# **STRENGTH**MATTERS®

# Strength Matters Virtual Financial Management Conference 2022 Biographical Sketches

**Lisa Andaleon** is Chief Financial Officer with Jamboree. Lisa oversees all aspects of financial management and strategy at Jamboree for its \$3.2 billion asset portfolio. Her financial knowledge and expertise span more than 30 years in the nonprofit and for-profit sectors.

Prior to Jamboree, she served as the Director of Operations and Finance at the University of Southern California's (USC) Stevens Center for Innovation, where she was responsible for all aspects of the \$33 million annual budget for the technology development and commercialization office of USC, a \$5.3 billion organization.

Prior to that, Lisa worked at Sanford-Burnham Medical Research Institute in La Jolla, CA, as Manager of Technology Transfer and Business Development. While there, she managed all aspects of financial planning, analysis, and budgeting, as well as contract administration and global management of more than 100 license agreements and research grants, with an annual revenue stream of approximately \$7 million.

Lisa has also consulted with the University of San Diego Nonprofit Leadership and Management Master's Program, where, among other clients, she conducted strategic planning for the Tony Hawk Foundation and a performance management audit for The Innocent Justice Foundation, which was selected for the university's International Best Practices Library. She holds a master's degree in nonprofit leadership and management from the University of San Diego and a bachelor's degree in math and economics from Claremont McKenna College.

An active volunteer, Lisa most recently served on the Board of Directors for Community Housing Works and was a mentor with the Association of University Technology Managers' Mentorship Program. Lisa's interests include meditation, yoga, sports, concerts/events, the ocean, and traveling. Relatively new to hiking, she recently hiked through eight national parks in Utah, Arizona, and California in one trip, as well as a few trails along the California Coast on a road trip with her daughter.

# landaleon@jamboreehousing.com

**Darryl Austin** is senior counsel at Goldstein Hall. Darryl concentrates his practice on the construction, rehabilitation, leasing, purchase and sale of market rate, mixed-use and rent-restricted multifamily properties. In addition, Darryl is active in the senior housing and healthcare space, including assisted living, nursing home and hospital financing.

For almost two decades, Darryl has represented developers, lenders, investors and governmental agencies engaged in economic development and community revitalization initiatives, with an expertise on the complex tax and organizational structuring of partnership syndicates utilized to facilitate historic and affordable housing tax credits.

Darryl has closed hundreds of projects financed with IRC Section 42 affordable housing and Section 47 historic tax credits which were supported by: HUD programs including RAD, Section 221(d) (new construction), Section 223 (refinancing), Section 232 (healthcare), Section 202/811 (seniors/ disabled), and Section 8 operating subsidy; tax-exempt bond financing enhanced by Fannie and Freddie; funds provided by Federal Home Loan Bank members; and state and local funds.

Prior to joining Goldstein Hall, Darryl was an attorney at a Baltimore based law firm, HUD, the New York State Housing Finance Agency and a large national developer.

daustin@goldsteinhall.com







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

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

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

# winell.belfonte@cohnreznick.com

**Tatiana Blank** is Chief Financial Officer at Eden Housing. Tatiana is responsible for corporate and real estate development accounting, finance and asset management for Eden Housing, its affiliates and ownership entities.

Tatiana works closely with the Finance and Audit Committees of the Board of Directors, and she directs and manages Eden's relationships with lending institutions, shareholders, and the financial community. Tatiana leads Eden's finance team, which oversees Eden's total assets of \$2 billion with combined annual operating revenue of more than \$175 million.

Prior to transitioning to this role, Tatiana was Eden's Vice President of Portfolio Finance and Asset Management, in which she ensured that all properties within Eden Housing's portfolio maintain a strong financial position, comply with all contractual, regulatory, and statutory requirements, and full all internal and external reporting requirements in an accurate and timely manner.

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

Tatiana received her degree in business administration with a concentration in accounting from San Francisco State University.

#### tatiana.blank@edenhousing.org

Andre Brickhouse, Senior Financial Management Consultant, is a CPA and a Certified Financial Planner with over 25 years of accounting, auditing, and financial management experience. Andre has successfully demonstrated financial management compliance and oversight acumen over the last 17 years by evaluating recipients' ability to manage and implement financial requirements pertaining to the administration of federal awards. Over this period, Andre successfully evaluated and implemented best practices for financial management of various recipients' pre-existing internal control structure and policies and procedures for grant administration, performed financial audits, and conducted reviews for compliance and regulations concerns. Andre has also conducted financial and performance reviews designed to evaluate the recipients' financial capacity to adhere to cost principles and audit requirements of *2 CFR Part 200 Uniform Administrative Requirements Cost Principles and Audit Requirements for Federal Awards*.

abrickhouse@corporatefacts.net

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

Corporate F.A.C.T.S. is a strategic planning and financial advisory firm helping clients build strong, vibrant communities. The firm specializes in strategic planning, financial management and providing outsourced accounting services to the CDC industry.

Corporate F.A.C.T.S. has deep roots in the community development industry, working to build capacity and effectiveness among practitioners and introduce innovative strategies for building wealth and advancing racial equity in low- and moderate-income communities. Corporate F.A.C.T.S. has helped a number of community development corporations invest and leverage federal resources through strategic community and economic development related initiatives.

#### mbush@corporatefacts.net

**Michael Butchko** is the vice president of Business Intelligence at NeighborWorks America, providing NeighborWorks America and the NeighborWorks network with cutting-edge technology and data visualization experts to communicate national and local impact. This million-dollar, enterprise-wide technology endeavor is an example of his commitment to gathering and incorporating stakeholder feedback and entrepreneurship and making complex technology accessible to diverse organizations. He also partnered with Tableau (a world-renowned interactive data visualization software company) on the NeighborWorks Tableau Fellowship, a first of its kind capacity building initiative to advance the analytical capacity and culture of the NeighborWorks network.

Since Michael joined the NeighborWorks team in 2000, he's proven himself as a programs expert with experience leading and collaborating on initiatives across every NeighborWorks division. Passionate about strengthening the capacity of the network, he also volunteered as an Excellence in Governance board coach from 2013-2018 and was consistently recognized as a top-rated coach by each of the three nonprofits that he mentored, with board members and CEOs citing his critical thinking and leadership abilities.

Michael holds a Bachelor of Arts in Political Science from Wilkes University. He also holds a Master of Science in Public Policy Analysis from the University of Rochester, where he worked with a local community foundation to build a structure to measure its impact and recommended these proposed changes to the foundation's management and board of directors. Michael actively supports community access to local food by hosting a neighborhood farm drop and working with local mission-driven nonprofits providing services to underserved residents.

mbutchko@nw.org

**Agnes Casimir** is Chief Financial Officer with Atlanta Neighborhood Development Partnership, Inc. Agnes has been with ANDP since April, 2001. She earned her Bachelor of Arts degree from the University of the Virgin Islands, in St. Thomas, US Virgin Islands. She is also a Certified Public Accountant and a member of the American Institute of Certified Public Accountants.

In her role as Chief Financial Officer, Agnes oversees the Accounting Department of ANDP. Agnes brings to ANDP 30 years of accounting experience from both the for-profit and non-profit sector. Prior to joining ANDP, she held various accounting positions while employed with American Express, The Arthritis Foundation and London International. She is a former board member for The Center for Working Families, and a current member of the Finance Council for St. John the Evangelist Catholic Church.

#### acasimir@andpi.org

**Eric Chatman,** Chief Financial Officer, Housing Partnership Network, has a diversified background in senior level finance and general management roles at quasi-public and private sectors domestically and internationally. His experience includes corporate finance, capital markets, affordable housing finance, and strategy. Prior to joining Housing Partnership Network in July 2017 as Chief Financial Officer, Eric was President of The Chatman Group, LLC, a consulting and financial strategy firm whose clients include non-profits, financial institutions, and government agencies.

Skilled at change management, Eric led the Connecticut Housing Finance Authority while President and Executive Director to develop, execute strategy, and implement process improvements which led to record levels of production. He also helped the Iowa Finance Authority navigate through the financial crisis by diversifying funding sources and introducing new funding strategies to enable the authority to continue to operate and grow its programs in his role as Deputy Director and Chief Financial Officer. Eric also served as Vice-President and Treasurer of the Federal Home Loan Bank of Des Moines and Bank Treasurer and Head of Finance for the Retail Segment of CIGNA Retirement (now Prudential Retirement) where he helped grow CIGNA Bank & Trust from \$40 to \$200 million in assets. Eric also spent several years working in West Africa as Division Manager in the treasury department at African Development Bank (ADB) in Abidjan, Cote D'Ivoire and Vice-President, Corporate Finance at Databank Financial Services in Accra, Ghana. He began his career at Federal Reserve Bank of New York.

Eric serves on the Board of Directors of the Federal Home Loan Bank of Boston; the New England Center and Home for Veterans; the Board of Managers of the National Community Stabilization Trust; and Board of Advisors for the Elliott School of International Affairs at The George Washington University. He has recently served on the boards of reSET Social Enterprise Trust, a non-profit organization whose mission is to advance the social enterprise sector and Plan International USA, an international non-profit organization focused on child centered community development active in over 50 developing countries. Other past board service includes being on the boards of Oakridge Neighborhood Services in Des Moines Iowa, YMCA of Greater Des Moines, and Boy and Girls Club of Hartford.

Eric earned his MBA in Finance and Economics from the University of Chicago Booth School of Business, an MA in International Affairs from the Elliott School of International Affairs at George Washington University, and his BA in Economics from Tufts University.

chatman@housingpartnership.net

**Chris Cherry** is Chief Financial Officer at Wesley Housing. Chris is responsible for all accounting, asset management, payroll and administration functions at Wesley Housing. 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 13 years, following 17 years in public accounting. He is a member of several industry associations including Strength Matters<sup>®</sup> 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

**Dana Chestnut** is Chief Lending Officer at Community Housing Capital. Dana is an executive leader directly involved with all sales and business development functions. In his role as Chief Lending Officer, Dana is an executive leader of sales, marketing, and business development; responsible for developing and executing a comprehensive Business Development strategy to realize loan growth, community impact, and organizational sustainability. Accountabilities include sustainable growth, acceptable risk, and enhancement of CHC's brand.

Previously, Dana served as First Vice President for SunTrust Bank Community Development Lending, one of the nation's leading financial services companies with a solid commitment to building strong communities by helping to create successful developments in low-to-moderate income neighborhoods. Primary responsibility was to expand the Banks' lending platform throughout the Southeast market by maintaining and expanding existing relationships while strategically identifying prospects for expansion.

Dana has also served as First Vice President and Southeast Regional Manager of Community Development Banking for Washington Mutual Bank, where he was responsible for oversight of all sales and business development functions, including sales and deposit generation. Provided team training, coaching, and mentoring to a group of 8 associates located in Atlanta, Orlando, and Miami.

Dana has more than 25 years of development and finance experience in the affordable housing sector. He has been directly responsible for the financing and or underwriting of over \$5 Billion of development projects with a significant emphasis on affordable housing, tax-exempt bond financing, and new market tax credits. Dana worked twenty-two years in the banking sector with his most recent experience as First Vice President for SunTrust Community Capital.

Dana holds a Bachelor of Arts, degree in Economics, from the Florida Agricultural and Mechanical University, Tallahassee, Florida.

dchestnut@communityhousingcapital.org

**Grace Chionuma** is a Managing Director at Morgan Stanley. She is the Co-Head of the Affordable Housing and Community Development Finance Group within Public Finance Banking and a member of the Municipal Securities Operating Committee. She leads Morgan Stanley's capital markets coverage of CDFIs, Affordable Housing Developers (AHD), and Charter Schools. Grace has been a banker at Morgan Stanley for 16 years and has considerable experience in public finance, corporate finance, and sales & trading.

Grace served as the lead banker for the Local Initiatives Support Corporation (LISC) debt IPO in 2017, the inaugural CDFI sector public capital market debt offering. Since then, she has led several CDFI debt IPOs including bond issuances for Enterprise Community Loan Fund (ECLF), Low Income Investment Fund (LIIF), and BlueHub Loan Fund. In Q4 2020, Grace led the non-profit AHD sector debt IPO for corporate level general obligation bonds with the BRIDGE Housing Social Bond issuance. In 2022, Grace led National CORE's inaugural Social Bond issuance and Preservation of Affordable Housing's inaugural Sustainability Bond issuance. Grace has worked with Freddie Mac on affordable housing securitizations including a MTEBs (Multifamily Tax-Exempt Bond Securitization) transaction with BRIDGE Housing assets and Freddie Mac's first issuance under its Social Bond Framework which financed affordable housing loans of Impact Community Capital CDFI.

In addition, Grace has worked with foundations including the Ford Foundation and the MacArthur Foundation to raise capital from institutional investors to increase grants during the COVID-19 and related economic crises. Within the public sector, Grace also covers several large U.S. cities, including New York City and Washington D.C. in addition to the States of New Jersey and Connecticut.

Grace serves on the board of several high-impact nonprofit corporations which work to empower underserved communities and populations including Momentus (Capital Impact Partners and CDC Small Business Finance), NeighborWorks Capital, and Project Renewal.

Grace earned her B.A. at Dartmouth College, completing majors in both Government and Philosophy; and she earned her M.B.A. at Yale University School of Management. She lives in New York City in a bustling, multi-generational household.

#### grace.chionuma@morganstanley.com

**Lisa Deller** is Vice President, Asset Management and Housing Programs for National Equity Fund (NEF). Lisa oversees Year 15 portfolio dispositions in New York and was one of the first to identify the need for training and technical assistance in this area. She has spoken frequently at conferences and was a contributing author to LISC's disposition handbook. Lisa brings more than 25 years' experience in property and asset management. She is Vice Chair of the Consortium for Housing and Asset Management (CHAM). and holds the CPM® designation from the Institute if Real Estate Management, she has a master's degree in City Planning from Boston University and serves as Land Use Committee Chair for her local Community Board in Queens, NY.

lisadeller@nefinc.org

**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

**Kemba Esmond,** Executive Vice President and Chief Financial Officer, comes to NeighborWorks America following a career that has spanned four industries. She started her career at a nonprofit publishing association, where she worked across all areas of accounting, auditing and finance and rose to Assistance Controller. She then accepted an opportunity to lead the business operations of a new city government agency in Philadelphia for the Office of the Mayor. After spending four years building out the agency, leading strategic planning and efforts to raise more than \$20 million in support of initiatives, she transitioned to the corporate sphere.

At JPMorgan Chase, Esmond focused on modeling credit risk for a \$153 billion portfolio and led the financial analytics behind the launch of the Chase Ink Business Card. She then transitioned to Fannie Mae, where she reduced credit losses on a \$2.3 trillion portfolio following the 2008 financial crisis. This included credit risk management, performance monitoring and reporting, forecasting and analytics, people development, building out new capabilities, and supporting loss mitigation efforts within the single-family business.

Esmond completed her undergraduate work at Oakwood University earning a Bachelor of Science in accounting and went on to earn a Master of Business Administration from Pittsburg State University. She holds the professional designation of Certified Public Accountant and believes in the mission of NeighborWorks America to revitalize communities.

#### kesmond@nw.org

**Travis L. Gordon** is Chief Financial Officer with Avenue. Travis joined Avenue in 2018. As the CFO, 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 Director, Real Estate Enterprise Strategies at NeighborWorks America. Her responsibilities include peer learning and technical assistance to support sustainable business practices and enterprise-level growth. As NeighborWorks America representative, Angela is a managing member of Strength Matters, guiding the programming and direction of Strength Matters in collaboration with Housing Partnership Network and Stewards of Affordable Housing for the Future. 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 rental housing developers 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

**Cindy Holler** is President and CEO of Community Housing Capital. Cindy brings 30+ years of strong leadership qualities and extensive experience to the housing and community development field. She has deep experience in capital aggregation, real estate lending, credit risk management, and real estate development in both the non-profit and for-profit sector with organizations that include Mercy Housing, Fannie Mae, and South Shore Bank. In these roles, she has directed or financed the development of over 10,000 units of housing, infrastructure and community facilities across the U.S., making significant impact in local neighborhoods and regional markets.

#### choller@communityhousingcapital.org

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

Caroline is also an active leader in the nonprofit affordable housing industry. Since 2007, Caroline has been a member of the STRENGTH MATTERS<sup>™</sup> CFO Working Group which has developed a series of white papers on external reporting best practices for the nonprofit affordable housing industry. She is on the board of directors of NeighborWorks Capital, a lender to the NeighborWorks network. Caroline also presents on a variety of conference panels, using her skills and knowledge wherever she can to improve not just the work of Aeon, but to all organizations in the industry. Caroline earned her BSBA in accounting from Boston University School of Management. She was recognized as one of the Top Women in Finance by Finance & Commerce.

Aeon is a nonprofit developer, owner and manager of quality affordable apartments and townhomes which serve over 17,000 people annually in the Twin Cities area. Since 1986, Aeon has been committed to helping people create homes where they feel safe and connected to the community around them. We believe that home changes everything. For more information, visit <u>aeon.org</u> or follow us on <u>Twitter</u> and <u>Facebook</u>.

#### chorton@aeon.org

**Brian Kay** is a Certified Public Accountant with over twenty years of combined public and private accounting and finance experience. Since 2012, Brian serves as Chief Financial Officer of Community HousingWorks, a statewide, multifamily affordable housing developer, owner and service provider. Brian's career highlights include leadership positions within several diverse San Diego companies. Previously with Five Point Capital, Inc., he completed a loss to profit turnaround story culminating in an owner-acquisition. Brian also led the sell-side financial aspect of local security software company Anonymizer, Inc. to Abraxas Corporation at a multiple of over 16X's EBITDA. While at Provide Commerce, (formerly Proflowers), he managed growth from start up to over \$100 million annual sales and played a key role in the company's successful initial public offering (IPO). Brian holds a BA in Economics and Business from Westmont College in Santa Barbara, CA.

## bkay@chworks.org

**Karen Kent,** CPA is a partner with CohnReznick. She has more than 25 years of experience providing services to a broad range of clients including community development corporations, both for-profit and not-for-profit developers, management companies and social service agencies. Her experience comes in the areas of audit, accounting, and business advisory services serving numerous clients in the not-for-profit and affordable housing industries. Karen provides accounting, auditing and management consulting services, including audits conducted in accordance with Government Auditing Standards, OMB Uniform Guidance, Low Income Housing Tax Credit Program, Massachusetts UFR requirements and HUD and state regulatory requirements. Her business advisory expertise includes strategic planning, regulatory compliance, cost allocation plans, accounting system design and board governance matters. Karen lives with her husband in southeastern Massachusetts and enjoys family time with her children and grandchildren as well as hiking and enjoying the outdoors.

#### Karen.Kent@cohnreznick.com

**Nathan Kerr** is Vice President and Branch Leader of Scott 's Roanoke, Virginia office. Nathan began his career with Scott in 2000 and started their Knoxville, Tennessee office in 2001 as a Commercial Risk Advisor. In 2011, Nathan became the Branch Leader of the Roanoke, VA office and leads the Affordable Housing Practice Group for Scott Insurance.

As a Risk Advisor for Scott, Nathan provides the following:

- Provides commercial insurance coverage analysis and client education
- Serves as advisor and advocate to clients to help them improve their risk performance
- Serves as a strategic advisor on alternative risk financing and risk capital management
- Helps clients focus on their risk awareness and proactively manage risk to its lowest level

Nathan serves on Scott Insurance's Senior Leadership Team and Board of Directors as well as on the boards of civic organizations. Nathan currently serves as Chair of the Jefferson Center Foundation, is on the vestry for Church of the Holy Spirit, and serves on the board of Greater Roanoke Valley Development Foundation. He previously served as the Chair of the Roanoke Regional Chamber of Commerce, President of the Roanoke Rescue Mission Foundation, Business Leadership Fund, Restoration Housing, and on the board of the Shenandoah Club.

#### nkerr@scottins.com

**Kevin Krejci** is Chief Capitalization Officer with Gulf Coast Housing Partnership. Kevin joined GCHP in November 2015. Prior to working with GCHP, Kevin served as the Deputy Director and Interim Executive Director for 9 years with Project Homecoming, Inc., a non-profit rebuilding agency born out of post-Katrina rebuilding efforts. Kevin created and oversaw programs that expanded Project Homecoming's impact into homeownership creation, workforce development, historic renovation, youth vocational training and affordable rental development. In his tenure, Project Homecoming rebuilt over 250 homes for low-income families throughout the New Orleans area.

Prior to working with Project Homecoming, Kevin was a member of a construction contract administration team with Studio Meng Strazzara, a Seattle-based architecture firm specializing in construction of educational facilities.

Previously, Kevin also worked with the Wagner Foundation, a philanthropic foundation focused on reducing recidivism rates in Belize. He managed Belize's prison computer networks and implemented computer education programs for inmates as a part of their rehabilitation program.

Kevin is a licensed general contractor in the State of Louisiana. He holds a BS in Computer Science from Marquette University, a Graduate Certificate in Construction Management from University of Washington, and an MBA and MS in Finance from Tulane University.

# krejci@gchp.net

**Michael Lear** is Chief Business Development Officer with The Community Development Trust (CDT). Michael is a key member of the management team and manages all aspects of CDT's equity investment activities. He and his team identify and execute CDT's investment in acquisitions of affordable housing properties throughout the country.

Michael is also responsible for growing the equity business through new strategic initiatives and programs. He identifies and executes new partnerships and structures to broaden CDT's investments in affordable housing and develops external relationships to support CDT's growth.

Michael has been with CDT since 2011 with experience in both the Asset Management and Equity departments. He has spent his entire career in the field of affordable housing policy, development, and finance.

Prior to joining CDT, Michael served as Deputy Director of Housing Policy Research at the New York City Department of Housing Preservation and Development. Michael holds a Master's in Urban Planning from NYU Wagner and a Bachelor of Science and Engineering in Materials Science Engineering from the University of Michigan. He previously taught Real Estate Finance at NYU Wagner.

#### mlear@cdt.biz

**Lori Little** serves as the President and CEO in National Affordable Housing Trust's history. Ms. Little is an experienced affordable housing professional with more than 25 years of leadership experience in real estate and finance. She joined NAHT in 2002 and has held numerous syndication roles and led the Originations and Syndication teams. She also worked with the team to negotiate and place more than \$1.7 billion in investor equity. During the Pandemic, Lori led the NAHT team through a restructuring of the company resulting in a joint venture with the Low Income Investment Fund (LIIF) and Stewards of Affordable Housing for the Future (SAHF) effective October 1, 2020. Prior to joining NAHT, Lori served as Vice President of Operations for JPMorgan Chase. She has also held positions at Associates Financial Services of North America and Blalack & Williams, LLP. Lori holds a JD from Baylor School of Law and received a BA from Abilene Christian University. She currently serves on the Board of Directors of Volunteers of America of Texas, Retirement Housing Charitable Foundation and Ohio Women's Affordable Housing Network.

llittle@naht.org

**Mark Meier** is Chief Financial Officer at Develop Detroit. Mark joined DDI in April 2020 after serving for eight years as CFO of Montgomery Housing Partnership, an HPN member based in Maryland with over \$250 million in total assets. He is DDI's first on-staff CFO, as the function had been previously filled by HPN's CFO. In his prior role, Mark was responsible for raising public and private capital for LIHTC projects at the sponsor and project level. Mark directs DDI's financial management, compliance, and accounting functions. He also plays an active role in building and managing relations with investors and lenders. He has over 21 years of experience in real estate finance. His areas of expertise include investor and lender relations, budgeting, cash flow analysis, and financial reporting. Mark also has extensive experience in non-profit, corporate and partnership taxation. Mark is a Certified Public Accountant.

## mark@developdetroit.org

**Michelle Minter** has over 24 years of accounting, corporate and non-profit experience and provides a range of financial management services to our clients in the non-profit arena. Michelle has helped numerous other non-profit and for profit organizations in a variety of financial capacities. Since joining Corporate F.A.C.T.S. in 2010, Michelle has used her expertise to help develop a firm financial structure for some of our Community Development Corporation clients. Prior to joining Corporate F.A.C.T.S., Michelle worked for ten years with the Northwest Detroit Neighborhood Development CDC as their Chief Financial Officer. Her previous work engagements included Finance Director, Controller and AP/AR clerk for various companies such as the Parade Company/Michigan Thanksgiving Parade Foundation, Stinson Funeral Home, Fox 2, Ford Motor Credit Company, Eric Canvasser CPA, and Conrail to name a few.

Michelle earned a Bachelor of Business Administration (BBA) from Western Michigan University and received her master's in accounting from Walsh College.

#### mminter@corporatefacts.net

**Jeffrey Moline** is Vice President-Controller with Eden Housing. Jeff oversees all the activities of Eden's corporate, development, and property management accounting departments including budgeting, monthly financial statements, annual audit, tax returns, development cost accounting, accounts payable, and treasury functions. He oversees more than 30 staff members who support Eden's accounting and finance functions and is a member of Eden's Extended Leadership Team (ELT).

Jeff joined Eden in July of 2021, after most recently serving as Chief Financial Officer/Chief Operating Officer at Finn Capital in San Mateo, where he directed Accounting, Human Resources, Information Technology, and Asset Management encompassing Controllership, Property Management, and Family Office. Previously, he served as Chief Financial Officer at Burbank Housing in Santa Rosa, and Controller at East Bay Asian Local Development Corporation in Oakland.

Jeff brings to Eden more than 12 years of robust experience in finance, accounting, and affordable housing financial management. In his role at Eden Housing, he provides meaningful and accurate financial information for all Eden entities to help guide internal and external decision-making. He also works across departments to provide leadership and support to ensure organizational goals are effectively planned and implemented.

Jeff earned his Bachelor of Science degree in Business Administration at the University of South Dakota and is also a Certified Public Accountant and Certified Valuation Analyst.

jeff.moline@edenhousing.org

**Dana Moore** is Chief Financial Officer with NeighborWorks Capital. Dana joins the senior management team with over 25 years' experience in single and multifamily finance and asset management. She oversees financial and investor reporting, financial projections, and capital raising. She is also principal of Compass Advisors, a woman owned federal government contractor, that includes financing strategies and counterparty risk assessment. Recent clients include CDFIs, nonprofit affordable housing organizations, foundations and intermediaries. Previously she was Senior Vice President and Chief Credit Officer at Fannie Mae with oversight of its \$138 billion multifamily debt and LIHTC portfolio. Earlier in her career she held Credit Officer positions at Bank of America and its predecessor Nations Bank for its multifamily and single-family lending programs. She has an undergraduate degree in Economics from Dickinson College, a Certificate of Accounting from University of Baltimore and a Masters Degree in Real Estate from Johns Hopkins University.

#### dmoore@neighborworkscapital.org

**Manuel Muelle** is VP Membership & International Exchange at Housing Partnership Network. Manuel is responsible for the Network's membership meetings, member services, expanding peer exchange efforts, and the International Housing Partnership, a collaborative of Network members and leading affordable housing organizations in the United Kingdom, Canada and Australia. Prior to joining the Network staff in 1999, Manuel was director of community development at the Metropolitan Boston Housing Partnership (MBHP), where he was in charge of homeownership, resident resources and homeless assistance programs.

Among other areas of responsibility at MBHP, from 1994 to 1997 Manuel managed planning and administrative services for the National Association of Housing Partnerships - which later became the Housing Partnership Network - and developed and administered the Housing Counseling Program. He also worked in real estate marketing and business development in Lisbon, Portugal for seven years before returning to the United States in 1987 and beginning his nonprofit housing career.

Manuel completed his undergraduate studies at Saint Louis University and the Universidad Complutense de Madrid, majoring in Political Science and Spanish Literature, and has done professional coursework in property management and real estate development finance.

#### muelle@housingpartnership.net

**Austin Nedderman** is an audit senior manager for Dauby O'Connor & Zaleski, LLC, and has been in the practice of public accounting since 2014, specializing in the real estate industry for his entire career. He has considerable experience in the affordable housing arena, with focuses on real estate developments that utilize LIHTC equity, HUD financing/mortgage insurance and rental assistance, and RD or other agency financing and rental assistance. Austin's portfolio of clients includes not-for-profit corporations, real estate developers, real estate limited partnerships, tax credit syndicators, and property management organizations, among others.

#### anedderman@dozllc.com

**Lisa L. Nelson** is owner of Focus & Flow Consulting and Coaching. As a student attending the University of Michigan's business school in the late 90s, Lisa already knew her purpose: creating a better world through strengthening businesses with a mission. Following her early years in corporate finance at Electronic Art, Lisa obtained a Master's degree in Community and Regional Development at UC Davis to improve her effectiveness in helping social enterprises develop, expand, and sustain their values. Impatient to be of use, Lisa co-founded Alchemist CDC while in graduate school, inspired by their mission to support area residents in their efforts to create vibrant, equitable, healthy and diverse communities. Alchemist continues to serve the region as a leader in food access and grassroots community development. Following graduate school, Lisa honed her finance, management and board development skills as the CFO of Mutual Housing California, a Sacramento-region affordable housing developer. In 2014, Lisa started Focus and Flow, a community development consulting firm, to expand her impact nationwide, working with nonprofits and for-profits with a social purpose. Lisa contributes a unique blend of financial expertise, strategic planning, data visualization, delivered with competence and compassion.

# Lisa@focus-flow.com

**John Peavy** is with Fifth Ward Community Redevelopment Corporation. John is a mission-oriented, results-driven accounting professional. He has a broad range of experience as chief financial officer, investment banker and corporate finance professional. John is committed to understanding the full picture, knowing the organization's goals and delivering insights to help businesses succeed. He has extensive experience preparing and reviewing financial statements, providing guidance for accurate accounting and financial reporting and making process improvement recommendations.

After graduating from Howard University with an BBA in Accounting, John worked as an energy investment banker for Credit Suisse and Citigroup, where he focused on helping clients devise growth strategies and understand the financial impact of mergers and acquisitions. John broadened his education by successfully pursing a JD from the University of Texas School of Law. He has also served as an Assistant Treasurer for DTE Energy, and the head of Upstream Commercial Finance for Royal Dutch Shell in the Americas and Europe, focused on growth through mergers and acquisitions. Prior to joining the Fifth Ward CRC, John was an associate at Your Part-Time Controller. He currently sits on the boards of Yellowstone College Prep and the Community Artists' Collective.

#### peavy.john@fifthwardcrc.org

**Steve Peelor** is Chief Lending Officer at NeighborWorks Capital. Steve has more than 20 years' experience in affordable housing finance and nonprofit management. He joined NeighborWorks Capital as Senior Loan Officer in 2016 and was promoted to Chief Lending Officer in 2017. Previously Steve was principal of Stage 11 Consulting, engaged as Chief Operating Officer to transition a national nonprofit from start-up to sustainable operations. Previously, during his 13-year tenure at Century Housing, Steve tripled loan originations as of Director of Structured Finance, SVP of Lending, and SVP of Strategy. Prior to that he worked at City National Bank in Los Angeles as a Credit Analyst. Steve earned a BA and MPA from New York University, and is proud veteran of the US Navy.

speelor@neighborworkscapital.org

**Kelly Perlman** is a partner at Plante Moran with over 18 years of experience. Kelly provides a variety of accounting and auditing services to clients in the housing and community development, real estate, and construction industries. As the leader of Real Estate and Construction industry for the Ohio region, Kelly specializes in HUD financing and low-income housing tax credits and frequently work with owners, developers, and management companies. Most of Kelly's work is on large multi-entity engagements where she advise my clients on operational efficiency and improving internal controls.

Because of my technical real estate experience, Kelly is a member of the firm's professional standards team, which provides staff and clients with guidance and information on new and proposed financial statement reporting standards.

# kelly.perlman@plantemoran.com

**Andrea Ponsor** is the President and CEO of Stewards of Affordable Housing for the Future (SAHF) where she works to identify, develop and advocate for key strategic issues of concern to SAHF and its members, create a level playing field for effective, mission oriented nonprofit businesses and amplify SAHF's impact to create more sustainable properties and communities and improve the lives of residents. Andrea joined SAHF in 2016 as Executive Vice President of Policy, bringing with her 15 years of experience in the field of housing and community development.

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 O'Leary, 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.

#### aponsor@sahfnet.org

**Tracy Pride** is SVP, Director of Client Services with IMA. With both insurance company and broker experience, Tracy has over 35 years in the insurance industry and has spent the last 22 years at IMA. Specializing in the Affordable Housing Developer/Owners Estate industry niche, Tracy has worked with the Housing Partnership Network sponsored insurance captive for Property, General Liability and Workers Compensation captive for the last 16 years.

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

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

#### tracy.pride@imacorp.com

**Shaun Rai** is Vice President of Asset Management at Community Housing Partners. Shaun is responsible for the long-term physical and financial sustainability of CHP's multifamily portfolio. He oversees the Asset Management division, which includes the Compliance department, and works to preserve the tax benefits and protect the quality of CHP's rental communities over the life of the investment. Shaun joined CHP as Senior Asset Manager in 2017 before being promoted to his current position in 2020. He previously worked for eight years as a real estate lender with Virginia Community Capital, a Christiansburg-based nonprofit CDFI which supports housing and community development ventures. Prior to that, Shaun worked in retail banking at BB&T for seven years.

#### srai@chpc2.org

Jeniffer M. Reid is Controller with One Neighborhood Builders. Jeniffer brings more than 20 years of progressive accounting experience in the for-profit and nonprofit sectors. She is originally from the beautiful twin islands of Trinidad & Tobago, but now calls Rhode Island her home. Jeniffer is currently a small business owner and is a very active leader in her church community. Jeniffer received her bachelor of science in business with a concentration in accounting from the University of Phoenix.

#### reid@onenb.org

**Arif Rizvi** is Senior Vice President and Chief Financial Officer of Community Housing Capital. Arif is responsible for the development and implementation of financial risk management systems and controls, capital raising and treasury management, credit quality oversight and general operations and administration management. Prior to Community Housing Capital, Arif served as Chief Financial Officer and Chief Operating Officer for Enclude (formerly ShoreBank International). Before joining ShoreBank, Arif worked for ABN AMRO as Vice President, across three continents. At ABN AMRO he implemented Sarbanes Oxley globally and set up a shared services company for centralized operations. Arif has a professional background in Finance and a Bachelors in Commerce.

#### arizvi@communityhousingcapital.org

**Brian Robinson** is Senior Vice President, Originations & Capital Markets with National Affordable Housing Trust (NAHT). With nearly 20 years of prior experience serving the affordable housing industry, Brian specializes in working with investors, lenders, local/state agencies and developers, including for-profit, not-for-profit and public housing agencies. He is well versed in structuring affordable housing transactions, and has a wide range of experience with owners and investors. He has provided his skills to a variety of project types, and has experience in such capacities as affordable housing development, fund management, HFA underwriting, and investment banking.

Prior to joining NAHT, Brian served as Senior Managing Director at Baker Tilly, where he was responsible for offering real estate development consulting services to for-profit and non-profit developers, and public housing authorities.

Brian holds a bachelor's degree in Business Administration from Loyola University of Chicago and a master's degree in Urban and Regional Planning from the University of Michigan. He served as a volunteer in the U.S. Peace Corps and has been involved with numerous philanthropic organizations, either in a volunteer or Board of Director capacity. He currently serves on the board as Vice-Chair of Capital for Change, a CDFI entity based in Connecticut.

#### brobinson@naht.org

Adalia Rodriguez joined East LA Community Corporation in 2018 as Vice President of Human Capital and COO. She oversees and provides direction to ELACC's programming as it pertains to professional, programmatic, and campaign development. Adalia came to ELACC with nearly 15 years of experience in office management, including over a decade working at Enterprise Community Partners, bringing with her the capacity to effectively carry out multiple projects simultaneously. She has been instrumental in maintaining stable and efficient operations by improving our everyday processes and procedures, and implementing systems for ongoing assessment and evaluation. Adalia received her BS from California State University, San Bernardino.

arodriguez@elacc.org

**Alex Santiago** is a member of AAFCPAs' Business Process & IT Consulting Practice, responsible for providing information risk management, cybersecurity, and special IT attestation solutions. As a key member of AAFCPAs' IT Security team, Alex helps clients identify risks from the use of technology that could potentially cause information loss or financial or reputational harm. He performs vulnerability and penetration tests, phishing campaigns using social engineering, configuration assessments, and evaluates infrastructure operations & regulatory compliance.

He assists AAFCPAs' financial statement audit teams in executing IT General Controls Audits, including assessing software controls, physical hardware controls, computer operations controls, data security controls, controls over the systems implementation process, and administrative controls. He leverages the insight gained from these assessments to provide suggestions for system security, data privacy, or system integrations that enhance efficiency.

Prior to joining AAFCPAs, Alex gained 10+ years of hands-on experience in IT services as well as 11 years of experience as an Application Administrator/Staff Sergeant in the US Marine Corps.

*Education*: Northeastern University – Graduate Certificate, Information Security Management; Post University – Bachelor of Science, Computer Information System

#### asantiago@aafcpa.com

**Valorie Schwarzmann** is the Chief Financial Officer and Senior VP of Program Operations for Columbus Housing Partnership, Inc. dba Homeport, located in Columbus, Ohio. Her responsibilities include oversight of (1) financial reporting, planning, and strategizing for Homeport and its related affiliates; (2) compliance management; (3) operations of Resident Services and Housing Advisory Services; and (4) 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, she 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 tax 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 and is currently working on completing her Certified Housing Asset Manager (CHAM) designation through NeighborWorks America.

valorie.schwarzmann@homeportohio.org

**Kelly Shiflett** is Senior Vice President and Chief Financial Officer of the Community Development division of Enterprise Community Partners. She is responsible for the overall capital structure for the organization. As CFO, she manages the financial systems, processes and controls, oversees all financial and operational aspects and initiatives, and is a lead support on the management team in evaluating strategic and operational opportunities and risks. She manages the finance department including the corporate, development accounting and property management accounting teams.

With over 25 years of experience in finance, Kelly has a strong and diverse background. Before joining Enterprise, she served as vice president of finance and treasurer for Washington Real Estate Investment Trust (REIT). During her tenure with the company, Kelly developed and managed a three-year rolling enterprise model for tracking financial performance and significant metrics of the company and its portfolios. She also raised \$1 billion of equity and \$1.5 billion of debt financing.

Prior to that, Kelly was lead analyst, listing qualifications with the NASDAQ Stock Market, Inc. and Ioan officer with FNMC – The Mortgage Company.

Kelly holds a bachelor of science in business and management from Wake Forest University and a master of business administration in finance and entrepreneurship from the University of Maryland, College Park. She is a CFA<sup>®</sup> charterholder.

# kshiflett@ecdcommunities.org

**Rodney Sommers,** CPA is a principal in the Dover, Ohio, office of Novogradac. Mr. Sommers has more than 30 years of experience with a strong emphasis on audit, specifically for nonprofit and real estate entities. His experience in the real estate industry has emphasized affordable housing developments, including those subject to the auditing requirements of the U.S. Department of Housing and Urban Development, and nonprofit organizations, including those subject to government auditing standards and OMB Uniform Guidance. He also has experience in a variety of other industries including renewable energy tax credit, low-income housing tax credit entities, upper-tier tax credit funds, real estate developers and tax credit syndicators. He graduated from Kent State University and is a member of the American Institute of Certified Public Accountants. Mr. Sommers is licensed in Ohio as a certified public accountant. He resides in Dover with his wife, Lisa, and their five pugs and has three adult children.

Rodney.Sommers@novoco.com

**L. Steven Spears** comes to the National Housing Trust with more than 30 years of experience in financial services. Spears is serving as Interim Chief Financial Officer and is responsible for day-to-day financial services supporting NHT and its affiliates. He is also responsible for ensuring the integrity of financial reports and strategic financial planning for NHT, as well as playing a role in setting the overall strategic direction for the organization and assuring the long-term financial sustainability and growth of NHT.

Most recently, Spears served as Senior Vice President and Chief Financial Officer for Mercy Housing, Inc a nonprofit affordable housing developer, owner and operator based in Denver, CO. Prior to joining Mercy, he 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, Spears 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.

Spears 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 40 years. He currently serves on the Board of Directors of the Housing Partnership Equity Trust in Washington, DC and serves on the Audit and Finance Committee of The Community Builders in Boston, Massachusetts.

#### sspears@nhtinc.org

Lance Sutherland is the Chief Financial Officer and Executive Vice President at Community Housing Partners, based in Christiansburg, Virginia. CHP owns or manages 6,500+ units and 100+ properties across 6 states in the Mid-Atlantic, with business lines that include real estate development, construction, weatherization and energy efficiency services, asset management, property management, homeownership services and comprehensive resident services. Lance has served in various positions in CHP's complex and expansive accounting & finance division across his 12 years with the organization, with 16+ years of experience in the accounting and finance related fields. Prior to joining CHP, he worked the defense and aerospace industry at ITT Corporation, where he gained expertise in financial analysis, strategic planning, cost and project accounting as well as ERP system design and process improvement. At CHP, Lance oversees accounting and financial operations for all business lines and support services functions, as well as the procurement and business administration departments. As part of the executive team, Lance's role is to ensure CHP maintains the proper balance between delivering on its mission and maintaining financial stability for overall long-term success of the organization. He holds a BS in Business Administration with a major in Accounting and an MBA from Radford University. Lance is licensed as a Certified Public Accountant (CPA) in the state of Virginia, and holds the Certified Housing Asset Manager (CHAM) designation.

lsutherland@chpc2.org

Len Tatem, the Principal of Tatem Consulting LLC, is a real estate finance and asset management consultant for organizations nationwide. He has spent more than 30 years in the field of real estate and investments. His current focus is "NEXT GENERATION COACHING" which helps develop the affordable housing leaders of tomorrow. He emphasizes the best practices of business and portfolio sustainability analysis, property and portfolio repositioning, investor exits and maximizing performance through green and sustainable design, capital planning, innovative marketing, rehabilitation and debt restructuring. Prior to being a consultant, Len was the Director of Finance for Harvard University's Real Estate Corporation overseeing a non-academic portfolio valued at over \$2 billion including market rate, rent controlled and subsidized housing, hotels, warehouse, retail space and office buildings. In addition to having a Master's Degree concentrating in Administration, Planning and Social Policy from Harvard University, Len has a Bachelor's Degree concentrating in Finance from the University of Rhode Island. Tatem Consulting is a member of the USGBC. Len is also faculty for NeighborWorks<sup>®</sup> America Training Institutes and National Real Estate clinics. Recent honors for Len include being named the Asset Manager of the Year at the Consortium of Housing and Asset Management's annual conference in June of 2022.

# TatemConsult@att.net

**Bob Tinglestad** is a Principal with Plante Moran. Bob is one of the firm's business technology leaders with an emphasis on technology optimization and analytics. Bob specializes in improving organizational performance through the use of technology and change management. As both a management consultant and a software services company entrepreneur, Bob has a clear understanding of how software product companies work, what it takes to implement business technology solutions, and what it takes to support and adopt them.

Bob's expertise spans business intelligence needs analysis, data integration, and BI tool implementations. Bob serves a variety of industries, including construction, state and local government, education, oil and gas, manufacturing and distribution, healthcare, and professional services.

Since Bob was young, he has felt that technology impacts nearly every facet of our lives, and this interest led Bob to a career where he could help people effectively leverage it. Clients know he is dedicated to helping them succeed with technology and appreciate that he can help connect the dots from strategy through technical implementation. With over 20 years of experience, colleagues know Bob for his endless curiosity and thought leadership as well as his focused ability to execute and drive change.

Bob received a B.S. in management information systems from Purdue University. Bob participates on the University of Denver's Analytics Advisory Board.

# Bob.Tinglestad@plantemoran.com

**Debra Turner** is Senior Vice President and Chief Loan Administrator at Community Housing Capital. Debra is responsible for managing and directing all aspects of the loan servicing function. Prior to Community Housing Capital, Debra served as a Manager of Internal Audit at SunTrust Banks with a focus on audits of loans and backroom operations. Debra earned a Bachelor of Science, Business Administration from the University of North Carolina at Chapel Hill.

dturner@communityhousingcapital.org

**Katie Vought**, CPA is Senior Manager, Professional Standards with Plante Moran. For more than 19 years, Katie has served organizations with a specialty in working with those in the nonprofit and real estate industries, specifically nonprofits that are involved in real estate development. As a member of the Professional Standards team, Katie reviews not-for-profit and real estate financial statements and support the assurance technical needs of these industry groups. Katie also develops internal technical training for staff and present externally on upcoming accounting pronouncements. Katie has a BBA and MSA in Accounting from Western Michigan University. Currently, Katie lives north of Pittsburgh with her husband and two daughters ages 6 and 9.

#### Katie.Vought@plantemoran.com

**Jared Wolski,** CPA is an Assurance Senior Manager at Dauby O'Connor and Zaleski, LLC ("DOZ") located in Carmel, Indiana. Jared joined DOZ in 2010 after graduating with degrees in Accounting and Finance from the Kelley School of Business at Indiana University. Jared has specialized in the real estate industry his entire career, with a portfolio of clients that includes multifamily housing developers, real estate limited partnerships, construction companies, property management organizations, and not-for-profit corporations, among others. Jared lives with his wife and two young children in rural East-Central Indiana, where they enjoy hiking, camping, and staying active outdoors in their free time.

#### jwolski@dozllc.com

**Sharlene Woodruff** serves as Senior Vice President and Chief Financial Officer of HDC MidAtlantic. She is HDC's longest tenured member of the Executive team, working at HDC for over 30 years! Sharlene is responsible for the planning, implementation, managing finance and accounting activities for HDC and its subsidiaries. Sharlene has a degree from Central Penn College.

#### swoodruff@hdcweb.org