilton College in Clinton, N.Y.

**[steinwedell@affordablectx.org](mailto:steinwedell@affordablectx.org)**

**Paul Sussman** is an independent consultant to nonprofit organizations, small businesses and philanthropies. Until 2017, he served as Chief Financial Officer of Tenderloin Neighborhood Development Corporation (TNDC), a San Francisco community development corporation with an annual operating budget of \$50 million. Prior to joining TNDC, Paul was the founding President of the Northern California Community Loan Fund, a pioneering social investment institution. He began his career as an affordable housing developer with several neighborhood-based San Francisco nonprofit organizations.

**[Paul@PaulSussman.net](mailto:Paul@PaulSussman.net)**

**Nathan D. Taft** is Partner/Managing Director Acquisitions at Jonathan Rose Companies. Nathan joined Jonathan Rose Companies in 2004 where he oversees the acquisition and preservation of affordable, mixed and middle income multifamily housing nationally. He has lead the investment of six equity funds, helping Rose grown into one of the country's leading developers and investors in the field with a portfolio of 15,000 units. As a mission-driven firm, Rose acquires multifamily housing in transit-oriented or walkable locations, preserves its affordability, improves its economic and environmental performance, and works to enhance the lives of its residents. We acquire properties directly or in joint venture with local partners who share our vision and commitment to making an impact.

Last year, Nathan and his team were recognized as the top acquirer of affordable housing in the country, and he is passionate about doing his part to create more vibrant and resilient communities for low-income families and seniors. Nathan lives with his wife and two kids in New York City.

**[nathan@rosecompanies.com](mailto:nathan@rosecompanies.com)**

**Bob Taylor** is an Executive Director within the Community Development Finance group of Morgan Stanley. In this role he oversees a portfolio of low income housing tax credits, affordable housing acquisition and preservation investments, syndicated credit facilities, New Markets Tax Credits, as well as small business loans and investments. He has worked in banking and financial services for 34 years, and is a graduate of the University of San Diego. He and his family live in the San Diego area.

**[robert.taylor@morganstanley.com](mailto:robert.taylor@morganstanley.com)**

**Christina Travers**, Vice President, Finance & Capital Strategies at the Low Income Investment Fund. Ms. Travers joined LIIF in July of 2018. In her new role, Christina is responsible for raising capital to support LIIF's loan portfolio and serves as liaison with, and resource to, LIIF's banking and other lending relationships. Additionally, she manages LIIF's budget process, financial forecasting, investment portfolio management, cash management and treasury services. Prior to joining LIIF, she spent ten years at Local Initiatives Support Corporation (LISC) as its Senior Vice President for Finance & Capital Strategies. In this role, she oversaw LISC's financial planning and analysis, maintained relationships with LISC lenders, and supervised the loan servicing of LISC's loan portfolio. Prior to joining LISC, Christina worked as a Policy Analyst at New York City's Department of Health and Mental Hygiene. She is also a Returned Peace Corps Volunteer, completing her service in Zambia, Africa.

Christina earned her B.S. in Biology from Duke University and her M.S. in Urban Policy and Management, with a concentration in Community Development Finance, from The New School in New York City.

**[ctravers@liifund.org](mailto:ctravers@liifund.org)**

**Kenneth Trigueiro** is Executive Vice President and Chief Financial Officer at Peoples' Self-Help Housing (PSHH). Trigueiro has been with Peoples' since 2005 with past responsibilities over rental housing acquisitions, development, financing and construction. He also serves on the board of PSHH affiliate Peoples' Opportunity Fund, a certified Community Development Financing Institution.

Previously, he worked in project development management at the Housing Authority of the City of Paso Robles and in residential real estate lending at Bank of America. He also served as treasurer at Franklin Templeton Bank & Trust Company. Prior to that he was responsible for construction and financing of affordable and for-market rate multi-family rental housing projects in Silicon Valley, in addition to commercial and agricultural property management as Vice President and Chief Financial Officer of Cilker Orchards, a family-owned real estate developer with diversified holdings in Northern and Central California.

Trigueiro holds a MBA in finance and banking from Golden Gate University of San Francisco and a degree in agricultural business management from Cal Poly State University, San Luis Obispo.

**[KennethT@pshhc.org](mailto:KennethT@pshhc.org)**

**Mary White Vasys** has more than thirty-five years' experience in banking, real estate development and community affairs. She is the founder and principal consultant of Vasys Consulting Ltd., which provides innovative program design and implementation, organizational assessment, and financial consulting services to foundations, institutional investors, and nonprofit organizations. Recent assignments include the design and launch of a \$100 million place-based impact investment fund in Chicago, the underwriting of community development financial institutions for national foundations, the successful merger of two nonprofit organizations, the completion of comprehensive financial and organizational assessments of nonprofit housing developers for an institutional investor, and the coordination of research and product development for a national initiative to advance the nonprofit housing sector's financial strength. She is a ratings analyst for AERIS, Inc., which issues ratings for community development financial institutions.

Prior to forming Vasys Consulting Ltd. in 2001, Mary spent ten years with Bank of America where she was responsible for the bank's community-focused businesses in a ten-state region and managed a team of professionals that underwrote debt and equity financings for affordable housing developers, nationally recognized nonprofits and small businesses. She began her career as a commercial real estate lender, then developed urban mixed-use projects for a Chicago-based real estate company, and led the asset management services division of a national commercial real estate investment firm.

**[mwvasys@vasysconsulting.com](mailto:mwvasys@vasysconsulting.com)**

**Dee Walsh** serves as the Executive Vice President and Chief Officer of Strategic Development for Mercy Housing, Inc., a national developer, owner and manager of affordable housing. At Mercy, Dee oversees four regional business centers and the Mercy Loan Fund.

Walsh joined Mercy Housing following her work as the Chief Operating Officer at Network for Oregon Affordable Housing (NOAH), where she managed operations, lending, communications and strategic plan implementation. While there, Walsh raised nearly \$30 million in new capital to fuel the organization's affordable housing lending. Before NOAH, Walsh served as the Executive Vice President for Network and Corporate Affairs for Housing Partnership Network—leading domestic and international peer learning among HPN's members to advance housing development practices. As REACH Community Development's Executive Director for 22 years, Dee directed the organization's housing development and property management work, and created nationally recognized resident services and neighborhood revitalization programs.

Walsh holds a Certificate in Achieving Excellence in Community Development from Harvard University, and a master's degree in Urban Planning from University of Washington. Dee was an adjunct professor at the Center for Real Estate Development at Portland State University and is the co-author of the book, *Navigating Community Development*.

**[dwalsh@mercyhousing.org](mailto:dwalsh@mercyhousing.org)**

**Chuck Wehrwein** is the Chief Operating Officer and Executive Vice President for the Housing Partnership Network. In this role, Chuck oversees operations, multifamily and homeownership enterprises and programs, membership, governance, and the International Housing Partnership. He serves as a member of HPN's Executive Leadership Team and plays a key role in managing collaboration among HPN programs and member-driven social enterprises.

Chuck returned to HPN following four years at NeighborWorks America, where he served as Chief Operating Officer from 2012 until 2016. During his tenure, he led field operations, national initiatives, applied research, training, organizational assessment, and information management. He also served as acting Chief Executive Officer in 2014 before resuming his role as COO.

Previously, Chuck was a member of HPN's executive team from 2007 to 2012, where he was instrumental in managing growth and development of the award-winning business collaborative.

A recognized leader in the housing and community development sector, Chuck has held a number of senior-level roles throughout his career, including seven years as Senior Vice President for Real Estate Investment and Strategic Investment at HPN member organization Mercy Housing, Inc. In addition, Chuck served as Chief Operating Officer of the National Equity Fund, Deputy Assistant Secretary for Multifamily Housing at the U.S. Department of Housing and Urban Development, and Deputy Administrator for Multifamily Housing at the U.S. Department of Agriculture's Rural Housing Service and Chief Financial Officer of Thrush Development Company. Chuck is also a certified public accountant.

**[wehrwein@housingpartnership.net](mailto:wehrwein@housingpartnership.net)**

**Rick Wishcamper**, President and member of Wishrock's Executive Committee, is responsible for business development and the formulation of the company's investment and development strategies. Rick is experienced in new construction, renovation, urban development, commercial, and mixed-use development.

Prior to working in the field of real estate development, Rick taught entrepreneurship and strategic management at the University Of Montana School Of Business. He currently serves on the boards of several Missoula non - profit organizations, including the Mayor's Council on Affordable Housing, where he most recently led a successful funding campaign to build a new homeless shelter for the city.

Rick holds a Master's in Business from The University of Montana, a Master's in Fine Arts from New England College, and a bachelor's degree in human ecology from the College of the Atlantic.

**[rick.wishcamper@wishrockgroup.com](mailto:rick.wishcamper@wishrockgroup.com)**