

2025 Financial Management Conference

Telling Your Story

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Sept. 17, 2025

STRENGTHMATTERS[®]



Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. The session host monitoring the sign-in process has paper evaluations if you prefer.
- For more information on CPE credits, contact Lindsay Wells at consult.lwells@gmail.com.

Agenda

- Introductions
- Review **Learning Objectives**
- Overview of session plan and timing
- Q&A
- Wrap up

Learning Objectives

- Discuss the presentation of financial information and REO schedules to your lenders and investors, as well as internal users.
- Identify key elements that tell the story of an organization.

Questions

- We will pause during presentation and again at the end for Q&A but will start the session by asking you a question.

Polling Question 1

- *Is your organization having to spend more time these days discussing your REO schedule or your financial statements with third parties? By show of hands after each possible answer.*
 - A. *Yes, REO*
 - B. *Yes, Financial Performance*
 - C. *Yes, Both REO and Financial Performance*
 - D. *No more than usual*

Polling Question 2

- *Who tells your organizational story? By show of hands after each possible answer.*
 - A. *C-Suite*
 - B. *Departmental Managers (e.g. Director of Asset Management, Property Management, Housing Development, etc.)*
 - C. *Board Members*
 - D. *Other*

Polling Question 3

- *Is everyone who needs to Tell the Story in your organization on the same page?*
 - A. Yes
 - B. No

Polling Question 4

- *Which of the following applies when sharing bad news? By show of hands after each possible answer.*
 - A. *Transparency is key as is accuracy*
 - B. *Timeliness of disclosure is critical*
 - C. *Have a plan for correction or addressing problem (if applicable)*
 - D. *All of the above*

Polling Question 5

- *Are you including the mission story as part of your financial messaging? By show of hands after each possible answer.*

A. Yes

B. No

Evaluation Reminder

- Please submit all conference evaluations.
- Look for the electronic evaluation link in your email.
- Contact consult.lwells@gmail.com if you do not receive the link.

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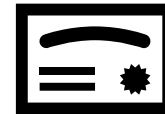
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