Strength Matters Virtual Financial Management Conference 2020
Biographical Sketches

Leanne Agaman, CPA, is a director with CohnReznick Advisory who specializes in providing governance, risk, and compliance services to clients in public, private and not-for-profit organizations. Since joining the Firm more than 16 years ago, Leanne has managed numerous Sarbanes-Oxley, internal audit and risk assessment engagements for a variety of clients. Leanne has successfully designed, documented and evaluated internal control and risk management systems and has assisted clients in remediating control weaknesses and implementing process improvements.

Leanne is experienced in leading engagements for private and public companies as well as performing work for government agencies. She also specializes in providing best practice governance and internal audit services to not-for-profit organizations. Leanne has worked with clients such as United Jewish Appeal – Federation of Jewish Philanthropies of New York, Ladenburg Thalmann Financial Services, Metropolitan Jewish Health System, Drew University, New Jersey Infrastructure Bank, J.Crew, the Metropolitan Museum of Art and Cabrini of Westchester, to name but a few.

Leanne routinely makes presentations to Audit Committees and Boards where she provides updates on the status of internal audits, discusses key risks, offers insight on industry trends, and participates in discussions related to the client organization. She has played an instrumental role in managing the cultural change required in client organizations to meet regulatory requirements such as Sarbanes-Oxley or launch an internal audit function, and is well versed in developing the requisite processes and training programs to help manage that change.

As a director, Leanne is responsible for ensuring that the highest standards of quality are met on each client engagement. She provides the necessary training and support to the Governance, Risk, and Compliance Practice and to clients and other financial professionals on issues related to corporate governance best practices and internal audit.

leanne.agaman@cohnreznick.com

Leo Barrera, Construction Manager, joined cdcb (come dream. come build.) in 2009 and has a wide range of experience within the cdcb organization focusing on production and project management. Prior to being promoted to Construction Manager, he was the cdcb's Special Projects Lead where he managed the successful completion of the RAPIDO program. Leo acts as a liaison between cdcb's design professionals, contractors and the client. He prepares and manages all construction contract documents and vendor contracts. He oversees all bidding and procurement activity. He also reviews and manages all project budgets, billing and environmental clearances.

jbarrera@cdcb.org

Doug Bates is the Chief Financial Officer and Treasurer for NAHT and heads the Finance team. Doug joined NAHT in 2007 as Assistant Controller and has been instrumental in creating controls and efficiencies while promoting a sound financial structure. Until the Joint Venture with Low Income Investment Fund (LIIF), he was also the CFO of Stewards of Affordable Housing for the Future (SAHF), which was the sole member of NAHT.

Doug has over 20 years of experience in financial management, operations and the low income tax credit industry. Prior to joining NAHT, he served as Fund Accounting Manager for Paramount Financial Group and as Controller for Heritage Development Company. Doug is also a board member and treasurer for two not-for-profit organizations in the Columbus area.

Doug holds a B.S. in Accounting from Youngstown State University and earned his Masters of Business Administration from Mount Vernon Nazarene University.

dbates@naht.org

Brittany Besler, MBA, CPA, Esq. is a tax consulting attorney with AAFCPAs. Brittany possesses a unique combination of tax, legal, and business backgrounds, and is a valuable member of AAFCPAs' Tax practice. She provides tax planning, research, and compliance solutions for corporations, partnerships, nonprofits, individuals, estates & trusts.

Brittany advises businesses and individuals on various federal, state, local and foreign tax-related issues, including counseling clients on the consequences of new and updated tax laws. She assists clients in the creation of appropriate and optimal organizational structures and advises on tax planning and tax exemption compliance. She advises newly-formed and well-established nonprofit clients on meeting compliance requirements of various government agencies, including the IRS rules on fundraising and political activities.

Brittany evaluates information provided by the client and devises strategies to solve present financial issues and anticipates those that may arise. She executes on project-related tax research and analysis, performs tax basis calculations and other related tax studies, and evaluates and assesses risks associated with complicated tax problems or controversies.

Brittany is admitted to practice law in both Massachusetts and Wisconsin. Prior to AAFCPAs, Brittany was a consultant at national & regional law and CPA firms. She leads training programs for internal clients, regional & national industry associations, and team members. Most recently, she presented How to Maintain Nonprofit, Tax-Exempt, and Public Charity Status to nascent Massachusetts nonprofits in collaboration with Lawyers Clearinghouse.

Bbesler@aafcpa.com

Betsy Biemann serves as Chief Executive Officer of Coastal Enterprises Inc. (CEI), a mission-driven investor growing good jobs, environmentally sustainable businesses and more broadly shared prosperity across Maine and – through its subsidiaries – in rural regions nationally. Before joining CEI in 2016, Betsy led Growing Maine's Food Industry, Growing Maine, a project of the Mossavar-Rahmani Center for Business and Government at Harvard University, and consulted for several companies, foundations and nonprofits. From 2005-2012 she was President of the Maine Technology Institute, investing in companies and initiatives seeking to grow high-potential sectors of Maine's economy. Prior to her move to Maine, Betsy was an Associate Director at The Rockefeller Foundation, where she managed a national grant and investment portfolio aiming to increase employment in low-income communities. She joined Rockefeller in 1996 after working in international development, principally in sub-Saharan Africa.

Betsy serves on the boards of the Opportunity Finance Network, the New Growth Innovation Network and the Elmina B. Sewall Foundation. She earned her B.A. at Harvard University and her M.P.A. at Princeton University's School of International & Public Affairs. She lives in Brunswick with her husband and their two dogs.

Betsy.Biemann@ceimaine.org

Ruby Bolaria Shifrin is the Director of the Housing Affordability program at the Chan Zuckerberg Initiative (CZI). Prior to CZI, Ruby worked in real estate development as a project manager for multifamily mixed income projects in San Francisco and has experience in commercial real estate. She also worked internationally at the Housing Department in Johannesburg, South Africa where she managed an in-situ upgrading pilot project. She started her career as an organizer for environmental and social justice organizations like Earthjustice and Corporate Accountability International. Ruby has a strong commitment to equity and social justice and brings her unique mix of advocacy and technical experience to CZI's housing work. She holds a BA in Politics from the University of California, Santa Cruz and a Master of Urban and Regional Planning from the University of California, Los Angeles.

rbolaria@chanzuckerberg.com

Alan Branson is Executive Vice President and Chief Financial Officer for the Hope Enterprise Corporation and Hope Federal Credit Union (HOPE) with responsibility for the companies' Fiscal, Compliance, Information Technology, Data Analytics, and Business Lending activities. Alan previously worked as a commercial banker at Signet Bank serving small and medium-sized businesses, a consultant to the Microlending program at the North Carolina Rural Economic Development Center, a Research Associate at Harvard Business School, and a developer of extended-stay hotel properties. Branson earned a B.A. from Oral Roberts University, an MBA from the Kenan-Flagler School of Business at the University of North Carolina, and a PhD from Jackson State University. He has also completed the Southeastern School of Advanced Commercial Lending, the Venture Capital Institute, and additional coursework from the Commercial Finance Association. Alan serves on the boards of LISC Rural Advisory Committee, Community Advisory Board for Primary Care Development Corporations, Community Advisory Board for Mid-City CDE, and Credit Committee for Appalachian Community Capital.

Alan.Branson@hope-ec.org

Anjanette Brown, Chief Financial Officer joined The Resurrection Project (TRP) in June 2018 and oversees Accounting, Human Resources and Operations, TRP Lending, Asset Management, and Property Management. She facilitates financial strategy development by introducing disciplined thought processes and concrete implementation. She came to TRP from Neighborhood Housing Services of Chicago (NHS), a lending partner organization of TRP, where she was Chief Financial officer. Prior to NHS, she spent 14 years at Community Housing Partners, based in Virginia, focused on real estate development, housing services, and energy solutions. She is a graduate of the Pamplin College of Business at Virginia Tech, where she holds a BA in Accounting.

abrown@resurrectionproject.org

Sarah Brune serves as the Public Policy & Innovation Strategist at Neighborhood Housing Services of Chicago, where she oversees government relations, policy advocacy to address affordable housing issues, and strategic initiatives for the organization. Sarah is currently working on a broad policy initiative at NHS to address barriers to borrowers of color in the mortgage lending process. NHS is partnering with local, state, and national elected officials as well as financial institutions to address systemic inequities in lending and create new systems that increase access to homeownership for Black and Latinx borrowers across the country.

sbrune@NHSChicago.org

Dorrie Bryan is Senior Vice President of Operations at National Community Renaissance. Dorrie began her career with National Community Renaissance in 1995 as the Executive Assistant to our Founder and CEO. After graduating from the University of California Riverside Human Resources Certificate Program in 1999, Dorrie was promoted to Vice President of Human Resources and Operations. In her current role, she is responsible for planning, developing, implementing, administering, and budgeting for all areas of employment, compensation, benefits, training, employee relations, legal compliance, affirmative action, and health and safety programs, for National CORE's 400+ employees. Other professional affiliations include Professionals in Human Resources Association and the Society of Human Resources Management.

dbryan@nationalcore.org

Deborah Burkart is a national vice president of supportive housing at National Equity Fund, Inc. (NEF), a leading non-profit syndicator of low income housing tax credits. Since joining NEF in 1992, she has underwritten supportive housing and affordable assisted living investments for NEF's funds for a wide range of special needs populations.

During her over 25 years with NEF, Debbie has assisted in the acquisition and/or underwriting of more than $1 billion in tax credit equity for special-needs projects including more than 5,500 units of housing for homeless veterans in 15 states. In 2012, she founded and directs LISC-NEF's *Bring Them HOMES,* an initiative for homeless veterans, which has raised $8 million in predevelopment grant funding for veterans supportive housing projects. She's a nationally recognized expert on affordable seniors housing as well as supportive housing financing and policy, and speaks frequently at conferences. For nearly a decade, she has been a judge for the National Council of State Housing Agencies' Annual Awards for Program Excellence in the Special Needs category.

In 2008, she became a National Coalition for Homeless Veterans board member and in 2016 joined Corporation for Supportive Housing's (CSH) national board. She also sits on the boards of Brilliant Corners and LA Family Housing. Debbie received the Corporate Silver Star Award from Volunteers of America Illinois in 2016 and the Community Hero Award from New Directions in 2011 for her work in veterans supportive housing. In 2017, she was profiled by *Affordable Housing Finance* as one of ten women who have reached the top of the affordable housing industry.

dburkart@nefinc.org

Sherry Burton Sherry Burton is Vice President of Human Resources at the Housing Partnership Network (HPN) in Boston, MA. In her role, Sherry serves on the senior leadership team, formulates and implements HPN's Human Resources policies and programs, oversees all aspects of employee relations, talent management, compensation, and benefits. She supports the organization's racial equity, diversity and inclusion efforts. Sherry joined HPN in 2008.

burton@housingpartnership.net

Michelle Bush, President/CEO is the chief consultant and founder of Corporate F.A.C.T.S. Corporate F.A.C.T.S. is a strategic planning and financial services firm helping clients build strong, vibrant communities. Corporate F.A.C.T.S. specializes in strategic planning, community development investment planning, and building strong financial management systems.

Corporate F.A.C.T.S. has deep roots in the community development industry working across a broad spectrum of clients and projects. C-FACTS provides strategic planning, accounting and Chief Financial Officer services to the CDC industry. Michelle earned an MBA in Finance from Xavier University in Cincinnati, Ohio.

mbush@corporatefacts.net

Sean Callum has a 26-year career that spans various disciplines including urban economic development; commercial real estate development, investment and finance; banking and risk management. Sean is currently VP, Credit Risk Officer at First Republic Bank. He is responsible for ensuring that the bank stays within it credit risk appetite and worked closely with the Chief Risk Officer to build the Enterprise Risk Management for the bank.

Sean has been civically engaged for most of his adult life either as a mentor of young people or through numerous community service projects sponsored by the Rotary Club of Oakland #3 including development of affordable single family homes as the Rotary Home Building Committee Chair. Sean has served as a board member of the Oakland Rotary Club #3 and the Oakland Rotary Endowment Board of Trustees. Currently he is a board member of the Alameda-Oakland Community Action Partnership (AC-OCAP), which is a tripartite administering board charged with allocating community service block grant funds (CSBG) to local organizations fighting the war on poverty. Sean holds a bachelors of Economics from the University of California, Berkeley.

scallum@firstrepublic.com

Christopher Cherry is Wesley Housing's CFO, responsible for all accounting, asset management, payroll and administration functions of the company and its affiliates. He provides strategic financial analysis and budget oversight for all affiliates and subsidiaries of the Organization. He has served in a variety of capacities within the affordable housing industry for the past 18 years, following 17 years in public accounting. He is a member of several industry associations including Strength Matters® and The Housing Association of Nonprofit Developers (HAND) and sits on the Board of Directors of The Boys and Girls Club of Anne Arundel County. He is a certified public accountant, a member of the American Institute of Certified Public Accountants (AICPA) and holds a bachelor's degree in accounting from the University of Maryland.

ccherry@whdc.org

Stephanie Cooley, Director of Construction, has been with Frontier Housing for almost 21 years. In those 21 years, Stephanie has worked in each department of the company in some manner, from the first full time receptionist to helping in the Lending Department to working in the Finance Department to working directly with the CEO doing administrative duties to working in the Construction Department. She found her place in the Construction Department. Growing up, Stephanie's father did construction – when she was young he built houses from the ground up, as she got older – so did he – so the workload changed and he took on smaller projects, room additions, small rehab/repair jobs. Stephanie's husband was in the construction business with his father for eighteen years, they did new construction as well as finished out manufactured homes after they were set on site. *I suppose you can say construction was all around me.*

s.cooley@frontierky.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 $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.

jcrum@njclf.com

Brendan Dolan joined Housing Partnership Network in November of 2019 and currently serves as President of Housing Partnership Insurance Exchange (HPIEx). In this role, he works closely with the Subscribers Advisory Committee (SAC), the SAC's chair, and with all members. Additionally, Brendan oversees vendor/partners who support day-to-day operations. Brendan works with HPN leaders and colleagues, as well as the SAC and members in developing the organization's strategic and tactical plans.

Prior to joining HPN, Brendan spent 15 years in the Property & Casualty side of insurance. For the most recent 6 years, Brendan led the growth of Tangram Insurance east coast growth from $1 million to $30 million in written premium. While in this role Brendan focused on social service, heterogeneous group captive, and other specialty insurance programs.

Brendan holds a Bachelor of Arts from Boston College and has the insurance designation, Associate in Risk Management.

dolan@housingpartnership.net

Brian Dowling is CDT's Chief Investment Officer and oversees all of the company's debt and equity investment activity. In his previous role leading CDT's equity business, Mr. Dowling oversaw more than $425 million of property acquisitions, which preserved long-term affordability for over 5,000 households throughout the country. Mr. Dowling has been with CDT since 2005 and spent his entire career in the field of affordable housing development and finance.

Prior to joining CDT, Mr. Dowling served as a Development Associate with Westhab, a non-profit housing developer in Westchester County, New York. Prior to that, he was also a Development Associate with The Richman Group, a national tax-credit syndicator and developer. Mr. Dowling holds a Masters Degree from the Gerald R. Ford School of Public Policy at the University of Michigan and a Bachelor of Arts in Economics and Political Science from the University of Rochester. He is also a member of the Council of Advisors for the Community Development Corporation of Long Island.

bdowling@cdt.biz

Phil Eide, Senior V.P. Housing and Community Development, joined Hope Enterprise Corporation in September 2000. He helped to create and manage a mortgage department for the company, coordinated HOPE's efforts to rebuild the coastal areas devastated by Katrina and works on New Market and Housing Tax Credit developments for Hope. Phil was a Housing and Urban Development fellow before joining HOPE. He previously served as Executive Director of Jackson Metro Housing Partnership, the largest nonprofit housing organization in the Jackson, MS metropolitan area. He obtained an undergraduate degree from the University of Wisconsin and a master's degree from Jackson State University. He served on the Federal Home Loan Bank of Dallas Advisory Board and the Governor's Task Force for Affordable Housing after Hurricane Katrina. He is a board member of Revitalize Mississippi, Working Together Jackson and NeighborWorks Rural Advisory Committee. He is the past chair of Fannie Mae's Affordable Housing Advisory Council and member of Mississippi Association of Affordable Housing Providers.

phil.eide@hope-ec.org

Art Fatum, President of IBP Associates, LLC, consults with a number of companies regarding operating efficiency, governance, reporting, and other key activities. Art recently retired after six years as CFO of MidPen Housing Corporation, one of the nation's leading providers and managers 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, the Low Income Investment Fund, as CFO for seven years before moving to MidPen Housing. He currently sits on two non-profit boards and has also served on a public company board in the past. He also works closely with StrengthMatters and the CFO Advisory Panel that helps guide the organization's direction.

artfatum@ibpassociates.com

Frances Ferguson is Sr. Director, 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 175,000 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 non-profit 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.

fferguson@nw.org

Lorraine D. Gordon has more than 25 years as a senior people leader, executive coach, facilitator, and consultant in the housing, health care, and social and community impact industries. She has a successful track record of building trust with leaders and their teams, coaching them to be more effective in how they engage, interact, communicate, problem solve, and build awareness. Lorraine views herself as a bridge-builder, convener, and champion of racial diversity, equity and inclusion and wonders what a civil, equitable, and inclusive society could look like.

Lorraine is managing director of Lead with Heart, LLC which provides coaching, facilitation and consulting to organizations, as well as curates solutions and holds brave conversations about racial equity and social justice. In 2016 Lorraine helped to establish "Undoing Racism," a group of Washington, DC metro area executive coaches who focus on racial justice initiatives for leaders, organizations, and communities.

Lorraine holds BA and MS degrees in journalism and applied behavioral science from Temple University and John Hopkins University respectively, and an Executive Coaching Certification from Georgetown University. She serves on a board to prevent homelessness and enjoys service work and travel.

lorrainegordon@leadwithheartllc.com

Travis L. Gordon is Senior Director of Finance at Avenue Community Development Corporation. As a dedicated and forward-thinking finance professional, Travis has been meeting the finance and accounting needs of non-profits and private organizations for the past fifteen years. He currently works as Senior Director of Finance for Avenue Community Development Corporation in Houston Texas. Travis joined Avenue in 2018. As the Senior Director of Finance, Travis focuses on developing and linking the strategy of Avenue to its long-range goals and annual operating budget, managing accounting practices and accounting systems to ensure the accuracy of reported results and making meaningful financial information available to decision makers and grantors. He also continuously seeks to further the efficient management of Avenue's resources, ensure the integrity and compliance of business processes and minimize organizational risks. Prior to joining Avenue, he worked for the Early Learning Coalition of the Big Bend Region, where he served as Chief Financial Officer. Travis has a B.S. from Florida A&M University in Business Administration.

travisg@avenuecdc.org

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.

agravelysmith@nw.org

Linda Greene serves as Director of the Redevelopment Corporation for Neighborhood Housing Services of Chicago (NHS). In this capacity, she oversees the administration and management of all programs and services to advance NHS' revitalization mission including real estate development, property preservation and stabilization and asset management. Linda was most recently the Principal at Lucas Greene Associates, where she performed an array of professional services including real estate development consulting, technical support, training, and program planning and evaluation to a diverse client base. Previous to that experience, she worked at the Chicago Neighborhood Institute in positions of increasing responsibility culminating as their Vice President and Chief Operating Officer. Linda holds an MBA in Finance and Real Estate from Columbia University in New York.

lgreene@nhschicago.org

Oliver L. Gross currently serves as President of New Urban Development, LLC a wholly owned subsidiary of the Urban League of Greater Miami, Inc. Oliver, thru New Urban, has primary responsibility for the acquisition, development, construction oversight, financing and property management of the myriad of commercial and residential housing developments owned and/or managed by the Urban League of Greater Miami, Inc. and its subsidiary entities (the "League"). Oliver has experience as a real estate developer, public administrator, and commercial banker. Oliver has earned certifications as a Real Estate Development Professional and a U.S.HUD Certified Occupancy Specialist. Oliver earned an M.S. in Social Administration from Case Western Reserve University and a B.S. in Business Administration Florida A&M University.

OliverG@nudLLC.org

Allison Guttenplan, CPA, Engagement Manager at CohnReznick, is a manager in the Firm's Not-For-Profit and Education Industry Practice. She has gained experience in the not-for-profit industry through providing both audit and consulting services to a variety of organizations including colleges and universities, private foundations, social service organizations, and cultural institutions.

Allison has provided independent audit services for both publicly-traded and private clients, with a concentration in the not-for-profit and higher education industry. Through providing audit services, Allison is skilled in understanding business processes, reviewing and assessing internal controls, and testing financial statement accounts and disclosures. She has a practical knowledge of and experience with U.S. GAAP accounting standards as well as Federal Government regulations related to the Uniform Grants Guidance.

Allison has also provided not-for-profit entities with various consulting services, including financial and operational process analyses, organizational structure analyses, internal audit services, and information system reviews. Allison's relevant project experience includes: Internal Audit Function Outsource and Analysis, Finance Division Organizational Review, Evaluation of Human Resources Business, and Analysis of Administrative Staff Structure and Function.

allison.guttenplan@cohnreznick.com

Phil Hood is Senior Manager, National Real Estate Programs at NeighborWorks® America. Phil's primary responsibilities include management of the Multifamily Indicator (MFI) portfolio reporting site, MFI technical assistance, network training, peer learning, and portfolio perfromacne and risk assessment for 145 NeighborWorks® network organizations, consisting of approximately 150,000 multifamily units.

Prior to joining National Real Estate Programs, Phil managed the NeighborWorks® certification program in Full-Cycle Lending℠ for National Homeownership & Lending Programs, and served as a senior data analyst for the Organizational Assessment Division, where he assessed organizational capacity, performance, and production data. Prior to NeighborWorks, Phil reviewed and analyzed site and landscape plans as a planning technician for the City of Olathe, Kansas. Phil holds the CHAM® designation as a professional asset manager of affordable housing, a Bachelor of Arts in Political Science and Architectural Studies, and a Masters of Urban Planning from the University of Kansas.

phood@nw.org

Julie Hovermale is Vice President & Chief Financial Officer at Better Housing Coalition. Julie directs the organization's financial activities, planning and accounting practices as well as its relationships with lending institutions, stakeholders, and the financial community. Overseeing an array of financing including bank loans, Federal Low Income Housing Tax Credits, HUD 202 grants, and publicly traded bonds, she ensures that all entities are in compliance with GAAP and current tax codes. Julie previously served as the Director of Finance for Virginia Supportive Housing (VSH), a non-profit organization which provides permanent supportive housing to homeless single adults. Earlier in her career Julie worked for over fifteen years at Keiter, an accounting firm based in central Virginia. Her specialty was in the real estate and construction industries. She also is past treasurer for Big Brothers Big Sisters.

Julie earned her Bachelor's degree in accounting from Virginia Commonwealth University and is a Certified Public Accountant.

j.hovermale@betterhousingcoalition.org

Susan M. Ifill is executive vice president and chief operating officer for NeighborWorks America, leading programs and staff supporting network and field operations. She previously served as chief executive officer of Neighborhood Housing Services of New York City (NHSNYC), a NeighborWorks network organization, working to address affordable housing and fight displacement across New York City. Prior to joining NHSNYC, Susan was the senior vice president and chief retail officer for Carver Federal Savings Bank in New York. She retired from Bank of America in 2006 as senior vice president and premier banking market manager. Susan did her undergraduate work at Southeastern Massachusetts University and received a master's degree in management and certification in negotiation and conflict resolution from Cambridge College. She is also a certified Six Sigma Green Belt and a member of Sigma Beta Delta International Honor Society for business, management, and administration.

SIfill@nw.org

Priya Jayachandran joined the National Housing Trust (NHT) as president in early 2018. In her role, she also serves as President of the National Housing Trust Community Development Fund (NHTCDF) and NHT Communities.

Priya leads the Trust's engagement efforts in preservation policy, affordable housing development, lending and multifamily energy efficiency and sustainability through a 'balanced approach' to fair housing. Under Priya's leadership, the trust is committed to protecting, improving and maintaining existing affordable housing, while also establishing new affordable housing communities in quality neighborhoods with access to opportunities.

Priya came to NHT from Volunteers of America, where she served as the Senior Vice President of Affordable Housing Development. In this role, she managed the strategic direction and development of affordable rental housing and led the development, acquisition and/or recapitalization of housing and other real estate projects nationwide. Previously, she worked for the U.S. Department of Housing and Urban Development's (HUD) Office of Multifamily Housing Programs as a Senior Policy Advisor to help FHA's work with the Low-Income Housing Tax Credit. In December 2014, just four months after starting at HUD, she also assumed Acting Directorship of HUDs Multifamily front office, the Program Administration Office. In December of 2015, she stepped in to the role of Deputy Assistant Secretary for Multifamily Housing Programs.

Prior to joining HUD, Priya spent more 15 years in community development real estate banking in New York and Washington, DC. During that time, she led teams delivering debt and tax credit equity, Historic Tax Credits and New Markets Tax Credits for real estate developers of affordable housing and charter schools. Under Priya's leadership, the Mid-Atlantic market at both Citi and Bank of America were the top production offices in the country. Priya is a recognized industry expert on affordable finance deal structuring. Priya has also worked for the Inter-American Development Bank (IDB) in La Paz, Bolivia as a consultant to women's microcredit organizations; Credit Suisse as an investment banking analyst; and California State Treasurer Kathleen Brown as a Capital Fellow. Priya earned her B.A. from the University of California and her MPA from the Woodrow Wilson School at Princeton University

pjayachandran@nhtinc.org

David Jones serves as Vice President of Human Resources for The Community Builders, Inc. (TCB) in Boston, a position he has held since 2015. David shapes and leads TCB's talent management efforts, serves as an advisor on the executive leadership team, and develops staffing strategies and processes to help develop and retain results-driven employees. David has almost 30 years of Human Resources experience, including previous non-profit experience and 17 years in the for-profit sector.

david.jones@tcbinc.org

Glenn Karlson, holds a BIS in Business Real Estate and a Masters of Real Estate Development (MRED) from Arizona State University. Glenn has overseen Trellis's real estate development for over 3 years. During this period the department has seen great growth with 5 new projects currently in different phases with the final projects set for production in 2021.

Glenn brings a combined 20 years of experience of managing process and people with 8 years specifically related to Real Estate. Known for his standout understanding of the entire real estate development lifecycle with knowledge and area involvement that spans across Arizona and the Southwest Region. With experience that includes single family (detached and attached) infill developments, multi-family, subdivisions, and large master planned developments.

gkarlson@trellisaz.org

Robert Kennedy III – RK3 is the founder and CEO of Kennetik Kommunications, a leadership development and presentation training company. Through keynotes, corporate workshops, and virtual experiences, Robert works with leaders who need to deliver critical messages with confidence.

Robert wants to live in a world where people are no longer afraid to confidently tell their stories...and they can also eat Reese's Peanut Butter cups for every meal without any repercussions.

His work as a keynote speaker and trainer in the area of leadership communication has led him to work with organizations such as the US Coast Guard, Barnes & Noble, Panda Restaurant Group, AARP, Comscore as well as appearances on local networks like Fox45 and CW24.

He is involved in his community through various boards including the Association for Talent Development Maryland Chapter, youth leadership programs and helping non-profits conduct mock interviews.

He is also a professional member of the National Speakers Association.

rkennedy@robertkennedy3.com

Jill Kolb is the Senior Director in the Housing Accounting Department of National Church Residences. Her responsibilities include the supervision of a team who perform accounting activities including general ledger preparation, financial reporting, and year-end audit and preparation for 340+ housing properties as well as implementing and maintaining a system of internal controls. Jill has 18 years of experience in accounting with a primary focus in affordable housing and Low Income Housing Tax Credits. Previous to her employment at National Church Residences, she was an audit Manager at Plante Moran; serving clients in the affordable housing, non-profit and senior living industries.

She holds a Bachelor of Science in Accounting and a Masters of Accounting Degree from Miami University and is a Certified Public Accountant.

JKolb@nationalchurchresidences.org

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.

ghlacroix@roxburytenants.org

Andre Lanier is Principal at Xact Appraisal Services. As a Chicago native, it was a combination of Andre's social work activism, community involvement, and entrepreneurial spirit that led him to what he believes was a higher purpose for his life through his real estate business. For over 18 years, Andre has skillfully and objectively represented the market value and asset condition of residential properties for collateralization in all seventy-seven (77) Chicago neighborhood communities. His knowledge of real estate is more than analyzing data, it encompasses hands-on experience on the front lines. His background and experience as a full-time real estate appraiser, home inspector, real estate broker, and renovation/construction specialist has given him a competitive advantage in the real estate market by bringing his specialized expertise to these positions and providing a 360° view of the RE transaction.

lanier.andre@gmail.com

Kimberly Latimer-Nelligan is President of the Low Income Investment Fund (LIIF). Kimberly oversees all of LIIF's lending and investing activities, including structured products, national markets, credit risk and lending operations. She also leads LIIF's programmatic activity and strategic initiatives. Under Kimberly's leadership, LIIF has launched several new program areas over the past decade, including investing in fresh food, community health and transit oriented development. During her tenure, LIIF has also expanded into new markets, opening lending offices in Washington, D.C. and Atlanta, GA. LIIF currently has over $800 million of capital under management and deploys over $200 million of capital annually. Most recently, she led LIIF's joint venture with Stewards of Affordable Housing for the Future to acquire a controlling interest in the National Affordable Housing Trust, a national nonprofit LIHTC syndicator. Kimberly's background in community development is extensive. Before joining LIIF in July 2008, she was with Citibank for over 20 years. Most recently, Kimberly served as the Managing Director of National Lending and Investments, overseeing a $3 billion business within Citibank Community Development. Kimberly serves on the Boards of the Community Reinvestment Fund and the Raza Development Fund, both national CDFIs. She received her B.A. from Hobart and William Smith Colleges and her M.B.A. from Columbia University.

klatimer-nelligan@liifund.org

Gail Latimore is a veteran of nonprofit management and development, with over 30 years' experience working in the public or nonprofit sector. She has served as the Executive Director of Codman Square Neighborhood Development Corp (NDC) since 1998. In this role, she has overall responsibility for the management, growth and health of one of Boston's largest community development corporations. During Gail's tenure, the NDC has grown significantly, expanding its service base to meet the needs of the community. Additionally, during this time, the NDC has developed over 500 units of affordable housing, both homeownership and rental.

Gail holds a Bachelor's degree in Architecture from Columbia University and has completed coursework towards a master's degree in Urban Affairs at Boston University. A founding Board member of the Dudley Street Neighborhood Initiative, Gail continues to serves on several state, regional and local boards dedicated to responsible community development, including the Massachusetts Association of Community Development Corporations and the Four Corners Action Coalition.

gail@csndc.com

Christopher J. Laurent is President of Cinnaire Solutions. Chris leads Cinnaire's nonprofit development affiliate, Cinnaire Solutions, in its work throughout its footprint in the Upper Midwest and Mid-Atlantic, with particular focus in Detroit, Wilmington, DE, and La Crosse, WI. Cinnaire Solutions' business model exclusively partners with undercapitalized or capacity-limited CDCs and emerging development firms owned by persons of color, serving as both a coach and bench strength to help its partners transform their communities. Cinnaire is a full service CDFI with its corporate headquarters in Lansing, Michigan. He lives in Madison, Wisconsin with his wife, Chris, and their children. He's an avid traveler, camper, Zamboni driver, and struggling guitar player.

claurent@cinnaire.com

Karen Law is Executive Vice President of Talent, Equity and Culture at CommonBond Communities. Karen has more than 25 years of experience in nonprofit management, including leadership in transformative diversity and inclusion efforts, human resources, organizational management and also major gifts fundraising and donor cultivation. She has a varied set of professional experiences in both the for-profit and nonprofit sectors, having previously served as Director of Human Resources and Organizational Culture at Nexus; Executive Director of the nonprofit Our Justice; an entrepreneur; and in various roles at Project for Pride in Living (PPL).

Karen has a deep knowledge of systemic and structural inequalities and a desire to combat and end systems of oppression. Her professional and personal experiences reflect her commitment to social justice, her investment in developing individuals and building teams, and bringing heart and compassion to often difficult systems change work.

karen.law@commonbond.org

Sharon Lee is the founding Executive Director of the Low Income Housing Institute (LIHI), a non-profit organization based in Seattle founded in 1991. LIHI develops and operates housing for low-income and homeless people and provides supportive services to assist residents in maintaining stable housing and increasing self-sufficiency. Sharon oversees a staff of 180. LIHI staff has developed over 4,500 units of rental and homeownership housing. LIHI owns over 2,200 units serving individuals, families, seniors and those with special needs. She is an advocate for housing justice. LIHI has pioneered the creation of tiny houses villages to shelter over 1,000 homeless people per year. Sharon holds a Master of Architecture and a Master of City Planning from M.I.T. and a B.A. with honors from the University of Pennsylvania. She was awarded an Honorary Doctorate of Humane Letters from Wilkes University for her work on ending homelessness. LIHI's housing has won national and local awards for design excellence and environmental sustainability.

sharonl@lihi.org

Fathia Macauley joined Housing Trust as Chief Lending Officer in September 2019. She provides oversight for Housing Trust's lending programs including Multifamily, first-time homebuyer programs and Accessory Dwelling Unit (ADU) initiatives. Fathia has been in the field of community development finance for the past 25 years, including over 18 years of experience financing and developing redevelopment projects throughout California, ranging from affordable housing development projects to community facilities such as charter schools, community health clinics, faith-based facilities and mixed-use development projects. Throughout her career she has managed over $600M in CRA and affordable housing development projects and participated in the creation of over 1,000 affordable homes, either as a developer or lender. Fathia has also written several community plans and conducted community development research on the intersection of neighborhood revitalization and community investment.

She was most recently California Market Lead at Capital Impact Partners, leading strategic planning for affordable housing lending and business strategy for California. She managed a $70M CA loan pipeline as well as three venture loan funds, including leading Capital Impact's participation in The Bay's Future Fund. She was a lead originator for mission focused lending to affordable housing developers, FQHCs, social service agencies and charter schools. Prior to Capital Impact Partners, Fathia served as Director of Business Development, Northern California for Clearinghouse CDFI, opening the Oakland office and expanding social impact lending in Northern California. Earlier, Fathia was Associate Director, Investment Officer for Nonprofit Finance Fund where she originated loans and New Markets Tax Credit projects and provided technical assistance to nonprofit borrowers in the Western United States.

fathia@housingtrustsv.org

Bill Mague is the Director of Acquisitions and Special Projects for Aeon, Inc., a 30-year old nonprofit housing developer, manager, and owner in the Twin Cities. He is responsible for non-tax credit acquisitions, specifically naturally occurring affordable housing (NOAH) projects, with a goal of adding 1,000 units annually to the Aeon portfolio. Bill has 30 years of experience in public and non-profit real estate finance, development, and strategic management including 12 years as Vice President of Asset Management for Artspace Projects, Inc., the nation's leading non-profit developer of affordable space for artists and their families, and 13 years at Royal Bank of Canada (successor to Dain Bosworth) as Vice President of Fixed Income Banking (Non-Profits, Higher Ed, Housing & Healthcare). In these capacities he has led or participated in over $1.5 billion in tax-exempt financing, tax-credit development, and management of affordable multifamily housing, senior assisted living facilities, higher education and private K-12 education capital projects, transportation and utility projects. A native of New Orleans, Bill graduated from Carleton College, Northfield, MN with a BA in Economics.

bmague@aeon.org

Marcella Maguire, Ph.D. is Director of Health Systems Integration for the Corporation for Supportive Housing (CSH). Her work nationally focuses on the intersection of the housing and healthcare sectors in the financing, policy and implementation arenas. Prior to joining CSH, Marcella worked for 17 years for the City of Philadelphia leading efforts to integrate behavioral health, managed care and affordable and supportive housing systems to strategically address community needs.

marcella.maguire@csh.org

Dr. Michael McAfee is President and CEO at PolicyLink and oversees strategy development, the alignment of PolicyLink assets, and the achievement of policy wins that ensure all people in America have economic security, live in healthy communities of opportunity, and benefit from a just society. He came to PolicyLink in 2011 as the inaugural director of the Promise Neighborhoods Institute at PolicyLink. Under his leadership, Promise Neighborhoods was secured as a permanent federal program and he led efforts to improve outcomes for more than 300,000 children. He is also the catalyst for a growing body of work at PolicyLink — corporate racial equity — which includes the first comprehensive tool to guide private-sector companies in assessing and actively promoting equity in every aspect of their company's value chain. Before joining PolicyLink, Michael served as senior community planning and development representative in the Chicago Regional Office of the U.S. Department of Housing and Urban Development (HUD). While at HUD, he managed a $450 million housing, community, and economic development portfolio where he partnered with local leaders to create more than 3,000 units of affordable housing and 5,000 jobs and to ensure access to social services for more than 200,000 families. Before his public service, Michael served as the director of community leadership for The Greater Kansas City Community Foundation and Affiliated Trusts. Michael earned his Doctor of Education in human and organizational learning from George Washington University and completed Harvard University's Executive Program in Public Management.

michael@policylink.org

Tracy McMillan is Managing Partner of HCGA Consulting Partners, LLC, a boutique executive search and ***S***trategic ***T***alent ***A***cquisition & ***R***etention ***S***olutions firm based in Fairfield, CT with affiliate offices in Washington, DC. After starting his career with PwC in 1986 out of UVA's McIntire School of Commerce and later in Corporate Finance for Kraft Foods, Tracy found his ***true calling*** in executive search back in 1995. Earlier in his over 25-year search career, Tracy has placed executives and senior leaders in companies large and small, public and private, across all functional areas and industries.

For the past 10 years, Tracy has focused on and specialized in placing CEOs, Presidents, Executive Directors and C-Suite leaders within both the affordable housing and non-profit (501c3) sectors. Over this span, he has conducted successful searches and cultivated strong relationships with Mercy Housing, Tenderloin Neighborhood Development Corporation as well as 11 State Housing Finance Agencies (HFAs) across the country.

Before serving as Vice President, Global Talent Acquisition for the National Basketball Association, Tracy McMillan was employed by Diversified Search, a top 10 global executive search firm, for 5 years as a Managing Director in the firm's New York and Philadelphia Offices. Prior to joining Diversified Search, Tracy founded, led, and managed The McMillan Group (TMG), Inc. – Philadelphia metropolitan area-based retained executive search firm that served clients with distinction across all functional areas and industries. Tracy began his executive search career with Carrington & Carrington, in Chicago, IL where he rose from the level of Senior Consultant to Managing Consultant in less than two years. Later, he joined LaMonte Owens, Inc. where he served as Senior Vice President.

Tracy currently serves on the Board of Directors for UVA's Jefferson Scholarship Foundation and the National Center for Community and Justice. He is a past Chairman of the Ridley at UVA Alumni Scholarship Board of Directors. Tracy is an INROADS/Philadelphia Alumnus, past Chair of the National INROADS Alumni Association Board of Directors, and a Life Member of Kappa Alpha Psi Fraternity, Incorporated.

Tracy is a Philadelphia native who in his spare time enjoys golf, tennis, and competitive sports. He and his lovely wife, Samm, reside in Fairfield, CT, and they are the proud parents of three adult daughters: Ariana (28), Morgan (25) and CJ (24).

tracymac@hcgacp.com

Michael Monte is Chief Operating Officer at Champlain Housing Trust (CHT). Michael joined the executive leadership team in December 2007. In January, he will assume the position of CEO. He has over 30 years of community and economic development experience. He worked at Burlington's Community and Economic Development Office (CEDO) from its creation and was its longest serving Director. Prior to CEDO, he was employed as Executive Director for several non-profit organizations including the King Street Youth Center. Michael is also a founder and partner of the independent community development consultant group, Burlington Associates, where he worked with Community Land Trusts around the country.

mmonte@champlainhosingtrust.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

Griffin Moore is Chief Financial Officer at Peoples' Self-Help Housing. Griffin has been part of the accounting and finance department for Peoples' Self-Help Housing Corporation for over 7 years. He started with Peoples' Self-Help Housing as the Assistant Controller before moving to the Controller and was promoted to the CFO position nearly 2 years ago. Prior to moving into the Affordable Housing Industry, Griffin spent 8 years in the Hospitality Industry as a Controller and Financial Analyst. Griffin attended the University of Missouri – Columbia where he received his BA in Banking and Finance.

griffinm@pshhc.org

Nancy Morton, CPA has been in the practice of public accounting since 1986, having worked with the international accounting firms of Arthur Andersen and Deloitte & Touche prior to joining Dauby O'Connor & Zaleski, LLC (DOZ) in December of 2001. Nancy is a CPA and a Chartered Global Management Accountant.

Nancy specializes in the real estate industry, with a particular focus in partnership and not-for-profit development, structuring, and tax matters. Nancy is the partner in charge of the real estate consulting practice for DOZ. In this capacity, she is responsible for spearheading sponsor reviews, disposition analysis, underwriting analysis, developer services suites, and due diligence reports. She also consulted in the creation of DOZ's proprietary underwriting model to analyze the investment of a LIHTC property throughout its economic life.

Nancy has substantial experience with properties financed in part with LIHTC pursuant to IRC Section 42 and works with the tax department in regards to the annual preparation and/or review of hundreds of partnership and not-for-profit tax returns related to affordable housing communities, as well as funds that invest in those entities. Nancy is also involved with the 10% cost certifications required for carryover allocations, final cost certifications required for issuance of form(s) 8609, 95-5 calculations and analysis, and arbitrage rebate calculations required for tax-exempt bond financed transactions.

Nancy also serves on the technical review committee for a LIHTC syndicator to review the structure and identify regulatory issues applicable to new transactions in which the fund intends to invest. Nancy is a frequent speaker on LIHTC technical matters including Year 15 disposition scenarios, tax reform, and various tax credit topics. In addition, Nancy frequently leads internal and external training on partnership and not-for-profit compliance matters.

nmorton@doz.net

Bob Moss, National Director of Government Affairs, leads CohnReznick's federal government relations efforts with a focus on the affordable housing industry. Bob has 30 years of affordable, multifamily housing experience and he currently serves as Chairman of the National Leased Housing Association, and also serves as the Chairman of the non-partisan Housing Advisory Group which is active in preserving the Low-Income Housing Tax Credit (LIHTC) Program in Congress. Bob has testified before the full House Ways and Means Committee on tax credit reform and residential real estate hearings, as well as Senate and House Subcommittees on affordable housing issues. In 2015, he was inducted into the National Affordable Housing Hall of Fame by *Affordable Housing Finance* magazine.

Bob.moss@cohnreznick.com

Brittney Murphy, CPA is Chief Financial Officer at Fahe. Brittney's 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. Under Brittney's leadership, Fahe successfully implemented the Virtual CFO program, which brings high level financial analysis and organizational strategy capacity at a price point smaller nonprofits can afford. She is an expert in internal systems and compliance, and holds in-depth knowledge of financial analysis for managerial decision-making. Prior to joining Fahe in 2011, Brittney worked for a public accounting firm focusing on governmental and nonprofit audits.

bmurphy@fahe.org

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 develop multifamily housing. He supervises and reviews the performance data collection for the 145,000 multifamily units owned by NeighborWorks®America members. In 2005, Harold designed and launched Neighborhood Risk Management Corp. As NeighborWorks®America representative, Harold is President of the Consortium of Housing and Asset Management (CHAM®) and heads the Curriculum Development Committee and, of course, holds the CHAM® designation as a professional asset manager of 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 housing 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.

hnassau@nw.org

Michael Novogradac is the managing partner of Novogradac, which has been in business since 1989. He specializes in affordable housing, community development, historic preservation and renewable energy. Mr. Novogradac's focus is in real estate taxation and accounting. He is the author of numerous real estate-related tax and accounting articles and books, including the Novogradac Opportunity Zones Handbook, the New Markets Tax Credit Handbook and the Low-Income Housing Tax Credit Handbook. A frequent speaker at tax incentive conferences and forums throughout the country, Mr. Novogradac is active in advocating for the inclusion of affordable housing, historic preservation, community development and renewable energy incentives in federal and state tax policy and broadcasts a weekly podcast, Tax Credit Tuesday. As a leading industry expert, he is frequently quoted in national media, such as *The Wall Street Journal*, *The New York Times, Politico*, *Bloomberg*, *Forbes*, *CNBC News*, *NBC News*, *National Public Radio and Crain's New York Business*. In addition, he serves as advisor on industry and governmental affairs for the NMTC Working Group, LIHTC Working Group and the Opportunity Zones (OZ) Working Group. Mr. Novogradac also serves on the executive committee of the Housing Advisory Group and the boards of directors of the Affordable Housing Tax Credit Coalition, National Housing Conference, NMTC Coalition and Historic Tax Credit Coalition. In 2016, Mr. Novogradac was inducted into the Affordable Housing Hall of Fame. He also received The Affordable Housing Visionary Award from The NHP Foundation in 2018, in recognition of his contributions to the affordable housing community and in 2020 was honored as one of the top 25 OZ Influencers by *Opportunity Zone Magazine*. Mr. Novogradac graduated from the University of California, Los Angeles, with a bachelor's degree in economics. He received an MBA from the University of California, Berkeley. He is licensed in California, Oregon, Maryland and Texas as a certified public accountant. You can follow Mr. Novogradac on twitter @novogradac and on his blog at www.novoco.com/blog or listen to his weekly podcast at www.novoco.com/podcast.

michael.novogradac@novoco.com

John O'Callaghan has served as the President and CEO of Atlanta Neighborhood Development Partnership (ANDP) since 2006, where he leads the organization's policy, lending, and housing development programs aimed at ensuring mixed income housing opportunity near job centers across metro Atlanta.

ANDP is currently focused on addressing the region's foreclosure crisis and the lasting impact of negative equity on neighborhoods. ANDP is one of the nation's largest nonprofit redevelopers of vacant foreclosed homes – impacting 432 single-family units and 88 multifamily units since 2008.

Under John's leadership, ANDP's CDFI lending arm has developed an innovative partnership with Philadelphia-based Reinvestment Fund to better deploy community development capital. In addition, ANDP helped to spearhead Piece by Piece, a regional foreclosure response initiative comprised of more than 150 public and private partners. Piece by Piece was recognized by the National Housing Conference with a 2015 Housing Visionary Award.

John's nonprofit experience includes time with United Way and The American Red Cross. His governmental background includes Mayoral appointed positions with the City of Atlanta and elected service on the Fulton County Board of Commissioners and Atlanta City Council. He also spent 11 years in regional public affairs with Fannie Mae.

John currently serves on: Atlanta Regional Commission's Environmental Land Use Committee, Atlanta Metropolitan College Foundation Board of Directors, Housing Partnership Network Board of Directors, Framework Board of Directors, and the National Housing Conference Board of Governors. He is playing active roles in local and national networks focused on stabilizing communities devastated by foreclosure.

jocallaghan@andpi.org

Alia Pacombe is Associate Director of Community Engagement at Urban Edge. She came to Urban Edge in 2010 from Lena Park Community Development Corporation in Dorchester, where she was Resident Services Coordinator. Alia earned a BA in Communications and Management at Regis College.

apacombe@urbanedge.org

Kelly Perlman, is a partner at Plante Moran in the real estate group. She has more than fifteen years of experience in providing accounting and auditing services to affordable housing and real estate organizations, with a focus on tax credit financing and HUD regulated entities. In addition, Kelly has extensive experience in the affordable housing industry serving both not-for-profit and for-profit owners, managers and developers of multi-family and assisted living properties. She is one of the firm's real estate technical experts and a member of the firm's professional standards department, which provides staff and clients with guidance and other information on new and proposed professional standards, consultations, and research as to the application of accounting and auditing standards for issues, and pre-issuance reviews of financial and other attestation reports.

Kelly.Perlman@plantemoran.com

Jay Perlmutter, Director of Single Family Development, joined Atlanta Neighborhood Development Partnership (ANDP) in March 2016 and is responsible for the management and oversight of ANDP's single-family development efforts. He is responsible for managing several government contracts and non-government partnership to assist ANDP in achieving its mission of promoting and creating mixed income communities. He manages and oversees all day to day activities performed under the program from site selection to homebuyer disposition. Jay has over 18 years of experience in real estate project management with experience in single family development, real estate market analysis and program design and implementation. Jay has a Bachelor's degree from Emory University and a Master's degree in City and Regional Planning from Georgia Institute of Technology.

jperlmutter@andpi.org

William F. Pickel is Chief Executive Officer of Brilliant Corners. Bill joined Brilliant Corners in 2007. During his tenure, he has been fortunate to work with internal and external partners who shared and operationalized his belief in the power of supportive housing to change lives and improve communities. During his decade with the organization, Brilliant Corners has emerged as a leading supportive housing provider with a track record of piloting, replicating and scaling system-changing programs – particularly programs for people transitioning from homelessness or institutionalization. He has championed the agency's re-branding, its alignment with the guiding principles of supportive housing, its geographic expansion outside the Bay Area, and expanding its mission to serving a range of vulnerable individuals who could benefit from supportive housing. Under his tenure, Brilliant Corners' workforce has grown from 2 to over 300 full-time team members working in our San Francisco and Los Angeles hubs with expertise in supportive housing development, property management, housing services, and case management. Prior to joining Brilliant Corners, Bill served as Director of Housing Development for California Community Housing, where he had primary responsibility for all real estate development and financing, securing $250M in federal, state, local and private funding in support of 18 multi-family projects including HUD and Low-Income Housing Tax Credit housing. He holds an M.A. in Religious Studies from Boston University, a Bachelor's degree in Literature from the State University of New Jersey, and an Advanced Affordable Housing Development Training Institute Certificate from the Local Initiative Support Corporation.

bpickel@brilliantcorners.org

Paula Zayas Planthaber is the Director of Lending within NHPL/National Initiatives at NeighborWorks America. There are 82 CDFIs in the NeighborWorks network across the country whose assets range from $2 million to over $500 million. There are an additional 40 network organizations that are non-certified CDFI lenders. She provides technical assistance through one-on-one conversations, webinars on national challenges, conducts sessions at the NTI, develops training curriculum for place-based trainings, represents CDFIs at investor forums, conducts surveys of the networks' needs and demands and works to maintain current databases representing our CDFI network.

Prior to joining NeighborWorks America, Paula founded PZP Consulting, a nationwide non-profit management consulting business with over 35 years' experience in the community development finance industry. As a resident of Elizabeth, NJ, she worked with previously incarcerated individuals to complete workforce development training and job placement and was a financial analyst in a local government community development department. Paula was also the deputy director for a local economic development company, developing and operating a micro/small business loan fund and mixed-use development financing, and one-stop business assistance center for entrepreneurs and job-seeking residents.

Paula's areas of expertise include feasibility, development and implementation of lending programs, business planning for CDFIs, market analysis studies, risk assessment and management, lending policy and procedure manuals, performance measurement systems (Success Measures Certified), organizational development, meeting facilitation, delivering trainings and presenting workshops. She holds a master's degree in Public Administration from Central Michigan University and is a member of the Association for Enterprise Opportunity, the Opportunity Finance Network and the International Economic Development Council.

PPlanthaber@nw.org

Tracy Pride is Director of Real Estate Practice / SVP at IMA Financial Group, Inc. Tracy joined IMA in October of 2000 and is currently a Director in IMA's Real Estate Practice. She is responsible for marketing, placement, program structure and strategic direction for her clients. Along with the being the strategic lead for the IMA Account Management Team, Tracy works closely with IMA's Risk Control and Claims teams to develop and implement services and products specific to the Real Estate industry and that bring meaningful risk management solutions to her clients. For the past 14 years, she has been Director and strategic lead for all broker services for the Housing Partnership Insurance Exchange Captive Insurance program that provides Property, General Liability and Workers Compensation coverage for 25 developer/owners across the country.

Tracy started her insurance career in 1985 as an underwriter with the St. Paul Companies. The majority of her 14 years on the insurance carrier side was with Crum & Forster Insurance as their Umbrella & Casualty Product Line Manager and then the Marketing Manager for the Denver Region, which included the Rocky Mountain West and Pacific Northwest Territories.

tracy.pride@imacorp.com

Andrea R. Ponsor is President and CEO at Stewards of Affordable Housing for the Future (SAHF). As President and CEO, Andrea works to identify, develop and advocate for key strategic issues of concern to SAHF and its members, creates a level playing field for effective, mission oriented nonprofit businesses and grows SAHF's members toolkit for creating sustainable affordable rental homes that foster equity, opportunity, and wellness for residents.

Andrea has 18 years of experience in affordable housing and joined SAHF as Executive Vice President in 2016. 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.

In addition to her role at SAHF, she serves on the board of SAHF's affiliate, the National Affordable Housing Trust, a low income housing tax credit syndicator, and serves on the board of N Street Village, the largest provider of shelter and services for homeless women in Washington, D.C.

aponsor@sahfnet.org

Cheryl Read, SHRM-CP is the Chief Administrative and Financial Officer at Champlain Housing Trust. In this role she is responsible for the organization's IT, Administration, Human Resources, and Finance functions, maintaining a focus on equity and inclusion, efficiency and sustainability. Cheryl participated in NeighborWorks America's Race Equity Diversity and Inclusion Leadership Program in 2017, and completed its Achieving Excellence program in 2020. She joined CHT in 2008 with a background in small business management, and was responsible for the organization's lending programs from 2010 until joining the executive team in 2017.

cheryl.read@champlainhousingtrust.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

Justin Rumer, JD, CPA is Tax Principal at Dauby O'Connor & Zaleski, LLC. (DOZ) Justin started his career as an auditor with DOZ in 2008. After obtaining his CPA license, Justin enrolled in the Indiana University Robert H. McKinney School of Law in 2010. Justin worked as a law clerk and trial attorney in the litigation department of Barnes & Thornburg LLP until 2017. As a trial attorney, Justin's practice focused on all manner of business disputes including breach of contract, product liability, trade secrets, and Indiana franchise law. In 2017, Justin returned to DOZ to work in the tax department.

Justin's current practice focuses on advising developer, manager, investor, and syndicator clients in the affordable housing industry on all manner of federal and state tax issues with an emphasis on multi-family projects utilizing IRC Section 42 low income housing tax credits.

Justin leads the firm's Opportunity Zone practice. Justin is involved with DOZ's Industry Advantage Committee and Training Committee where he is responsible for updating colleagues and clients regarding developments in the affordable housing industry and tax law.

Justin is a frequent speaker, panelist, and presenter at various affordable housing conferences, webinars, and training sessions.

jrumer@doz.net

Trevor Samios is a Vice President at WinnCompanies, where he oversees the design, growth and impact of Connected Communities, WinnCompanies' national approach to driving positive community outcomes across their national affordable, military, workforce, and mixed-income housing portfolio. Prior to coming to WinnCompanies in 2017, Trevor led the Community Impact team at Boston-based Preservation of Affordable Housing (POAH) and oversaw operations for Community Life, The Community Builder's resident services platform. Trevor lives in Boston, MA with his family and serves on multiple community development boards and affordable housing policy councils including the National Apartment Association's (NAA) Affordable Housing Council and the HUD Family Self-Sufficiency (FSS) advisory committee.

tsamios@winnco.com

Valorie Schwarzmann is the Chief Financial Officer and Senior VP of Program Operations for Columbus Housing Partnership, Inc. dba Homeport. Her responsibilities include oversight of (1) financial reporting, planning and strategizing for Homeport and its related affiliates; (2) grants management and operations of Resident Services and Housing Advisory Services; and (3) asset management of Homeport's rental portfolio. Before joining the staff of Homeport in 2010, Valorie was on its Board of Directors for three years as Treasurer. Previously, Valorie was a tax advisor at Plante & Moran, LLC with a primary focus on business consulting and tax return filings for not-for-profit organizations and Low Income Housing Tax Credit entities. Prior positions include tax advisor at GBQ Partners and Ernst & Young with an emphasis on mergers and acquisitions and management of compliance services; trust administrator at Huntington Trust Company; and Treasurer of four Columbus not-for-profit Boards. She holds a law degree from New England School of Law and a Bachelor of Arts in Politics & Government from Ohio Wesleyan University. She is a Certified Public Accountant (CPA.29428 expiring 12/31/2021) and is currently working on completing her Certified Housing Asset Manager (CHAM) designation through NeighborWorks America.

valorie.schwarzmann@homeportohio.org

S. Scott Seamands is a partner at Lindquist, von Husen & Joyce LLP in San Francisco, California. Scott has over 40 years of experience in public accounting. His core focus is audits of not-for-profit organizations and affordable housing entities. His other areas of expertise include real estate development and management, construction contractors, retail, manufacturing and professional services. Scott has performed dozens of peer reviews of other CPA firms nationwide on behalf of the American Institute of CPAs and the California Society of CPAs. He is also an expert witness in the area of construction accounting. Most recently Scott served as Audit Committee Chair for the California Society of CPAs, an association representing 45,000 CPAs, for the past six years.

Scott is recognized for his leadership in various professional associations and frequently speaks and trains CFOs and accounting staff at affordable housing industry association events and webinars. He served as the firm's Management Committee Chair from 1994 through 2014 and as the 2012 President of the San Francisco Chapter of CalCPA. Among his clients, he is known for walking his clients through technical issues as well as being diplomatic and easy to work with.

sseamands@lvhj.com

Bob Simpson is a nationally recognized expert in affordable, green and healthy housing and the founder of Simpson Impact Strategies, a housing finance and public policy firm that helps clients integrate green and healthy housing features within their organization while maximizing the environmental and social impact of their housing investments. He previously served as vice president and head of Fannie Mae's Affordable and Green Multifamily Business and oversaw the establishment of the company's successful green and healthy housing financing initiatives.

bob@simpsonimpact.com

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.

CSmoot@naht.org

L. Steven Spears is Chief Financial Officer and Senior Vice President of Mercy Housing, Inc. Steve 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. Spears 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 Boards of the National Affordable Housing Trust and the Housing Partnership Equity Trust.

sspears@mercyhousing.org

Lori Sweeney, SHRM-SCP is a Senior Human Resource Specialist with Insperity. Lori has more than 18 years' experience working in the Human Resources field. She has been with Insperity for the past three years. Prior to Insperity she worked in both the Pharmaceutical and Technology industries in various roles, including Generalist, Manager and HR Director.

Lori is a Senior Certified Profession through the Society for Human Resources and has a Certification in Human Resources Practices from Cornell University.

Lori.Sweeney@insperity.com

Joan Tally is a Managing Director of Morgan Stanley and serves as COO of the Community Development Finance (CDF) group, overseeing community development lending and investing initiatives nationally. CDF partners with nonprofit intermediaries, government agencies and other financial institutions to provide capital and expertise that produce lasting social and economic benefits, such as affordable housing, workforce development, small business loans, and community services.

Prior to joining Morgan Stanley, Joan spent 12 years at the New York City Housing Development Corporation, directing real estate lending and asset management activities for the nation's largest municipal bond issuing agency for affordable housing. Her previous experience includes planning and development work at the Manhattan Borough President's Office and with Neighborhood Housing Services of New York City. Joan is Chair of the LISC NYC Local Advisory Committee and serves on the board of Settlement Housing Fund, Inc. Joan received a Master of Urban Planning and a Bachelor of Arts from Hunter College of the City University of New York. She lives in Brooklyn, NY with her husband and two sons.

Joan.Tally@morganstanley.com

Len Tatem of Tatem Consulting, LLC is a real estate asset management and policy consultant for developers and property management companies across the country. He has spent more than 30 years in the field of real estate and investments. His current focus is with business and portfolio sustainability analysis, property and portfolio repositioning and maximizing performance through capital planning, green and sustainable design, innovative marketing, rehabilitation and debt restructuring. Len provides one-on-one mentoring and group trainings. He is also active coaching groups to prepare and execute Year 15 exit strategies, evaluating financing structure and assessing and restructuring asset and property management lines of business. He has been the architect of asset plans to restructure and reposition properties and portfolios in various areas of the United States. Len believes the best consultants also remain practitioners. In this spirit, he is working with OppCo Communities in Massachusetts.

Prior to being a consultant, Len was the Director of Finance for Harvard University's Real Estate Corporation. This non-academic portfolio valued at over $2 billion included market rate, rent control and subsidized housing, hotels, warehouse and retail space and office buildings. He also was responsible for the negotiation of more than $40 million worth of service contracts annually in support of both its non-profit and for profit management companies. In addition, Len supported the organization's development and construction management department by conducting marketing and feasibility studies. He was also involved with securing 501c3 bond financing in support of construction projects at Harvard University and Boston College.

In addition to having a Master's Degree concentrating in Administration, Planning and Social Policy from Harvard University, Len has a Bachelor of Science concentrating in Finance from the University of Rhode Island.

TatemConsult@att.net

Bob Taylor is an Executive Director at Morgan Stanley and is part of its Community Development Finance unit. He is an experienced commercial and community development banker with 36 years' experience lending to and investing in affordable housing projects, community facilities, healthcare facilities, small and middle market businesses, as well as technology companies. Prior to joining Morgan Stanley, he spent 25 years at Wells Fargo in similar roles. He started his career with Bank of America in San Francisco as a commercial banking lending officer.

His work includes lending to, investing in, and raising capital for non-profit organizations, Community Development Financial Institutions, FQHC's, SBIC's, and for-profit companies.

Bob is a graduate of the University of San Diego, with a degree in Business Administration. He is very active in his local community and church, and lives with his wife and family in the San Diego, CA area.

robert.taylor@morganstanley.com

Matthew Troiano, CPA is a Partner at AAFCPAs. Matt is a hands-on leader in the firm's community and economic development practice, serving community development corporations (CDCs), affordable housing and mixed-use real estate projects, and their lending institutions. He also has extensive experience serving multiservice human & social service providers. He advises these sophisticated nonprofits and their related for-profit limited partnerships, providing assurance solutions and assessing tax situations to help maximize profits while minimizing tax liability.

Matt is highly-sought after for his knowledge on all new, existing, and changing applicable tax credits in the CDC industry, including: the Massachusetts community investment tax credit, new markets tax credits, low income housing tax credits, Federal and state historic tax credits.

He is responsible for leading impactful engagement teams in providing assurance solutions in accordance with Uniform Guidance/Single Audit and Government Auditing Standards, as well as those with U.S. Department of Housing and Urban Development (HUD) and Massachusetts Uniform Financial Statement (UFR) filing requirements.

Matt serves as an active member of the firm's Innovation Assurance Committee and Community Economic Development practice. He delivers professional training on risk assessment standards, cost certification and related tax filings, job efficiency, and small business fraud risks.

mtroiano@aafcpa.com

Janice Turner is Senior Vice President of Human Resources at Mercy Housing in Denver, CO. In this role, she oversees national strategic initiatives related to human resources, talent acquisition, compensation, benefits, succession planning, leadership development, and racial equity, diversity and inclusion. Prior to Mercy Housing, she worked in executive and senior level roles in the utility, telecommunications, construction industries and post-secondary educational institutions. Janice received her Bachelor of Arts degree in Organizational Communications and Management from Creighton University, and her Master of Arts degree in Management, Human Relations, and Organizational Behavior from the University of Phoenix.

jturner@mercyhousing.org

Chuck Wall joined Renaissance 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. Wall 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. Wall 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.

cwall@rclfms.com

Chuck Wehrwein is the Chief Operating Officer and Executive Vice President for the Housing Partnership Network. In this role, Chuck oversees HPN's leadership teams and operations, as well as multifamily and homeownership enterprises and programs. 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 the 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

Kenneth D. White is vice president for resident services for The NHP Foundation and executive director of Operation Pathways, its resident services affiliate. Ken directs comprehensive programs and services for residents of affordable housing communities in 12 states and the District of Columbia. Ken holds a master's degree in educational leadership and has served as both a classroom teacher and school principal.

KWhite@operationpathways.org

Peter Zaretskiy is a Safety Services Manager at Insperity, working with Middle Market clients throughout Western Region and consults on issues related to workplace safety, loss control, and injury prevention.

Peter is a board-certified Certified Safety Professional and has been with Insperity since 2015, having previously worked in manufacturing and healthcare industries, as well as in higher education and public sector for the last 14 years.

Peter.Zaretskiy@insperity.com