

Strength Matters Annual Meeting & Financial Management Conference 2019 Biographical Sketches

Allison Adduci is Senior Vice President of Finance and Accounting at Preservation of Affordable Housing, Inc. (POAH) and is responsible for the integration and coordination of all accounting aspects of the organization, its subsidiaries and its multiple operating partnerships. She ensures that all activity is captured and properly recorded and acts as a liaison with POAH's management company, POAH Communities, as well as investors, lenders, finance agencies, and accountants. She also manages corporate reporting, budgeting and forecasting as well as oversees the development accounting process for the properties that POAH owns. Allison previously worked as a property accountant for The Community Builders and as an audit manager specializing in affordable housing for Ziner & Company, PC (later Ziner, Kennedy & Lehan, LLP). She has a Bachelor's Degree in Business Administration from Bryant University.

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Lisa B. Alberghini, Executive Vice President of the Housing Partnership Network, has over 35 years of experience developing affordable and mixed-income housing, overseeing the development efforts on more than 3,000 units of housing. Prior to joining HPN, Lisa was the President of the Planning Office for Urban Affairs, Inc. (POUA), a Boston-based non-profit developer, where she led the organization's housing and commercial development work, advocacy efforts and social justice initiatives, and played a significant role in influencing Federal, State and local affordable housing policy.

Prior to joining POUA, Lisa worked at The Community Builders for eighteen years, serving as Director of the Boston Office during the latter part of her tenure there. As Director of the office Lisa oversaw the work of the Development, Property Management, Human Services and Legal departments in conjunction with department directors. She has also served on HPN's Board of Directors, among many notable affordable housing and social advocacy board positions over her career.

Lisa has extensive experience combining multiple financing resources to ensure project feasibility and accomplish mission objectives, and is committed to increasing the influence of the non-profit development sector in the United States. She has developed rental, homeownership and mixed-tenure properties for family, elderly and special needs populations. Lisa has been a teaching assistant in Housing Policy at Tufts University; and a guest lecturer at Harvard University, Boston College, Boston University, M.I.T., the Urban Land Institute, and at numerous national conferences and events. Lisa currently serves on the MassHousing Multi-Family Advisory Committee as an appointee of the Governor of Massachusetts; on the City of Boston Housing Task Force as a Mayoral appointee; and on the Boston-based non-profit New Lease for Homeless Families.

In her role at HPN Lisa will lead and oversee membership, policy, communications, governance, and the International Housing Partnership, serving as a member of HPN's Executive Leadership Team and playing a key role in managing collaboration among HPN's Members.

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Mark R. Alberico is Vice President Finance & Administration at Neighborhood Finance Corporation. Mark manages all internal and external financial reporting, including internal and external financial statements, payroll coordination, grant expense reporting, and annual reporting to three federal agencies for Neighborhood Finance Corporation, NFC Cedar Rapids LLC, and NFC Properties LLC. Mark is also responsible for budget development, progress and variance reporting, as well as all information technology issues and processes, including website maintenance. In addition, Mark oversees all human resource functions, plus management and maintenance of the Neighborhood Finance Corporation building and surrounding property.

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Douglas M. Bibby is President of the National Multifamily Housing Council (NMHC), a national organization of more than 1,400 member firms involved in the nearly \$3 trillion multifamily housing industry. Under his leadership NMHC represents the industry on Capitol Hill and before the regulatory agencies, promotes research and the exchange of information, and advocates for rental housing across a broad spectrum of issues. Prior to joining NMHC, Doug spent 16 years as a senior officer of Fannie Mae, where he served on the company's Management Committee throughout his tenure. He was part of the top management team that is credited with the remarkable turnaround at Fannie Mae in the book Good to Great. Doug began his career with the worldwide communications firm J. Walter Thompson where he served a variety of clients both domestically and internationally over his 12-year career with the company. At the time of his departure from J. Walter Thompson, he was Senior Vice President and General Manager of the firm's Washington, D.C. operations. Doug has been active in the non-profit community of Washington, D.C. for the past 30 years. Doug graduated from Denison University with a B.A. degree and was honored with the university's Alumni Citation Award in 2004. He also holds a Masters of Business Administration degree from the University of Texas at Austin.

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Alex Beletsky is with Strathmore Advisors, LLC. Alex has broad experience across many industries, and is an innovator in helping organizations leverage technology and information to improve operations, increase profits and decrease costs. In the past, Alex served as a Management Consultant at Deloitte and Touche, as Chief Information Officer (CIO) and Chief Innovations Officer (CiO) for both small and large Commercial Real Estate companies, started and was CEO of a systems integrations and managed services provider focusing on IT outsourcing, Field Service and Contact Center Optimization and Managed Services (sold to Polycom), founded a SaaS company, Dispatch technologies (www.dispatch.me) which focused on optimizing communication, information flow and consumer experience in the home service space between large organizations, the service providers they use and the tenants owners they service (sold to Vista Capital Partners).

Currently, Alex is focusing on Venture Capital, where he has backed more than 20 start-ups, Real Estate investing, and Mentoring and Advisory services. Through Strathmore Advisors, he engages with and advises small and mid-sized organization who would like to take advantage of current technology and information management trends who want to begin or continue to transform their business to become more agile and tackle the future with an open mind.

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Brad Blake is the Vice President of Information Technology for Preservation of Affordable Housing (POAH) directing the organization's information technology strategies and ensuring IT services are appropriate to support POAH's mission. Brad establishes the company's technical vision and leads all aspects of the company's technology development, platforms, partnerships, external relationships, and IT projects. He also manages IT Security, is the Chair of the internal IT Steering Committee, and serves on the long term POAH strategic planning committee. Brad's career spans 22 years in Information Technology working for various organizations in leadership roles such as Chief Technology Officer for Boston Medical Center, where he was responsible for all aspects of IT.

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Tatiana Blank is Chief Financial Officer (CFO) of Eden Housing, Inc. As CFO, Tatiana is responsible for property management, corporate and real estate development accounting, finance and asset management, of Eden Housing, its affiliates and ownership entities. Prior to transitioning to this role, Tatiana was Eden's Vice President of Portfolio Finance and Asset Management, in which she ensured that all properties within Eden Housing's portfolio maintain a strong financial position, comply with all contractual, regulatory, and statutory requirements, and full all internal and external reporting requirements in an accurate and timely manner.

She brings more than 20 years of real estate finance and accounting experience, joining Eden's senior management team in 2016. Prior to joining Eden, Tatiana was the Vice President of Corporate Finance of ROEM Development Corporation, a for-profit real estate developer and general contractor, where she had worked since 2007. Previously, she also worked as a Tax and Audit Manager at Novogradac & Company, a public accounting firm specializing in tax credit financed affordable housing projects. She is a Certified Public Accountant.

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Amy Brisson is the Research Director in the Knowledge, Impact and Strategy Department at Enterprise Community Partners. With a background in journalism and community development research, Amy specializes in creating compelling data-driven stories and online tools. She is passionate about building the organization's capacity for data analysis and evidence-based decision-making. Her team conducts rigorous analyses of housing and community trends, develops rich multimedia data tools and dashboards, and powers Enterprise's ground-breaking Opportunity360 platform. Amy has worked in a variety of newsrooms and research organizations, including the Furman Center for Real Estate and Urban Policy. As a journalist, she's published award-winning articles covering issues of urban revitalization, environmental justice, and politics. She holds a Masters in Urban Planning from the NYU's Robert F. Wagner School of Public Service.

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Michelle Bush, President/CEO is 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.

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Donald Butler joined Homeport in June 2015 and is currently the Real Estate Controller & Director of Risk Management. He works closely with Real Estate Development, Asset Management, oversees the management of the Homeport administration building, supervises the IT department and assists all departments with data management and reporting. Don currently is responsible for identifying new strategic partners and funding sources, along with the disposition of real estate holdings. He is an accomplished senior executive with over 30 years of diverse experience in corporate and real estate finance, accounting, and financial reporting. His previous positions include Controller, Senior Vice President of Finance, and Chief Risk Officer at Redwood Development overseeing over 4,000 units of multi-family housing. Don holds a BSBA in Accounting from The Ohio State University and is a Certified Public Accountant.

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William J. Bynum is CEO at Hope Enterprise Corporation, Hope Credit Union and Hope Policy Institute. For more than three decades, Bill has worked to advance economic opportunity for disenfranchised populations. He began his career in North Carolina by establishing nationally recognized programs at Self-Help and at the NC Rural Economic Development Center. In 1994, Bill moved to Mississippi to become the founding CEO of the Enterprise Corporation of the Delta, and in 1995 organized Hope Community Credit Union.

Today, HOPE (Hope Enterprise Corporation, Hope Credit Union and Hope Policy Institute), is a family of organizations that provides financial services; leverages resources; and engages in policy analysis to strengthen communities, build assets, and improve lives in Alabama, Arkansas, Louisiana, Mississippi and Tennessee. Since 1994, HOPE has generated more than \$2.5 billion in financing that has benefitted more than one million people in one of the nation's most impoverished regions.

Bill serves on the boards of the Aspen Institute, NAACP Legal Defense Fund, Prosperity Now, and William Winter Institute for Racial Reconciliation. Bill previously chaired the Consumer Financial Protection Bureau Consumer Advisory Board and the Treasury Department's Community Development Advisory Board, and served as a member of the US Partnership on Mobility from Poverty. A recipient of the University of North Carolina Distinguished Alumnus Award, Bill and HOPE have been honored with the John P. McNulty Prize (Aspen Global Leadership Network), Ned Gramlich Award for Responsible Finance (Opportunity Finance Network), Annie Vamper Award (National Federation of Community Development Credit Unions), Herb Wegner Award (National Credit Union Foundation), National Entrepreneur of the Year (Ernst & Young/Kauffman Foundation), Rural Hero Award (National Rural Assembly), Pete Crear Lifetime Achievement Award (African American Credit Union Coalition) and The Wall St. Journal/Met Life Foundation Financial Inclusion Challenge.

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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 \$900 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 over 1,000 housing; primarily single-family assets. This real estate activity totals more than \$250 million of investment in primarily low- and moderate-income communities throughout New Jersey, Florida, and New York.

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.

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David Davenport is Sharedholder at Winthrop & Weinstine. David's legal practice is focused on representing Low Income Housing Tax Credit real estate developers who are working through year-15 issues with their investor limited partners. He has been a trial lawyer at Winthrop & Weinstine since 2001 and, since 2013, has been on the forefront in litigating complex year-15 disputes across the country in cases involving non-profit rights of first refusal, purchase option disputes, option price disputes, removal efforts, refinance challenges and many other year-15 related issues. He is a regular speaker and author on year-15 topics.

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John Dillow is Chief Financial Officer with Eastern Eight Community Development Corporation. He moved to Northeast Tennessee in 1987 to attend East Tennessee State University. After graduating with a Bachelor of Business Administration, John began his career serving multiple business functions within the organizations he worked for. Over thirty years of work experience has led John into many dimensions of a business operation. Diverse responsibility has enabled him to understand the integrations of business functions and the importance of their inter-dependency among the various departments within an organization. Serving the affordable housing community is the primary mission which gives John great pleasure. When Eastern Eight CDC clients can secure their housing needs, John enjoys listening to the excitement in their voices and seeing their expression of pride. His hobbies include playing chess, spending time with his family, walking and watching most sporting events. John enjoys spending time with his wife every day, playing with his dogs, and grilling on the weekends. John is truly blessed in both his personal and professional lives. His favorite quotes are "if you find yourself in a hole...stop digging" and "you cannot talk your way out of something you have behaved yourself into." Just food for thought.

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Art Fatum, as President IBP Associates, LLC, consults with a number of companies regarding operating efficiency, governance, reporting, and other key activities. He recently retired as CFO since 2013 of MidPen Housing Corporation, one of the nation's leading provider and manager of affordable housing. His career began at GE culminating as co-Managing Director of GE Capital's European leveraged buy-out business. From there he was CFO of Dun & Bradstreet's business information group, then President of AT&T Capital's \$1B European equipment leasing business. Subsequently he was CFO of two public companies in manufacturing and internet media, President of CNET International, and then COO and CFO of a San Francisco-based media company. Some 13 years ago he shifted his focus to non-profit and joined a national CDFI (Low Income Investment Fund or LIIF) as CFO for seven years before moving to MidPen Housing. He currently sits on two non-profit boards and has served on a public company board in the past.

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Frances Ferguson is Vice President (acting), 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 170,000 units. 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 nonprofit corporation, which supports affordable housing and community development across the county, 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.

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Angela Gravely-Smith is a Senior Manager with the National Real Estate Programs team at NeighborWorks America. Her responsibilities include peer learning and technical assistance to support sustainable business practices and enterprise-level growth. Prior to joining NeighborWorks, 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 of 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 public administration from the University of North Carolina at Chapel Hill, a master’s degree in city planning from Georgia Institute of Technology, and a bachelor’s degree in mass media arts from Clark Atlanta University.

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Julie Goldfine is Chief Financial and Operating Officer at Mutual Housing California. Julie has lent a progressive perspective to the raw numbers of the accounting profession during her 20 years of work on behalf of private and nonprofit organizations. She was named the 2018 CFO of the year in the nonprofit sector by the Sacramento Business Journal. She has spent more than half of her career in the low-income tax credit financing field, gaining a breadth of understanding in working out bond financing, loan conversions, cost certifications, and the evaluations of the financial feasibility of Section 42 projects. At Mutual Housing, Julie oversees accounting, asset management, and information technology. Prior to joining Mutual Housing, she worked for eight years at St. Anton Partners, LLC, as the company’s Chief Financial Officer/COO. She also previously served as the accounting manager for Parker Development Company, a land developer, homebuilder and property management company. Julie has helped companies establish policies and procedures, set up accounting systems, implement financial reporting processes and streamline operations. She started her career in public accounting working for local CPA firms. She obtained her CPA license in 1998. Julie has a Bachelor of Accountancy from the University of San Diego.

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Bill Goldsmith, Vice-President at Home Partners of America, has been in the affordable housing and community development industry for over 30 years. At Home Partners of America his focus is on building and training a nationwide network of real estate agents and brokerages, Choice Lease: LMI Lease Purchase and resident support initiatives.

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Brandon Gumm is Solutions Architect for mySidewalk. After several years working to build communities from the ground up both at the local and regional level, Brandon now builds tools with communities needed to track, analyze, and communicate their performance and impact. Here at mySidewalk, Brandon uses its platform to design, implement, and test intelligence tools for performance management, planning, public safety, economic development and more. Brandon graduated with a Master's Degree in Urban Sustainability and Resilience from Xavier University 2016. He continues to work toward strengthening communities every day.

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Robin Hacke is Executive Director of the Center for Community Investment (CCI), which is dedicated to overcoming disinvestment and improving opportunity so that everyone has a fair chance to lead a healthy and productive life. Working with cross-sector partnerships, innovative health institutions and local leaders, CCI helps communities unlock the capital they need to become more cohesive, resilient and environmentally sustainable.

CCI, housed at the Lincoln Institute of Land Policy, was incubated during Robin's tenure as a Senior Fellow at The Kresge Foundation. Previously, she served for seven years as Director of Capital Innovation at Living Cities, where she managed capital deployment for the \$80 million Integration Initiative and spearheaded creation of the Catalyst Fund. She has served as a Visiting Scholar at the Federal Reserve Bank of San Francisco, a consultant to major foundations and a member of the Steering Committee for the Federal Reserve Bank of Boston's Working Cities Challenge.

A former venture capitalist and investment banker with more than a decade of community investment experience, Robin holds an MBA from Harvard Business School and a BA from Harvard-Radcliffe College. Learn more at www.centerforcommunityinvestment.org.

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Stephen Hardy is CEO at mySidewalk. As a city planner turned technologist Stephen leads the mySidewalk team. In 2016, Stephen spearheaded mySidewalk's participation in The Opportunity Project, a White House initiative promoting accessible, actionable data for everyone—something Stephen firmly believes in. Before mySidewalk, Stephen launched the city planning practice at BNIM (2011 AIA firm of the year) and developed the sustainable community planning model that made him a highly sought expert for cities rebuilding after disasters. He has also worked for Senator Jerry Moran and The Conservation Fund. Stephen is certified by the American Institute of Certified Planners and is a graduate of Harvard's Graduate School of Design.

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Matthew D. Hjelmhaug is Chief Financial Officer at NeighborWorks Community Partners. Matt is responsible for all financial activities related to the seven Affiliate Organizations in Western New York, including two Affordable Housing Entities across Buffalo, Rochester and Niagara Falls. Matt oversees an Accounting staff of three between three separate offices and is responsible for financial oversight of diverse business lines including lending, loan servicing, property management, grant management, homebuyer education and residential rehab.

Matt was the Co-CEO (Interim) of NeighborWorks Community Partners, handling the dual roles of Co-CEO while continuing CFO duties. In this position, Matt was executive lead with board of directors. He created new personnel policies, employee handbook and performance review structure, partnered with Board of Directors to hire new CEO and Buffalo Executive Director, and established and led a Reporting Committee to produce new performance reports for all lines of business and locations.

Prior to becoming CFO at NeighborWorks Community Partners, Matt was Finance Director at NeighborWorks Rochester. In this position, Matt was responsible for all financial activities related to the organization, and financial oversight of business lines including: Residential lending, loan servicing, Residential Energy Services program, and Home Buyer program.

Matt is also a Property Management Owner/Manager, successfully marketing and maintaining four residential rental units in the City of Rochester. Matt earned a B.S. in Economics (Finance Focus) from Rochester Institute of Technology.

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Cindy Holler, President and Chief Executive Officer of Atlanta-based Community Housing Capital, brings 30+ years of strong leadership qualities and extensive experience to the housing and community development field. She has deep experience in capital aggregation, real estate lending, and real estate development in both the non-profit and for-profit sector with organizations that include Mercy Housing, Fannie Mae and South Shore Bank. In these roles, she has overseen the development of over 7,500 units of housing, making significant impact in local neighborhoods and regional markets.

Community Housing Capital (CHC) is certified as a community development financial institution (CDFI) and a community development entity (CDE) by the U.S. Treasury's CDFI Fund. As a national CDFI, CHC aggregates loan capital to finance the creation and preservation of affordable housing. To fulfill its mission, CHC provides predevelopment, acquisition, construction, and permanent multifamily and single-family loans, directly and exclusively, to the high-performing, nonprofit developers of the NeighborWorks® network. CHC has originated 462 loans totaling \$729 million to 142 NeighborWorks organizations in 43 states plus the District of Columbia, financing 18,768 units of affordable housing and facilitating more than \$2.3 billion in real estate development.

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Caroline Horton is Chief Financial Officer at Aeon. Caroline joined Aeon in 1998, where she oversees Aeon's finance and accounting functions and for the past 15 years, was also responsible for asset management. In her role, Caroline has been instrumental in managing Aeon's past and continued growth and building its financial position.

Caroline is also an active leader in the nonprofit affordable housing industry. 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. She is on the board of directors of NeighborWorks Capital, a lender to the NeighborWorks network. Caroline also presents on a variety of conference panels, using her skills and knowledge wherever she can to improve not just the work of Aeon, but to all organizations in the industry. Caroline earned her BSBA in accounting from Boston University School of Management. She was recognized as one of the Top Women in Finance by Finance & Commerce.

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Brian Kay, CFO of 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 of CHW's internal real estate acquisition and predevelopment fund to over \$25 million. Before joining CHW in 2012, career highlights include leadership positions within several diverse San Diego organizations. Brian holds a BA in Economics and Business from Westmont College in Santa Barbara, CA.

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Karen Kent is a Certified Public Accountant and a Partner with Kevin P. Martin & Associates, P.C., a CPA and business consulting firm specializing in not-for-profit and affordable housing. Karen holds a B.S. in Accountancy from Bridgewater State College graduating Magna Cum Laude.

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, 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 the Firm's Director of Quality Control where she also serves as Director of the Firm's Not-for-Profit Practice Group. Karen is a member of the Massachusetts Society of Certified Public Accountants Peer Review Committee, a member of BKR International Not-for-Profit Practice Group and Affordable Housing Practice Group, a board member and Treasurer of the Esophageal Cancer Awareness Association and is a board member and Treasurer of the House of Possibilities.

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Jonathan Klein retired from full time legal work at the end of 2018 after six years as General Counsel and Senior Vice President of The Community Builders, Inc., a leading nonprofit affordable housing developer and owner with projects in the Midwest, Northeast and Mid-Atlantic regions of the United States. At TCB Jonathan led a legal team of five lawyers and two paralegals representing TCB and its affiliates in all aspects of complex real estate and housing development transactions. His expertise includes Low-Income Housing Tax Credits, New Markets Tax Credits, and tax-exempt bonds; all types of local, state and federal subsidy programs for affordable housing; zoning, title and real estate conveyancing; condominiums and cooperatives; residential and commercial leasing; limited partnerships and limited liability companies; and closing on multilayered financings with public and private lenders and investors.

Before joining TCB, Jonathan was a founding partner of Klein Hornig LLP, a 35 lawyer firm based in Boston and Washington, DC focusing exclusively on affordable housing and community development transactions. He received his Juris Doctor degree *magna cum laude* from the University of Michigan Law School and is a member of the Massachusetts bar. He also received a Bachelor of General Studies degree with high honors from University of Michigan College of Literature Science and the Arts.

Jonathan continues to work for select affordable housing clients on a *pro bono* basis, and serves on several boards, including the Town of Brookline Housing Advisory Board, the Jewish Alliance for Law and Social Action, and the Jewish Community Relations Council of Greater Boston.

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Ron Kowal is the Vice-President of Housing Development and Asset Management for Austin Affordable Housing Corporation (AAHC), a subsidiary of the Housing Authority of the City of Austin (HACA). He is responsible for the day-to-day management of multifamily and commercial assets including marketing, risk management, accounting, and merchandising of a portfolio of 3,750 affordable multifamily acquisition units and 3,000 new construction units, as well as 150,000 square feet of office space and 88,800 square feet of retail space. Ron also oversees HACA's financial literacy and homeownership programs, including a successful down payment assistance program for public housing and Section 8 residents. Leading the charge in pursuing HUD RAD (Rental Assistance Demonstration) funds for HACA's public housing portfolio, Ron also recently secured through public/private partnerships deals totaling 1500 additional affordable housing units for AAHC and continuously seeks such opportunities. A real estate professional for the past 30 years, Ron received his Real Estate License in 1985, Broker's License in 1987, and HUD and RTC Certifications in 1990. He has a BA in Management with a focus in Finance and Accounting from Texas A&M University, is an avid sports fan and the proud father of three children.

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Gayle H. Lacroix is a Certified Public Accountant and the Chief Financial Officer of Roxbury Tenants of Harvard, an 1100 unit affordable housing campus located in the medical district of Boston.

Prior to joining RTH, Gayle served Chief Financial Officer of Madison Park Development Corporation, another Boston based affordable housing developer for over 10 years and spent 15 years with Ernst and Young, specializing in the Real Estate sector during her last five years.

Gayle currently serves as a member of the Strength Matters CFO working group. As a member of the group, Gayle has participated in the development of numerous financial white papers documenting financial industry practices. She has developed webinars with the content of those papers and has delivered them to a national audience. She currently participates as a developer and presenter of a two-day boot camp on the life of a real estate development project using Low Income Housing Tax Credits. She is developing individual courses from the topics presented in the boot camp that offer more in-depth study for the StrengthMatters initiative.

Gayle has taught courses on financial statement analysis and best practices in financial reporting on behalf of Mass Housing Partners, NeighborWorks America and Housing Partnership Network and the Massachusetts Home Funders Consortium.

Gayle earned her B.S. in Accountancy from Boston College graduating Cum Laude.

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Beth Lipson, Treasurer, joined OFN in 1997 and currently serves as Treasurer, where she is responsible for managing OFN's Finance and Accounting team and OFN's Development team. She is responsible for OFN's capital, finances and budgets, compliance, grants, and risk management. In her 20+ year tenure, Beth has worked on OFN's Financial Services team for nine years and worked as the CFO for 5 years. She also created the role of EVP, Strategic Initiatives in 2012 working to develop and execute key cross-functional industry initiatives, including the NEXT Awards and Create Jobs for US. Beth also serves on OFN's Investment Committee. Beth has a MBA from the Wharton School and a BA from University of Pennsylvania, and her previous work experiences include valuing businesses at Coopers and Lybrand and researching trends in savings and loans at the Federal Reserve Board.

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Kathy Long-Pence is the Chief Financial Officer at Self-Help Enterprises (SHE) and is responsible for the oversight of all financial aspects of the organization and subsidiaries. She is responsible for the management of the annual audit and prepares the annual consolidated financial statements of the organization under the oversight of the SHE Audit Committee. She also serves as Treasurer, Secretary, Risk Manager and Anti-Money Laundering Compliance Officer. Prior to joining SHE eight years ago Kathy worked for various profit, non-profit and governmental organizations for over 30 years. She is a Certified Public Accountant since 1990 and has earned both her Bachelor's and Master's degrees from California State University, Fresno, where she also taught seven years as adjunct faculty.

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Sharon Lorden, CPA has been the Chief Financial Officer and VP of Finance/Administration for DHIC, Inc. in Raleigh, North Carolina for the past 17 years. She has overseen the Finance and Asset Management during the growth of the portfolio from 750 units across 18 affordable apartment communities to nearly 2800 units across 45 communities. Prior to joining DHIC, Sharon worked for 8 years in Finance, Accounting and Acquisitions for several local commercial real estate development companies. Originally from Canton, Ohio, Sharon earned a dual Bachelor of Science in Accounting and Bachelor of Science in Business Administration/Finance from the University of Akron. She also holds a N.C. Real Estate Brokers license and has been a licensed CPA in North Carolina since 1998.

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Jo Ellen McNamara is the National Housing+Health Growth Lead with in the UnitedHealthcare Clinical Redesign Team (CRT). CRT is a national specialty work group within UnitedHealthcare focused on addressing Social Determinants of Health. Her work includes establishing financial and programmatic relationships with housing organizations to support UnitedHealthcare members who are homeless, medically vulnerable, and disconnected from community and family resources.

Jo Ellen joined UnitedHealthcare in July of 2016, and immediately began building partnerships across the country currently representing over 300 units of housing and intensive wrap around services. She provides expertise related to non-profit organization management and affordable housing partnerships (financing, operations, and leadership structure), HUD financing and initiatives, fair housing, and business analytics.

Prior to her work with UnitedHealthcare, Jo Ellen spent more than 20 years in community development and affordable housing work including health integrated Community Development Corporations. She also served as a management team member for one of Arizona's largest behavioral health and affordable housing development organizations. Her specialties include operations for youth transitional housing, affordable housing finance (LIHTC, HP program, traditional finance), HUD programs/finance, and integration of partnerships with foundations and non traditional funders.

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Mark M. Mancuso, Finance Director at Housing Resources of Western Colorado, graduated from Brigham Young University with a B.S. in Accounting in 1983 and a Master of Health Administration in 1986. Mark spent nearly 30 years in the health care sector in various financial and operational management positions, including three years as a Medical Service Corps officer in the U.S. Air Force, nine years as the Director of Finance for a system of primary care physician practices (one of which was a federally funded community health center), and more than 11 years as the Director of the Department of Surgery at a 526-bed teaching hospital. Mark's time with the federally funded health center together with his stint as CFO for a Federally Qualified Health Center prepared him well for my Finance Director role with Housing Resources of Western Colorado. This resulted from managing the budgeting and financial reporting for not-for-profits that received revenue and funding from multiple private and governmental sources and working with community boards responsible from a fiduciary standpoint for the ongoing viability of their respective organizations.

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Dawn Mathwig, Division Vice President, Camden Property Trust, is responsible for overseeing all facets of property operations, which includes 24 communities with more than 9,352 multifamily apartment homes and 211 employees in the Dallas and Austin markets.

Dawn joined Camden in 1992 as a Community Manager. During her twenty seven years of employment with Camden, her positions included Senior Community Manager, subject matter expert for Camden's OneSite Design and Implementation Team, District Manager, Regional Vice President and Division Vice President. Dawn has served as liaison for support departments in the design, piloting and implementation of new companywide initiatives including RUBS, OpsTechnology, OneSite, Yieldstar, Crossfire, Oracle and others.

Throughout her tenure at Camden, Dawn has been dedicated to Camden's culture, values, mission statement, and key operating strategies. She is a creative problem solver who focuses on bottom line results, the development of people and thrives on being a change leader throughout the organization.

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Racheal Meiers, Lead, Economic Opportunity and Impact Investing, drives partnerships to promote economic inclusion and community health to help make Kaiser Permanente served communities the healthiest in the nation. As part of these efforts, Racheal manages the Thriving Communities Fund, Kaiser Permanente's \$200M investment commitment to supporting housing stability and equitable community development. Racheal also leads other cross-functional partnerships related to impact hiring, small business capacity building, and community impact-related innovations in Kaiser Permanente facilities planning and construction.

Prior to joining Kaiser Permanente, Racheal worked at the nonprofit firm BSR, helping the world's largest companies improve their impacts on and partnerships with communities in their supply chains and operations. While at BSR, she directed and scaled HERproject, a global women's empowerment initiative. Since 2007, HERproject has reached over 850,000 women in global supply chains – in factories, flower farms, textile mills, and tea plantations – to improve their knowledge, access, and confidence vis-à-vis their health, financial future, and freedom from gender-based-violence.

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Terry E. Mitchell is President of Momark Development L.L.C. based in Austin, TX (www.momarkdevelopment.com). Terry is heavily involved in the planning and development of various residential and mixed-use real estate developments involving approximately 6,500 residential units and related mixed-uses. Past and present projects include The Tyndall at Robertson Hill, the redevelopment of the RBJ Center, The Austonian (development consultant and marketing manager), the Denizen, Plum Creek, Chestnut Commons, Edgewick, Gabardine, Macmora Cottages and The Sanctuary Lofts. Mr. Mitchell's focus is largely set upon urban residential or mixed-use projects that create unique communities offering extraordinary lifestyles. Prior to his arrival at Momark, Mr. Mitchell served in a number of management positions including as Vice President of Milburn Homes (D.R. Horton, Inc. division). In his 20-plus years in real estate, Mr. Mitchell has developed over 20,000 residential units and over \$3 billion in residential community value. Mr. Mitchell received his Bachelors of Business Administration from the University of Texas in Austin. He also received his Masters of Business Administration from Saint Edward's University and his Doctor of Jurisprudence from Saint Mary's University in San Antonio. Terry is involved in various charitable and civic activities.

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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.

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Jennifer Mullaney, CPA is Contoller at Ohio Capital Corporation (OCCH) and Chief Financial Officer at Ohio Capital Finance Corporation (OCFC). Jennifer joined OCCH in December 2006. Her responsibilities include overseeing the financial preparation and reporting for OCFC and its affiliates, Ohio Capital Impact Corporation as well as the Ohio Equity Funds. This includes quarterly investor reporting and the annual audit and tax return reviews of entities contained in each Fund. She also oversees the partnership cash reserves and provides technical tax and accounting assistance to other departments. Prior to joining OCCH, Jennifer was the Chief Financial Officer at Community Properties of Ohio Management Services (CPO), a wholly owned subsidiary of Ohio Capital Corporation. Prior to CPO, she worked for Larry C. Stemen, CPA and Associates as an Audit Manager specializing in HUD and LIHTC audits and cost certifications. Jennifer holds her Bachelor's Degree from Wittenberg University and is a Certified Public Accountant.

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Beth Mullen, CPA, is the National Director of the Firm's Affordable Housing Industry Practice and a member of the Project Finance and Consulting team. She has more than 30 years of experience providing consulting, tax, and accounting services to real estate owners, developers and investors. A significant portion of Beth's time is devoted to helping clients to facilitate transactions by structuring public/private partnerships that are financed in part by Low-Income Housing Tax Credit, the federal and state historic tax credit programs, opportunity zone equity, the federal New Markets Tax Credit Program, and energy tax credits.

Beth teaches internal and external courses on these tax programs and has published articles in numerous trade publications. Her extensive knowledge of partnership tax law has been invaluable in resolving allocation, at-risk, exit tax, residual value, and other common partnership problems.

Education: Harvard University: Bachelor of Science, Economics, *cum laude*. Professional Affiliations: American Institute of Certified Public Accountants; Maryland Association of Certified Public Accountants; and, California Society of Certified Public Accountants.

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Brittney Murphy joined Fahe as Controller in 2011. She was promoted to her current position as CFO in 2014. Her expertise in financial analysis and planning supports Fahe's Network of 50+ nonprofit Member organizations striving to build economies that work in Appalachia. Brittney supports local leaders on-the-ground in the region by providing training and support that moves small nonprofits toward sustainable financial positions that allow them to expand services and innovate. She recently launched the virtual CFO program, which gives Members direct access to financial expertise, and she conducts national-level trainings. Under Brittney's leadership, Fahe successfully implemented the CDFI Bond Guarantee program. She is an expert in federal funding and compliance, and holds in-depth knowledge of financial analysis for managerial decision-making. She leads Fahe's budget and goals process toward the successful completion of the Strategic Plan. Brittney oversees daily operations of the Finance and Human Resources departments and is responsible for internal and external reporting. Prior to joining Fahe, Brittney conducted audits of nonprofits and governments. She obtained her CPA certification in 2011 and holds a Bachelor of Science from Campbellsville University.

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Kevin Myren is the Chief Financial Officer and Vice President of Administration at CommonBond Communities. He has been in this position nine and a half years. He oversees the finance, accounting, investing, risk management, human resources, office management and information technology functions of the organization. He is temporarily responsible for oversight of the property management function of CommonBond as well.

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Harold Nassau is NeighborWorks® America's Senior Director of Asset Management Programs. For the past nineteen years Harold has overseen asset management training and technical assistance for one hundred thirty-five local NeighborWorks organizations that own 145,000 units of multifamily housing. In 2005, Harold designed and launched Neighborhood Risk Management Corp. Harold is President of the Consortium of Housing and Asset Management (CHAM®) and, of course, holds the CHAM® designation as a professional asset manager of affordable housing. Harold has also developed loan and insurance programs for affordable housing.

During the five years prior to joining NeighborWorks®America, Harold was the Asset Manager for a Boston based regional nonprofit that developed 2000 units of affordable in partnership with 12 different CDCs. In this capacity he also developed a loan program for 5-20 unit buildings and an insurance program for affordable housing.

Before entering the world of non-profits and intermediaries, Harold had fifteen years' experience in the for-profit world as a property manager, Director of Property Management and as the owner of a management company. Portfolios included rental housing, condominiums, co-ops and commercial real estate. Additionally, he has developed rental housing.

Harold currently serves on Board committees for asset management of two Boston CDCs. "Asset Management and the Survival of Non Profit Owners" was published in [Affordable Housing Finance](#) in May, 2015.

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Randy Parker is POAH's Managing Director, Chief Financial Officer. He serves as POAH's senior finance leader and principal financial strategist. He works closely with the senior team and POAH's board to develop and implement financial policies to help establish the strategic direction of the organization.

Randy is responsible for coordinating budgets and monitoring the execution of the budget in relation to organization performance and maintains POAH's lender, banking, investor, and foundation relationships.

He works closely with POAH's development, acquisitions, asset management, property management, and community impact functions to assure that financial risks are considered and appropriately addressed. He also oversees POAH's human resources function, including compensation, benefits, benchmarking and negotiation of company benefits.

Randy has more than 30 years of experience in the private real estate sector and has held senior positions at Beacon Capital Partners, TA Associates Realty and the non-profit Housing Partnership Network. He has experience in a variety of organizations, ranging from on-the-ground architectural and development work to real estate investment to asset and portfolio management.

Randy hold a bachelor's degree in Architecture from the University of Kentucky and an MBA from The Wharton School at University of Pennsylvania.

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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.

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Andrea R. Ponsor is *Chief Operating Officer/Executive Vice President – Policy at Stewards of Affordable Housing for the Future (SAHF)*. Andrea leads policy efforts for Stewards of Affordable Housing for the Future, working 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.

Andrea has over 15 years of experience in the field of housing and community development and joined SAHF as Executive Vice President in 2016. SAHF's policy efforts promote efficient use of limited resources that support improved health, opportunity, and quality of life for low-income seniors, families, and disabled residents and more efficient use of energy and water in our members' properties.

Prior to joining SAHF, Andrea served as 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, where she represented lenders, developers and management agents in affordable housing transactions and policy matters.

Andrea began her career as an attorney with the U.S. Department of Housing and Urban Development in Atlanta, GA where she focused on multifamily mortgage closings, property disposition, program enforcement and fair housing.

Andrea holds a Juris Doctor degree from the University of Florida College of Law and a Bachelor's degree in Economics from Tulane University.

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Noel Andrés Poyo serves as NALCAB's Executive Director and CEO of NALCAB's subsidiary asset management company *Escalera* Community Investments. Noel's twenty-year professional career has focused on integrating low-income people and immigrants into mainstream financial services and real estate sectors of our economy as well as improving the livability and economic resilience of low-income neighborhoods and affordable housing communities.

As Executive Director of NALCAB, and previously as a private sector consultant, Noel has raised more than \$300 million in private and federal investments for socially-motivated real estate and economic development projects and he has played diverse roles in the implementation of real estate projects valued over \$1 billion. Noel advises the executive leadership of JPMC Bank, BBVA Compass Bank and Capital One Bank as a member of their respective Advisory Councils. He serves on the Board of Directors of the Center for Responsible Lending, the nation's leading research and advocacy organization focused on combating predatory lending. From 2015-2017, Noel advised Chair Yellen and the Board of Governors of the Federal Reserve as one of fifteen members of the Fed's Community Advisory Council.

A graduate of Yale University, Noel is bicultural and bilingual. He is a proud husband and father of three girls.

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Rohan Puri is the Head of Data Analytics at Home Partners America. He joined Home Partners in 2013 and has been instrumental in its growth from a small start up to a 4 billion dollar operating company with approximately 200 employees. His primary responsibilities have ranged from launching the first map based search engine on its website, leading its first securitization diligence process, and running corporate models used for private placement processes. Currently, Rohan leads a team of 10 individuals that are responsible for key business strategy and decision making, leveraging technology and data science. He graduated with a double major in Computer Science and Economics from the University of Chicago.

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Jeffrey Reed, president, has been with Community Housing Partners (CHP) for 20 years and has 30 years of experience in financial and corporate management. As president, he oversees all operations of the company. He also is responsible for business planning and organizational development, external relationship development, policy, and risk management. Prior to becoming president in 2017, Jeffrey served as chief financial officer (CFO), where he had oversight of accounting, asset management, multi-family development, construction, architecture and financial management for CHP, which controls over \$500 million in assets with annual revenues of over \$81 million. As CFO at CHP, he was responsible for corporate financing, cash flow projections, cash management, profitability analysis and budget oversight for over 150 legal entities. Jeffrey's duties also included financial compliance, risk management and acquisition/project feasibility analysis. He currently serves on the boards of NeighborWorks Capital as the Finance and Audit Committee's chair, Stewards of Affordable Housing for the Future (SAHF) as the Finance and Audit Committee's chair and the Generations Captive Group. Jeffrey holds a Bachelor's of Business Administration in Accounting from Radford University and is a certified housing asset manager (CHAM).

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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.

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Alvin L. Saafir is the Senior Vice President and Chief Credit Officer for Community Housing Capital where he is responsible for the management of credit underwriting, borrower compliance, portfolio management and credit risk management.

Prior to Community Housing Capital, Alvin spent the majority of his finance career as a Vice President and Senior Lender in the Community Development Lending department of KeyBank National Association for Northern Ohio and Michigan.

Alvin began his banking career in 1988 as a Branch Manager with Ameritrust Bank. Between 1988 and 1994 he managed branches on both the east side and west side of Cleveland, Ohio and its surrounding suburbs. In 1994 he went to work with the Community Development Lending area of KeyBank. As a lender, he has served as a liaison to neighborhood groups, developers, city and state government officials on issues related to bank lending practices and the Community Reinvestment Act ("CRA"). Since 1994, he has assisted in the structure and implementation of banking products and programs, related to neighborhood-based community and economic development investments. He has originated and underwritten commercial real estate and commercial business loans with an emphasis on public/private partnerships, government participation, historic tax credits and low income housing tax credits (LIHTC).

He earned a Bachelor of Science in Business Administration with a concentration in Statistics from Bowling Green State University in Bowling Green, Ohio. He also holds a Masters of Business Administration from Baldwin-Wallace College in Berea, Ohio.

Alvin has received an array of certifications, which include the National Development Council's Community Development Lending Program. He is a former certified NXLevel training instructor. NxLevel is a program that works to train and develop start-up businesses, existing businesses, entrepreneurs, enterprising youth, micro-entrepreneurs, agricultural businesses and e-businesses. He has developed curriculums and taught courses on small business planning and cash flow analysis.

Alvin is a former member of the Cleveland Citywide Development Corporation loan review committee, a former member of the State of Ohio Minority Business Advisory Council (Ohio Governor appointment) and a member of Alpha Phi Alpha Fraternity, Inc.

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Valorie Schwarzmann joined Homeport in 2010 as its Chief Financial Officer after serving on its Board of Directors for three years, as its Treasurer. Her responsibilities include overseeing the financial systems, processes, planning, and reporting for all lines of business with special operational emphasis on Asset Management, Resident Services, and Financial Education Services. Valorie worked in public accounting for almost twenty years prior to joining Homeport. 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.

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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.

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Joshua Simon is the executive director of East Bay Asian Local Development Corporation (EBALDC), where he has worked for 18 of the last 25 years. His work has focused on creating opportunities for low income people. Examples include Swan’s Market, Lion Creek Crossings and Preservation Park. He is focused on combining mixed-income rental apartments with retail space and community facilities that support building healthy, vibrant, and safe neighborhoods.

Joshua holds a Bachelor of Arts in Architecture from the University of California, Berkeley and a Master of Science in Real Estate Development from the Massachusetts Institute of Technology.

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James Singleton III is POAH Communities’ Vice President of Training & Recruitment. He manages the recruitment process for all positions within POAH Communities, consults with managers in hiring decisions and provides source assistance to POAH. He also regularly assesses training and education needs and creates and develops learning experiences that will enhance the skills of POAH Communities employees.

James brings expertise in the employee development space and education strategies. In his prior position at C Space, a market research company, James oversaw several employee programs and customized training to respond to the company’s speed of business and staff’s learning interests.

James is a graduate of Oklahoma Baptist University and a Certified Professional Coach from World Coach Institute.

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Laura Shackelford, M.Ed. serves as the Director for the Career Connections Center at Texas Woman’s University, the largest university primarily for women in the United States. With more than 12 years of experience in higher education and human resources management and a passion for student success, Laura leads a team of 20 professional and part-time staff to cultivate a career culture at TWU. She previously worked for the University of North Texas (UNT) for nearly 4 years within the Career Center, serving in progressively higher-level roles in the department’s leadership team. While at UNT, she also oversaw Student Employment policies and procedures for 1,000 supervisors and more than 6,000 hourly student employees annually. Laura received her Master’s degree in Educational Leadership and Policy from the University of Utah and has a Bachelor of Arts in Psychology from Gonzaga University.

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E. Julia Shin is a vice president of innovation and managing director of impact investing for Enterprise Community Investment, 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 structurer at Citi where she provided 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 with focus on mergers and acquisitions, securities law and banking law. Julia received her Juris Doctor and Master of Arts in economics from the University of Chicago and received her undergraduate degrees from MIT.

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Rodney Sommers is a principal in the Dover, Ohio, office of Novogradac & Company LLP. Rodney has more than 25 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 including those subject to government auditing standards and Uniform Administration Requirements, Cost Principles and Audit Requirements of Federal Awards. He graduated from Kent State University and is a member of the American Institute of Certified Public Accountants. Rodney is licensed in Ohio as a certified public accountant.

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Celia Smoot has nearly 20 years of experience in the affordable housing with an expertise focus in finance and regulatory compliance. She is currently a Vice President at National Affordable Housing Trust focused on various duties including providing technical support to nonprofit organizations and managing Y15 dispositions. Previously, she served as Director of LISC Housing and managed a national team setting housing strategy and policy as well as structuring, raising capital and managing housing funds. An attorney, she has a strong background in affordable housing and community development real estate finance. She provides technical assistance to nonprofit entities managing and operating subsidized affordable multifamily housing. Celia has a real estate financing background, specializing in affordable housing and community development projects. Prior to joining LISC, she was an attorney with HUD, with Hessel, Aluise, and Neun, P.C., a private national law firm with an affordable housing focus, and with Kutak Rock, LLP, in their tax credit practice group. She received a J.D. from George Washington University and a B.A. from the University of North Carolina at Charlotte.

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David H. Steinwedell is a 35 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 CEO of Affordable Central Texas the sponsor and investment manager of the Austin Housing Conservancy Fund in Austin, TX. Over his career, David has completed over \$15 billion in transactions across all property types and as part of private equity funds, REITs and other investment vehicles. A graduate of Hamilton College, David has served on the boards of National Association of Real Estate Investment Managers (NAREIM), ULI Austin and Atlanta, The Trust for Public Land and the Tritt Foundation.

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Lance Sutherland has served in multiple positions at CHP that have involved him in all aspects and processes related to the company's complex and diverse accounting functions. He has more than 13 years of experience in the accounting field—including work in the defense and aerospace industry with ITT Corporation—where he gained expertise in financial planning and analysis, cost accounting, project accounting, and process development. At CHP, Lance is responsible for overseeing the accounting and financial operations of all business lines, as well as the support services functions of the organization. He holds a BS in Business Administration with a major in Accounting and an MBA from Radford University. Lance is licensed as a Certified Public Accountant (CPA) in the state of Virginia, and holds the Certified Housing Asset Manager (CHAM) designation.

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Janice Turner is Senior Vice President of Human Resources and Administration at Mercy Housing, Inc. based in Denver, CO. Her primary objective is to provide strategic leadership, including creating and implementing progressive people practices that drive outstanding business outcomes across 22 states for approximately 1600 employees. Janice has significant experience leading large diverse teams, serving as a Board/C-Suite advisor and creating comprehensive solution throughout the employee lifecycle in the utility, construction, education and telecommunications industries.

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Laura Vennard is CFO “Emeritus” for Strength Matters. Laura served as the Chief Financial Officer of Preservation of Affordable Housing, Inc. (POAH) from September 2002 until February 2017. She became a Managing Director of POAH in April of 2012.

POAH, founded in 2001, is a Not for Profit organization that develops acquires, renovates, manages and owns, as a long-term steward, rental properties that are at risk of being lost due to expiring affordability agreements POAH is also lead developer in long term neighborhood transformation projects in partnership with urban housing authorities.

In Laura’s tenure, POAH grew from a start-up organization to a national not for profit, operating in nine states and Washington DC. At December 2016 POAH controlled 9,000 units in 78 entities, with consolidated assets of \$925 million. As CFO, Laura was responsible for fiscal management, financial reporting, relationships with POAH’s funders and long term strategic financial planning for POAH and its operating subsidiaries. As CFO of POAH, Laura was a founding member of Strength Matters.

Prior to joining POAH, Laura spent over twenty years at Tucker Anthony, Inc., a Boston based investment banking firm. As Senior Vice President and Manager of that firm’s Direct Investment Group, she specialized in real estate equity syndication and tax-exempt housing finance. She was instrumental in placing over \$100 million in equity resulting in the creation of 1700 units of affordable housing. She also served as Treasurer and Vice President of Tucker Anthony Private Equity Capital and Treasurer of Tucker Anthony Resources, Inc.

From 1978 to 1981, Laura was an auditor in the Emerging Business Services Group of Coopers and Lybrand. She was a C.P.A. in the Commonwealth of Massachusetts. Laura received her B.A. from the State University of New York at Albany and holds an M.B.A from the Simmons School of Management in Boston.

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Chuck Wall joined Renaissance Community Loan Fund as Controller in October 2012. He was promoted to his current position as Chief Financial Officer in 2014. In this role, he manages the Finance Department and all aspects of Renaissance’s finances. He is responsible for accurate and timely financial reporting to management and Renaissance’s Board of Directors, coordinating the audit process, and will review all financials pertaining to assets obtained and managed in Renaissance’s programs. Chuck brings over 30 years of finance experience to Renaissance, including experience in financial reporting, operating and capital budgets, investment management, mergers and acquisition, and internal audit. Chuck received his B.S. in Accountancy from Eastern Illinois University and his M.B.A. in Finance from DePaul University. He is licensed as a CPA in Illinois and Mississippi.

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Caitlin O’Byrne Waters is Employee Benefits Consultant at CBIZ. Caitlin joined CBIZ in 2015, bringing her communications expertise to help employers communicate their benefits strategy to employees in a way that makes sense and clearly articulates the complicated, ever-changing insurance world. Prior to joining CBIZ, Caitlin worked at advertising/public relations firms with clients in the health insurance and financial services industry. Caitlin is passionate about helping her clients find customized solutions that fit the organization’s goals, whether it be uncovering some cost-savings or increasing employee engagement. With our recent war for talent, Caitlin understands the true value of building an inclusive benefits package that helps her clients attract and retain top talent.

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Judy Weber is Principal at *VIVA Consulting*. Judy's practice spans a wide array of affordable housing organizational, property and asset management initiatives, from helping organizations figure out their optimal operating strategies to conducting nationwide research and teaching best practices. She also counsels both federal and state sponsored initiatives seeking greater efficiencies and effectiveness in their affordable housing policies and/or legislation. She has held interim executive leadership positions during periods of significant transition and provides organizational and process design services to affordable housing organizations as well. She is a Certified Property Manager® and teaches regularly for the Institute of Real Estate Management (IREM). She co-developed and teaches curriculum for the Certified Housing Asset Management (CHAM) designation program (sponsored by NeighborWorks®, LISC and Enterprise Community Partners) and teaches its courses at NeighborWorks® national training conferences and in place-based settings across the country. See full resume on VIVA website at www.vivaconsult.com.

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Chuck Wehrwein is Chief Operating Officer at Housing Partnership Network. Chuck served as President of Member Engagement and Business Collaboration, where he managed some of the social enterprises, and the Information Systems, Operations, and Homeownership & Economic Mobility departments. He also served as a member of HPN's Executive Leadership Team and played a key role in managing collaboration among HPN programs and member-driven social enterprises.

Prior to Chuck's return to HPN, he spent 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, Chief Financial Officer of Thrush Development Company, 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. Chuck is also a certified public accountant.

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