

Strength Matters Financial Management Conference 2025 Bios



James “Jim” Aliberti, Senior Vice President of Linc Housing, has more than 20 years of experience in the housing industry, particularly in the area of property management. As SVP, Jim oversees Linc Housing’s asset management team, human resources, and operations. Throughout his career Jim has furthered industry best practices in his leadership roles, and his work has included successes in turning around distressed multi-family properties, re-positioning of assets, employee motivation, and bottom-line operations.

Prior to joining Linc, Jim served as President of the Property Management Division for Interstate Equities Corporation, a private REIT based in the Bay Area. As Senior Vice President of the California and Arizona region for Winn Residential, Jim was responsible for more than 10,700 units of market-rate and affordable housing. Jim’s extensive experience includes 15 years with National Community Renaissance in the role of Senior Vice President of Property Management, overseeing a multi-state portfolio and staff of 275. His expertise spans tax credit financing, market-rate housing, Section 8, distressed properties, new construction, rehabilitation, financial analysis, contract negotiations, and best practices in asset management.

Jim is a graduate of Whittier College with a degree in political science. He serves on the board of directors for the Inland Empire division of the California Apartment Association and has served as past president. Jim holds tax credit and Fair Housing certifications and has been a presenter at industry conferences at both the local and national level.

jaliberti@linchousing.org



Althea Arnold is the Senior Vice President, Policy at Stewards of Affordable Housing for the Future (SAHF) -- a national collaborative of 12 nonprofit affordable housing developers who own, operate and manage 145,000 affordable rental homes in 49 across the country. SAHF's mission-driven alliance advances resident-centered policy changes and sustainable solutions within the affordable housing sector. As part of this, Althea works with key policymakers in Congress, HUD, and other federal and state agencies to build support and remove barriers to the preservation and production of high-quality affordable rental housing.

Althea joined SAHF as Senior Vice President, Policy in 2020. Prior to SAHF, she served as a Senior Legislative & Policy Associate at the National Council of State Housing Agencies, focusing on federal appropriations, HUD multifamily programs, and supportive housing issues. Earlier in her career Althea worked at the National Low Income Housing Coalition researching affordable housing needs to inform housing policy.

Althea holds a Master’s degree in Public Policy from Georgetown University, with a concentration in nonprofit leadership, and a Bachelor of Art’s degree from Connecticut College.

aarnold@sahfnet.org



Michael Barnes is a former Teach For America classroom teacher turned software engineer, and social impact startup founder, who lives in the Rio Grande Valley in Texas. His first company, TeacherTalent, helped schools recruit and hire teachers, and was acquired in 2018.

His current team at [Viva Benefits](#) is helping owners of affordable and workforce housing achieve a 9%+ net income (NOI) boost from improved renter stability, satisfaction, & retention. Viva does this by connecting residents to benefits that address a broad spectrum of Social Determinants of Health (SDOH) including: 24/7 access to doctors, tutors for kids, as well as 4% high-yield savings, credit building through rent reporting, and pre-qualification for grants to buy homes. This holistic approach strengthens economic resiliency and stabilizes households, helping families save \$500 or more, while improving resident retention from 41% to 65%, according to recent case studies.

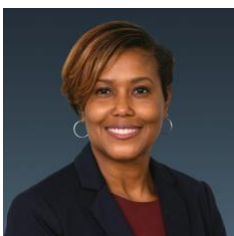
michael@viva.fund



Iris Bashein recently joined National Housing Trust (NHT) as their Chief Financial Officer, responsible for oversight of all accounting operations and financial reporting as well as the overall financial management of the organization. Prior to joining NHT, Iris served as a regional executive in Bank of America's Community Development Bank, where she was responsible for overseeing the underwriting and closing of nearly \$1.5 billion annually in debt and equity financing for affordable housing. Iris joined Bank of America in December 2003. During her nearly 22 years with the company, she held several roles in community development on the equity origination, asset management, construction debt, and permanent debt platforms. Before joining Bank of America, Iris worked as an audit manager at CohnReznick, serving primarily low-income housing tax credit and historic tax credit developer and syndicator clients.

Iris graduated summa cum laude from the University of Maryland with bachelor's degrees in both accounting and English. She is a Certified Public Accountant licensed in the District of Columbia.

ibashein@nhtinc.org



Winell Belfonte, CPA is a partner at CohnReznick. Winell leads the New York office's Affordable Housing practice. In this capacity, she is the lead service provider to her clients and is accountable for the dissemination and implementation of technical issues for affordable housing and not-for-profit clients.

Winell has 30 years of experience providing audit, accounting, and tax services to a broad range of clients, including real estate developers, investors, syndicators, contractors, and property managers, as well as charities and foundations. Her expertise includes strategic planning, design and implementation of internal control structures, financial analysis, budgets, regulatory compliance, and investor requirements

Well-known for her technical expertise, Winell has spoken to many not-for-profit and affordable housing audiences.

Winell.Belfonte@CohnReznick.com



Dan Bertsch, CPA is a principal in the Cleveland office of Novogradac & Company. Bertsch has experience in providing auditing, tax, cost certifications, financial modeling, valuation of partnership interests and compliance services for both for-profit and nonprofit real estate developers in both the low-income housing tax credit and the historic tax credit communities. His primary expertise includes services for developments subject to the regulatory requirements of the U.S. Department of Agriculture Rural Development and the U.S. Department of Housing and Urban Development. Bertsch received a bachelor's degree in accounting from The University of Akron and is licensed in the state of Ohio as a certified public accountant.

Dan.Bertsch@novoco.com



Brent Bozman, Controller joined the NeighborWorks Capital team in 2016. As Controller, he leads accounting, financial and investor reporting, liaises with Lending and Portfolio Management teams, and supports the Chief Financial Officer in investor reporting, audit, banking and administration. Brent brings over 10 years of accounting and reporting experience at a national nonprofit membership organization and employee-owned multinational corporation. Brent has a Bachelor's Degree in Accountancy from Salisbury University and is a CPA in Maryland.

bbozman@neighborworkscapital.org



Jessica Braden serves as Vice President of Asset Management at Community Housing Partners (CHP), where she leads a multidisciplinary team focused on ensuring the long-term viability of CHP's owned and operated properties. Since returning to CHP in October 2022, bringing over a decade of experience in affordable housing and asset management, she has worked closely with departments including Property Management, Resident Services, Compliance, Finance, Real Estate Development, and Energy Solutions to implement strategic initiatives that safeguard CHP's real estate investments. Prior to her current role, she served as a Senior Asset Manager at Virginia Housing, overseeing a portfolio of more than 100 properties. Her earlier tenure at CHP included roles as site manager, district manager, and regional manager, giving her a deep understanding of property operations and resident needs.

A proud Virginia Tech alumna, Jessica holds both a Bachelor of Science in Property Management and Residential Environments and Design, and a Master of Business Administration. She remains actively engaged with her alma mater as a member of the Virginia Tech Property Management Advisory Board and a guest lecturer in the Affordable and Specialized Housing course.

jessica.braden@chpc2.org



Angela Bruno brings twenty-five years of multifamily housing and financial expertise. Since March 2022, Angela has served as the Chief Financial Officer at Mercy Housing. As the CFO, Angela is responsible for Financial Services, Information Technology, and Human Resources.

Prior to Mercy Housing, Angela served as the Chief Financial Officer at National Housing Trust, an affordable housing nonprofit located in Washington D.C. There, she was a strategic partner to the real estate, lending, policy, and energy solutions business lines. She was responsible for NHT's financial oversight, asset management, and human resources. Angela also has experience working at Fannie Mae, where she was a senior director on the Multifamily CFO team. During her tenure, she provided financial advice and oversight to Fannie Mae's Multifamily Business.

In addition to her work in the housing industry, Angela spent over five years in management consulting to government and nonprofit clients at Booz Allen Hamilton and Plante Moran. Her focus was on executive and information technology strategy, organizational design, change management, business process re-engineering, and financial analysis.

Angela holds a Master of Science in Public Policy and Management from Carnegie Mellon University, and a Bachelor of Science in Public Administration from Oakland University.

Angela.Bruno@mercyhousing.org



Michelle Bush is the 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, and nonprofits across the country. C-FACTS provides outsourced Chief Financial Officer and accounting services to several nonprofits. C-FACTS is also a HUD technical assistance provider and expert in federal financial management regulations.

Corporate F.A.C.T.S. is a strategic planning and financial services firm helping clients build strong, vibrant communities. C-FACTS specializes in strategic planning, community development investment planning, and building strong financial management systems.

Prior to starting her own business, Michelle spent nearly twenty years working in high-level local government and non-profit positions. She was the Chief Financial Officer for the Greater Cincinnati Chamber of Commerce, Assistant City Manager and Assistant Budget Director for the city of Cincinnati. Michelle earned an MBA in Finance from Xavier University in Cincinnati, Ohio.

mbush@corporatefacts.net



Sam Buzzelli is a Vice President for the South Region of Community Development Banking ('CDB') at Bank of America. Over recent years, he has held several roles across the Relationship Management and Sales platform for CDB's Southeastern Region that provides clients with advisory services and access to a suite of banking products. In his current role as Relationship Manager, Sam manages a portfolio of client relationships and is responsible for the sourcing, structuring, and originating of real estate and affordable housing financing solutions. Based in Charlotte, Sam covers a client base of real estate development organizations throughout the mid-Atlantic and surrounding Southeastern States, involving for-profit and not-for-profit entities that have a large regional or national development scope. In his prior role, Sam led the region's permanent debt platform, working alongside the team's portfolio of clients to facilitate long-term, taxable or tax-exempt permanent debt that was arranged through agency referrals or made directly to a project through the Bank's proprietary, private placement product.

Sam is originally from Richmond, VA and is an avid Gamecock football fan that enjoys mountain biking, cooking, live music, and spending time with friends and family.

sam.buzzelli@bofa.com



Suny Lay Chang is President and Chief Operating Officer (COO) at Linc Housing. Suny has more than 20 years of professional experience in affordable housing, community development, and strategic management. Her career has been driven by her passion for economic development and poverty alleviation, leading Suny to her work in affordable housing. Suny sees affordable housing as a powerful catalyst to build communities and neighborhoods, as well as a vehicle for economic growth for families and local economies. As President & COO, Suny helps to drive strategic planning, community partnerships, organizational growth, and internal initiatives. Other areas of focus include oversight of Linc's finance, real estate development, fundraising, community and public relations, policy advocacy, property development, risk management, and overall operations.

Prior to joining Linc in 2007, Suny served as Director of Development for New Economics for Women, where she oversaw the financing and construction of new projects, and negotiated joint venture development partnerships. As Management Consultant with The Boston Consulting Group, she consulted for senior managers of Fortune 100 companies across several disciplines, including strategy and operations, valuation and financial analysis, marketing, asset management, and post-merger integrations. Suny's experience in economic development also has taken her abroad, serving at United States embassies in Uruguay and Cambodia. Suny's rigorous business background allows her to apply her technical skills to the nonprofit world and use her analytical strengths to address social and economic issues. Suny obtained her MBA from the Stanford Graduate School of Business and her bachelor's degree in economics from Harvard University.

schang@linchousing.org



Eric Chatman is the Chief Financial Officer at Housing Partnership Network. As CFO, Eric oversees finance, financial planning and analysis, corporate operations, information systems and data analytics. Eric 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 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



Emily Chen is Managing Director of the East Region at the National Equity Fund, the largest not-for-profit tax credit syndicators in the US. In her role, Emily oversees NEF’s originations and production platform for the region. She has been involved in the placement of over \$3.5B in tax credit equity during her tenure. Prior to NEF, Emily managed the programmatic and geographic expansions at two national CDFIs. She is the Board President for the Women in Housing and Finance in NYC. In addition, Emily services on the Advisory Boards for the New York Housing

Conference, Citizens Housing and Planning Council and Supportive Housing Network of New York. Emily received a B.A. in East Asian Studies and Sociology and a Masters in Urban Planning from the University of California at Los Angeles. A first-generation immigrant, Emily now makes her home in NYC with her husband and two boys.

echen@nefinc.org



Chris Cherry, Chief Financial Officer at Wesley Housing, is responsible for all accounting, asset management, payroll, and administration functions. He provides strategic financial analysis and budget oversight for all of the organization's affiliates and subsidiaries.

He has served with 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® and serves on the Board of Directors for The Boys and Girls Club of Anne Arundel County.

Chris is a certified public accountant, a member of the American Institute of Certified Public Accountants, and holds a bachelor’s in accounting from the University of Maryland.

He is a member of several industry associations including Strength Matters® and the Housing Partnership Network.

ccherry@whdc.org



Todd Del Tufo is senior vice president of Asset Management for Enterprise Community Partners' Community Development division. He oversees the company's portfolio of multifamily communities. His primary responsibilities include asset protection and risk mitigation while enhancing the operating performance of the portfolio. Del Tufo is part of the senior management team and the investment committee for Enterprise Community Development.

Previously at Enterprise Homes, Del Tufo was responsible for asset management and sourcing, underwriting and closing new apartment acquisitions. Del Tufo joined Enterprise in 2009. During his 15 prior years in real estate, he performed various origination, underwriting, asset management and auditing roles at Alex Brown Realty, Inc., CapitalSource Finance LLC, and KPMG Peat Marwick, LLP. A certified public accountant, Del Tufo graduated summa cum laude from the University of Maryland with a bachelor's degree in accounting. He received his master's in business administration with a concentration in finance from the Sellinger School of Business at Loyola College. Del Tufo sits on a Howard County Parks and Recreation advisory board whose mission is to promote youth wrestling in Howard County, Maryland.

tdeltufo@enterprisecommunity.org



Tony DiBlasi is President, AHTA & Executive Vice President, OCCH. Tony joined Ohio Capital Corporation for Housing (OCCH) in 2003 and currently serves as EVP, Operations and Asset Management. In this capacity, he is responsible for the strategic direction of OCCH's Asset Management, Operations and Information Technology Departments. Prior to joining OCCH, Tony worked eight years in the affordable housing industry where he assumed many roles for National Church Residences, a nationwide provider of affordable housing and supportive services. Tony is a Housing Credit Certified Professional (HCCP), a Specialist in Housing Credit Management (SHCM), a Certified Housing Asset Manager (CHAM), a Certified Nonprofit Housing Management Specialist (NHMS), and Fair Housing Compliance (FHC) certified. He holds a Bachelor's Degree in Political Science/ International Relations from Ohio University.

TDiBlasi@OCCH.org



Fred Dodson, Jr. is the Chief Operating Officer and Executive Vice President of DreamKey Partners, Inc., where he manages the organization's real estate development and construction activities. Before joining DreamKey in 1997, Fred gained experience directing the Hospitality House of Boone, a North Carolina homeless shelter, the New River Valley Habitat for Humanity Affiliate, and the Montgomery County Community Shelter in Virginia. Fred earned a Bachelor of Science in Psychology from Appalachian State University and a Juris Doctor from the University of Tennessee College of Law.

fdodson@dkp.org



Helen Dunlap is presently a Housing and Community Economic Consultant specializing in strategic, systems and organizational change work for a myriad of international and domestic owners, developers, lenders, and other stakeholders engaged in building, owning and financing affordable housing and economic development efforts. Recent clients include National and Regional Intermediaries, Local Governments/Partners, National & Regional housing developers, Community Development Financial Institutions, and Foundations & International Investors.

Helen ran a local housing nonprofit in Napa California from 1976 –1980. She worked as financial advisor for Caine Gressel Midgley and Slater (now CSG) structuring multifamily and single-family tax-exempt instruments for local and state agencies from 1984- 1989. From 1980-1984, Helen provided training and technical assistance for local governments in how to develop housing programs through a contract with HUD’s Office of Urban Rehabilitation and subsequent contracts with LISC, Enterprise and NeighborWorks. Helen launched the California Housing Partnership, the principal technical assistance facility for affordable housing preservation in California and was the CEO from 1989 -1993. From 1998-2005, Helen ran two for-profit subsidiaries for Shore Bank Corporation. Helen was Deputy Assistant Secretary responsible for FHA multifamily portfolio from 1993-1996 during the first term of the Clinton Administration, and President of the National Low Income Housing Coalition from 1996-1998. She also designed and delivered Housing Development Training Institute course work for LISC in CA, Ohio, New Jersey and the Puget Sound.

Helen specializes in assignments that require a combination of technical knowledge of the field of housing finance and experience with organizational systems and management. These have included: change management for realignment of Mercy Housing in 2006-8, preservation of Greater Miami Neighborhoods portfolio through bankruptcy, successful unwinding of the NHS of Silicon Valley and portfolio reposition, and managing the merger/acquisition of Lakefront Supportive Housing by Mercy Housing, Inc. She has provided support and leadership for a host of housing development and CDFI entities during the development of their strategic plans including BRIDGE, Inc., TNDC, CPDC, Inc., Urban Edge, RCD and Abode Housing. Helen supported the San Diego Housing Authority in the development of their first strategic plan, and provided technical and strategic support for the Oakland Housing Authority during the pandemic. Helen has also been a Senior Advisor and active in the delivery of commercial market assessments in 80 commercial markets for LISC. She currently serves on the Board of the National Equity Fund.

hdunlap@hdunlapconsulting.com



Melissa Geraghty Dunn, CPA, is a partner in Aprio's Affordable and Public Housing and Nonprofit practices in Charlotte, NC, and has more than 20 years of experience. She specializes in auditing nonprofit affordable housing developers, with expertise in complex consolidations, partnership structures, and technical accounting issues. Melissa regularly works with developments funded through LIHTCAcc (9% and 4%), HUD programs, and other federal and state financing. She is recognized as a resource on financial reporting, HUD compliance, and Uniform Guidance.

Melissa is also passionate about giving back to the community and is currently a board member of the North Carolina Women's Affordable Housing Network, Supportive Housing Communities, and is the treasurer of ShareCharlotte.

Melissa.Dunn@aprio.com



Sarah Dunn is a Managing Director within the Real Estate practice at ZRG Partners and lead's the firm's affordable housing search practice. Sarah is based in the Bay Area. Prior to joining ZRG, Sarah was a Managing Director at Terra Search Partners. She has a deep understanding of how organizational culture shapes business strategy which allows her to leverage search in support of each client's individual goals. In all of her assignments, Sarah brings to bear best practices in diversity, equity, and inclusion.

Previously, Sarah served as the first Chief Talent Officer for HR&A Advisors, a leading real estate advisory firm that works with public and private clients across different stages of the planning and development process. At HR&A, she focused on leadership development, recruitment, and organizational strategy. Sarah received her MBA from Fordham University and completed a competitive dual degree program at Oberlin College and Conservatory, where she earned a Bachelor of Arts in Latin Language and Literature and a Bachelor of Music with a concentration in Voice Performance. Sarah is deeply involved in her local community and currently serves on the Board of Directors for the Oakland Parks and Recreation Foundation.

sdunn@ZRGPartners.com



Lauren M. Duplin, CPA is Partner, Outsourced Accounting & Fractional CFO with AAFCPAs. Lauren is a senior leader in AAFCPAs' Outsourced Accounting & Fractional CFO practice, where she provides strategic financial guidance to mission-driven organizations. She specializes in nonprofits within the community and economic development sector, in addition to education, housing, and human services sectors. With over a decade of audit experience and a forward-looking approach, Lauren partners closely with CEOs and leadership teams to strengthen financial operations, improve decision-making, and drive sustainable impact.

<https://www.aafcpa.com/people/lauren-m-duplin/>

LDuplin@aafcpa.com



Gretchen Edinburgh, Chief Compliance Officer and Corporate Secretary, has been with Gulf Coast Housing Partnership since March 2007. She oversees the administration of the organization’s master insurance program, serves as risk manager, and manages the day-to-day property portfolio compliance operations.

Before joining GCHP, Gretchen worked for Freddie Mac as Expanding Markets Manager for the southeast region, responsible for developing new public-private opportunities for Freddie Mac customers in the Gulf Opportunity Zone. Prior to her work with Freddie Mac, Gretchen served as the director of operations and compliance for The Finance Authority of New Orleans where she oversaw the origination of \$350,000,000 in mortgage revenue bond programs that resulted in the purchase of over 5,000 affordable homes in New Orleans. Prior to her 10-year tenure at F.A.N.O., she worked in the banking industry in California and Louisiana.

Gretchen has a degree in business management from Northwood University. She is also a graduate of the Residential Underwriting University and the School of Mortgage Banking – professional coursework operated by the Mortgage Bankers Association – and holds both tax credit compliance and real estate professional designations. She currently serves on the board of the Central City Economic Opportunity Corporation.

edinburgh@gchp.net



Kemba Esmond has served as Executive Vice President and Chief Financial Officer at NeighborWorks America since 2021, bringing a diverse background spanning nonprofit, government, corporate, and financial sectors. She began her accounting career in nonprofit publishing, later leading business operations and strategic planning for a city government agency in Philadelphia, where she helped raise over \$20 million. Kemba then transitioned to the corporate sphere, holding key roles in credit risk and finance at JPMorgan Chase, where she developed financial analytics for the Chase Ink Business Card, and at Fannie Mae, where she focused on loss mitigation analytics and credit risk management for a \$2.3 trillion portfolio in the wake of the 2008 financial crisis.

Kemba holds a B.S. in Accounting from Oakwood University and an MBA from Pittsburg State University. A Certified Public Accountant, she brings a deep commitment to NeighborWorks America's mission of community revitalization.

kesmond@nw.org



Leah F. Evans is the President and CEO of Homeport, a NeighborWorks America affiliate and leading housing developer in Central Ohio. With 25 years of experience in economic and community development, Leah has worked for the Ohio Department of Development and the City of Gahanna. She leads a team managing 2,800 apartments and homes, supporting over 7,000 residents. Under her leadership, Homeport launched nearly \$6 million in homebuyer assistance programs, initiated its first development in Delaware County, and expanded onsite services across Central Ohio. Previously, as Senior Vice President of Real Estate Development, she oversaw over \$70 million in investments, providing housing for 600 new residents. Leah serves on boards including NeighborWorks Capital, the Affordable Housing Alliance of Central Ohio, and the Columbus Women’s Commission. She holds a Master of City and Regional Planning from The Ohio State University, is a graduate of the NeighborWorks Harvard Achieving Excellence Program, and is certified in PMP Project Management and Economic Development Finance. Leah is dedicated to creating inclusive communities where everyone can thrive.

leah.evans@homeportohio.org



Michael Fairley is an Account Manager at MRI Software/TCAM with over 7 years of experience working with affordable housing owners, investors, syndicators and debt providers. MRI Software provides asset management software and services solutions to affordable housing stakeholders and Michael is responsible for managing the company’s LIHTC Asset Management client base.

Michael.Fairley@mrsoftware.com



Frances Ferguson serves as Senior Advisor for the Mueller Foundation. Having advised Catellus twenty years ago on the affordable housing plan for Mueller, she has now managing the transition of the Foundation from a “trustee” to an active “operating steward” of their nearly 700 unit portfolio of shared appreciation homes, and is now advising the newly hired Executive Director on a half-time basis.

Throughout her 40-year career in affordable housing, Frances has led strategic advancements in affordable housing in Austin and nationally. From 1986-1997, Frances served as the founding executive director of Foundation Communities, pioneering the provision of service-enhanced rental housing at scale in the Austin and Dallas-Ft. Worth markets. She then worked for 23 years with NeighborWorks® America, guiding the development of national resources for nonprofit rental housing organizations which provide high quality rental homes for over 200,000 households.

Currently, her board service includes: HousingWorks Austin, uniting community and business leaders around public policies to support “all kinds of homes in all parts of town”; Texas Housing Conservancy, building private equity to preserve existing workforce rental housing; and Texas Housing Finance Corporation, supporting innovative housing solutions in Texas.

Frances holds her master’s degree in real estate and finance from the University of Texas at Austin, and her bachelor’s degree from Oberlin College.

fferguson@muellerfoundation.org



Jill Fioravanti is Principal of ConCura Coaching, Facilitation and Consulting, LLC. Jill builds the capacity of non-profit organizations and their leaders to better meet their mission and maximize community impact. She works closely with staff and senior management teams, Boards and stakeholders to facilitate strategic plans, executive transitions, business plan development, change management, peer learning and participatory decision-making processes. Jill serves as an executive coach around performance-based change, conducts organizational and program assessments, and supports senior executives to set and track outcomes for programs and initiatives. Clients include affordable housing organizations and Community Development Financial Institutions; local foundations; social service, sustainable agriculture and health non-profits; local and national housing advocacy groups; regional leadership collaboratives; national intermediaries; foundations; and collective impact efforts.

To ground her 20+-year consulting practice, Jill brings 10 years of community development expertise via senior-level roles at the Cabrillo Economic Development Corporation (CEDC), a nationally recognized affordable housing community development corporation in Ventura (CA), where she worked from 2002-2012. She also served as a Special Projects Manager at California Community Reinvestment Corporation from 2007-2011. Jill holds a BA in Psychology from Stanford University, where she minored in Urban Studies and wrote an undergraduate thesis in the School of Education. She is a graduate of the Coro Fellows Program in Public Affairs and received a MBA with top honors from the Anderson School of Management at the University of California Los Angeles.

jillbfioravanti@gmail.com



Eileen Fitzgerald is serving as Interim Chief Executive Officer of Stewards of Affordable Housing for the Future (SAHF), a national collaborative of 13 nonprofit housing providers that collectively own and operate more than 160,000 affordable rental homes. A seasoned leader with more than 30 years of experience in housing affordability, community development, philanthropy, and nonprofit management, Fitzgerald previously led SAHF as CEO from 2014 to 2019. During that tenure, she advanced the integration of member experience into federal housing policy, launched the Certified Organization for Resident Services and Engagement (CORES)

initiative, and expanded resources to promote energy efficiency and long-term housing stability.

Fitzgerald's leadership experience spans philanthropy, government, and the nonprofit sector. She directed Wells Fargo's \$1 billion housing affordability philanthropy, founded ThruSight to advise mission-driven organizations on strategy, business development, public policy and partnerships, and previously served as CEO and COO of NeighborWorks® America, overseeing more than \$1.5 billion in housing and community development grants and launching the National Foreclosure Mitigation Counseling program. Earlier in her career, she held leadership roles at the AFL-CIO Housing Investment Trust, the McAuley Institute and USDA's Rural Housing Service, and also served at the Fannie Mae Foundation and in state government. She currently serves on the boards of NHT, LIIF, HOCP, and the National Rural Housing Coalition. Fitzgerald holds a Master in Public Affairs from Princeton University and a Bachelor of Science in Finance and Economics from Fordham University.

efitzgerald@thrusight.net



Peter Fitzgerald joined HPN as Vice President, Financial Planning and Analysis, in April 2022. Peter has over 20 years of progressive experience in corporate finance, treasury, business partnering, and M&A, primarily at large corporations. Before HPN, he served as Vice-President of Finance at National Grid, where he directed the annual budget and monthly and quarterly forecasts for a total portfolio of 12+ operating companies with a total annual financial profile of \$7 billion in net sales and \$4 billion in annual capital expenditures. His experience also includes his role as Vice-President of FP&A at Cognition Financial, where he was responsible for the governance of key reporting processes, such as annual budgeting and monthly/quarterly forecasting, monthly financial reporting and analysis, and KPI and dashboard development. He also had stints at Houghton Mifflin Harcourt and Staples in various finance roles. Peter earned in BA in Economics from Boston College and his MBA in Finance and Strategy from Carnegie Mellon University.

fitzgerald@housingpartnership.net



Tammie Fitzpatrick serves as Chief Operating Officer, responsible for the development and implementation of the organization’s strategic plan and annual workplans, leading the coordination of departmental goal setting and execution, building staff capacity, managing long-term complex projects, and providing leadership to the Property Management, Resident Services, and Human Resources departments. She previously served at HDC’s Director of Real Estate Operations. She has worked in Real Estate Development for more than 15 years, including nearly seven years working for Lancaster-based nonprofit housing developers to find solutions to the affordable housing crisis and create housing equity for all. She received her Bachelor of Architecture degree from Virginia Tech and holds a Master’s degree in Real Estate Development from Georgetown University. She is a registered Architect in Pennsylvania and volunteers on several boards and committees that support housing initiatives including the Lancaster County Coalition for Smart Growth, Coalition for Sustainable Housing, Lancaster Equity, Leadership Lancaster Program Committee, and co-chairs the Women in Housing and Finance of PA Steering Committee.

When not at work, Tammie can be found in the weightlifting gym, on a hike in the woods with her family and two dogs, or eating something delicious in a new city.

tfitzpatrick@hdcweb.org



Tamirrashe (Tami) Gambiza is a senior manager in the CohnReznick Boston office. He is a Certified Public Accountant with over 20 years of public accounting experience providing audit and accounting services to the real estate industry, including both the affordable housing and commercial real estate arenas, developers, and not-for-profit organizations – including Uniform Guidance. He is well versed in the accounting, auditing, and compliance regulatory requirements of the Department of Housing and Urban Development (HUD), MassHousing, and various other state agencies.

Education: B.S., Accounting, Bellevue University. Professional Affiliations: American Institute of Certified Public Accountants and Massachusetts Society of Certified Public Accountants, Accounting and Audit Committee member.

Tami.Gambiza@CohnReznick.com



Adam Goldstein is a Senior Development Officer in the City of Boston Mayor's Office of Housing. He leads two programs - the City's development of Permanent Supportive Housing and the City's Acquisition Opportunity Program, which supports mission-driven developers in the acquisition of occupied NOAH properties throughout Boston.

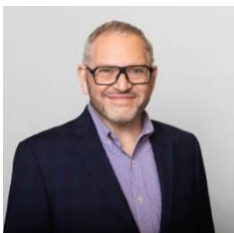
Before starting at the City in April 2022, Adam was as a Vice President at Silicon Valley Banks' Community Development Finance team overseeing LIHTC lending in Greater Boston. He started his career at Affirmative Investments, a small developer and development consultant in Boston working with non-profits on LIHTC and NMTC deals throughout the country.

adam.goldstein@boston.gov



Lorraine D. Gordon has more than 30 years of experience as a people leader, executive coach, facilitator, and entrepreneur. She has a successful track record helping C-suite leaders and their teams build trust, awareness, and cohesion and be more effective in how they interact, communicate, and solve problems - ultimately helping them lead from the inside out. Founder & managing director of Lead with Heart, LLC, Lorraine provides coaching, leadership development, and consulting to organizations primarily in the affordable housing, CDFI, health care, and global consulting industries. She previously held leadership roles at Fannie Mae, Calvert Foundation, CPDC, and Enterprise Community Partners.

[lorraine.gordon@leadwithheartllc.com](mailto:lorrainegordon@leadwithheartllc.com)



Ben Greenberg, Vice President Lending, Housing Partnership Fund. As the VP of Lending, Ben is oversees providing responsive and flexible capital to HPN's member organizations, and develops new products and services to meet membership needs.

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

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

greenberg@housingpartnership.net



Karen Briggs Gwin, CPA, MBA is Chief Financial Officer at Avenue CDC. Karen is a seasoned financial executive with over 35 years of experience spanning finance, accounting, facilities, IT, and HR across professional services and nonprofit sectors. As a licensed CPA and MBA with a finance concentration from Tulane University, she brings strategic oversight and deep technical expertise to every role she holds.

Karen has dedicated the past 13 years to the nonprofit affordable housing sector, currently serving as Chief Financial Officer at Avenue. There, she leads financial planning, reporting, budgeting, cash management, and audit oversight, while also managing construction funding and treasury functions. Her leadership extends to asset management, ensuring compliance with all public and private funding obligations. Under her guidance, Avenue has strengthened financial systems and operational controls, allowing the organization to preserve and sustain over 540 units of high-quality affordable housing across eight development sites and \$90 million in assets.

Previously, Karen served as CFO and Treasurer of New Hope Housing. Her earlier career includes leadership roles in law firm administration and executive search, where she developed her operational and financial acumen across complex, multi-site organizations.

Karen earned her BS in Accounting from the University of Houston–Downtown and holds a Housing Finance Specialist certification from the National Development Council.

kareng@avenuecdc.org



Ethan Handelman has been a long-time leader in affordable housing and housing finance in the public and private sectors. Most recently, he served as the Deputy Assistant Secretary for the Office of Multifamily Housing Programs at the U.S. Department of Housing and Urban Development (HUD), a position he was appointed to by President Biden in February 2021. A signature accomplishment at HUD was the creation and implementation of the Green and Resilient Retrofits Program, which deployed more than \$1 billion to make HUD-assisted housing safer, healthier, and more energy efficient. Prior to joining HUD, Handelman was a Senior Policy Analyst at the Federal Housing Finance Agency (FHFA) in the Office of Housing and Community Investment, which oversees the affordable housing mission activities of Fannie Mae, Freddie Mac, and the Federal Home Loan Banks. Before FHFA, he spent seven years as Vice President for Policy and Advocacy at the National Housing Conference (NHC), finishing his time as Acting CEO. Handelman also previously led the advisory practice at Massachusetts-based Recap Real Estate Advisors, assisting public and private-sector clients to understand and shape the affordable housing financial and policy environment. He holds a Master of Arts in International Relations from Harvard University and a Bachelor of Arts in Political Science from University of Michigan.

ehandelman@cedac.org



Kent Hawkins is a seasoned professional with over two decades of experience in financial analysis and strategic planning. Currently serving as the Senior Director of Financial and Offsite Analysis at NeighborWorks America, Hawkins has been instrumental in driving the organization’s mission forward for the past 22 years. His expertise lies in analyzing complex financial data and providing valuable insights to inform decision-making processes.

In addition to his role at NeighborWorks America, Hawkins serves as Treasurer on the Health Forward Foundation Board of Directors, where he brings his financial acumen to bear in support of the Foundation’s mission to improve the health and well-being of communities in Kansas and Missouri. Kent is also on the Board of The Transition Academy, and organization focused on real world learning and workforce development for high school students with disabilities

Prior to his role at NeighborWorks America, Hawkins served as the Director of Finance for the City of North Kansas City, where he demonstrated his proficiency in budgeting, forecasting, and fiscal management. Prior to that role, Hawkins was Deputy Auditor in Jackson County where he spent years honing his skills in auditing and compliance, laying the groundwork for his future success in financial leadership roles.

khawkins@nw.org



Ivan Hewines is a partner in Plante Moran’s National Tax Office. Ivan specializes in complex partnership tax issues, such as partnership M&A transactions. Ivan also consults with clients on a broad range of real estate and construction tax matters. Because of Ivan’s focused expertise, he helps educate and train staff and team members on partnership issues.

Prior to college, Ivan was a small business owner who realized that accounting was his favorite part of the job. That experience has given him a unique appreciation for his clients’ businesses and a desire to see them be successful.

Ivans belong to the Michigan Association of CPAs and the AICPA, and he graduated with a B.S. in finance from Oakland University.

Fun fact: I graduated high school at 16 years old and shortly thereafter started my first small business. Being an entrepreneur runs in my family!

ivan.hewines@plantemoran.com



Chris Hite is the CEO of Sugar Creek Capital. Chris oversees the Sugar Creek Capital business and enjoys developing long-lasting relationships with our partners and lenders. Chris works daily with developers and federal syndicators to evaluate investment opportunities, as well as working with state authorities to shape state laws and regulations that support affordable housing.

Prior to joining Sugar Creek in 2005, Chris was a founding partner in the law firm of Dull, Hite & Lowe, an associate in the real estate department of Polsinelli Shalton Welte, and a law clerk for the Missouri Housing Development Commission.

In 2008, Affordable Housing Finance magazine named Chris one of the nation’s “15 Young Leaders of the Affordable Housing Industry.”

Chris graduated from the University of Missouri with a bachelor’s degree in political science with an emphasis in business and earned his juris doctorate degree from Washington University in St. Louis. In addition to steering the ship at Sugar Creek Capital, Chris is also qualified to steer real ships.

chite@sugarcreekcapital.com



Duane Hopkins been a senior financial executive for over 35 years in the banking and affordable housing sectors. Duane joined EAH Housing (EAH) in May 2025 as Chief Financial Officer. He leads the organization’s finance, accounting, information technology, corporate operations, governance, and risk management departments.

Prior to joining EAH he was Chief Officer of Program and Finance Administration for the Oakland Housing Authority (OHA). There he led the agency’s finance, procurement, information technology, asset management and risk management departments. He also oversaw the Project Based Contract Administration program serving over 43,000 families in Northern CA. He has also served as the Chief Financial Officer and Deputy Executive Director for Housing Catalyst, the housing authority for the City of Fort Collins, Colorado, from 2010 to 2021. During this time, he helped drive the development of over 650 units of new construction and acquisition/rehabilitation projects for the organization utilizing mixed-finance Low Income Housing Tax Credits (LIHTC) and conventional financing. This included three Rental Assistance Demonstration (RAD) conversions in addition to moving two Section 18 disposition transactions forward. Duane also oversaw the process for the organization to obtain an investment grade credit rating from Standard and Poor’s.

Duane is a recognized national leader in the affordable housing industry through his extensive work within the National Association of Housing and Redevelopment Officials (NAHRO). Duane is a past Board Member of the Housing Authority Insurance Group (HAI Group), serving as Chair of the Finance Committee, Vice-Chair of the Insurance Solutions Committee and a member of the Audit Committee and the Investment Sub-Committees. Duane also served as an officer of the Local Housing Administrators Coalition (LHAC), which is a national advocacy organization for Project Based Contract Administrator organizations (PBCAs).

Duane is a Certified Management Executive in affordable housing and holds a bachelor’s degree in finance from Fort Hays State University. He is a graduate of the Program on Negotiation for Senior Executives at Harvard Law School and the Senior Executive Fellows program at Harvard Kennedy School.

Duane.Hopkins@eahhousing.org



Cindy Holler is President and CEO of Community Housing Capital, a national CDFI. 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



Alexandra Jaskula-Ranga is a senior manager in Bridgespan’s Boston office. Since joining Bridgespan in 2019, she has worked with nonprofits in the fields of health equity, economic opportunity, nonprofit networks, and more. Her advisory work focuses on nonprofit strategic planning, new program development, implementation support, and philanthropic strategy. Alexandra has also worked as a facilitator and coach with nonprofit leadership teams in Detroit via Bridgespan’s two-year consulting and capacity building program for nonprofit executive teams, Leading for Impact®. She co-authored “[Making Sense of Uncertainty: Nonprofit Scenario Planning](#)” to assist nonprofits in the early months of the COVID-19 pandemic.

Prior to joining Bridgespan, Alexandra spent a decade in the nonprofit sector, most recently as vice president of strategic consulting at Opportunity Finance Network, a national network of community development financial institutions (CDFIs). In this role, she managed capacity building initiatives for CDFIs advancing racial equity, community health access, and small business ownership. Alexandra started her career as an AmeriCorps*VISTA at a microlender in Philadelphia and also worked at the headquarters of an international humanitarian agency supporting a professional development program.

Alexandra received her MBA from Villanova School of Business. She has a BS in Economics and a minor in Peace and Justice from Villanova University.

Alexandra.Jaskula-Ranga@bridgespan.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 HUD's 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



Stacy Jurado-Miller is a Home Region Senior Program Officer with the Walton Family Foundation, specializing in regional affordability and housing. Prior to joining the foundation, she was a co-founder of the Vecino Group, a real estate development company leading transformative efforts in affordable housing projects across 13 states. She played a key role in establishing 636 units of permanent supportive housing, offering vital assistance to vulnerable populations.

Originally from Southern California, she now calls Northwest Arkansas home. Stacy holds a Bachelor of Arts from the University of Nevada, Reno.

sjuradomiller@wffmail.com



Patrick Kelley is Vice President of Capital Solutions at the Housing Partnership Network. Patrick focuses on developing innovative capital solutions to scale HPN members' growth as well as for HPN social enterprises and HP Ventures. Previously, Patrick led the creation of the Terwilliger Center for Innovation in Shelter, Habitat for Humanity International's private sector innovation and investment arm. While at the Terwilliger Center, Patrick led the creation of the MicroBuild Fund with investment partners Omidyar Network, MetLife, and the US Development Finance Corporation (DFC) as well as the creation of the Shelter Venture Fund to make investments in early-stage companies driving innovation in residential real estate, affordable housing, and sustainable construction. Terwilliger Center initiatives catalyzed over \$15 Billion of investment in housing access and affordability. Prior to the Terwilliger Center Patrick was Executive Director of Urwego Bank, one of the largest financial institutions in Rwanda for housing and small business lending, and led greenfield community finance institutions in Burundi and Eastern Congo. Patrick is a CPA with audit and banking experience and is a graduate of the Princeton School of Public and International Affairs and the Gies School of Business at the University of Illinois at Urbana-Champaign. He teaches a course on social enterprise and development finance at Emory University in Atlanta.

pkelley@housingpartnership.net



Lorraine Kindred is Vice President, Public Affairs at National Community Renaissance ("National CORE"). Previously having served as the Chief of Staff to the founder and Chairman of the Board, Lorraine Kindred assumed the position of Vice President of Public Affairs at National CORE in 2019. Lorraine oversees local, state, and federal legislative strategies, communications, and community outreach with elected officials. She represents National CORE at various conferences throughout the nation and is a speaker at congressional and local roundtable discussions elevating the organization as a thought leader and advocate in the nonprofit affordable housing industry. A graduate of UCLA with a degree in Political Science-Public Law, she has over 25 years of leadership and real estate experience. Formerly Chair of the Upland of Commerce and President of the Pomona Valley Chapter of Executive Women International, she currently serves on the Board of Directors of Inland Action, the Upland YMCA, and the San Bernardino Chapter of the Building Industry Association.

LKindred@nationalcore.org



Brian Kay is the Chief Finance Officer (CFO) of Community HousingWorks, a multistate nonprofit affordable housing developer and owner headquartered in San Diego. Overseeing all operational finance and accounting, fund management, risk management, and insurance-related activities for the organization, Brian draws upon his background as a Certified Public Accountant with over 20 years of combined public and private accounting and finance experience.

During his current 13-year tenure as CFO of Community HousingWorks (CHW), Brian's skilled leadership has increased CHW's internal capital fund over 860%, facilitating CHW's ability to be an innovative and competitive real estate developer and owner with a multifamily real estate portfolio which has grown from just under 1,500 homes to over 5,000 in California and Texas.

Prior to CHW, Brian's career highlights include leadership positions within several diverse San Diego-based companies, including Five Point Capital, Inc., Anonymizer, Inc., and Provide Commerce (formerly Proflowers), where he managed growth from start-up to over \$100 million in annual sales, and played a key role in the company's successful initial public offering (IPO). Brian holds a Bachelor of Arts in Economics and Business from Westmont College in Santa Barbara, CA.

BKay@chworks.org



Gayle Lacroix is Chief Financial Officer for Volunteers of America Massachusetts. Gayle's career began with Ernst and Young, an international public accounting firm, where she rose to the level of Senior Manager during her 15 years on staff. She then joined Madison Park Development Corporation, an affordable housing developer and owner, as its Chief Financial Officer for over 10 years, before joining Roxbury Tenants of Harvard, the owner/operator of an 1100-unit affordable housing campus located in the medical district of Boston. Gayle left Roxbury Tenants in December of 2021 to join the VOAMASS senior management team.

Gayle also 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 an 11-week remote 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 Strength Matters 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.

glacroix@voamass.org



Jane Loechler is founder of Two Cents Consultants. After 30 years in the field, Jane began designing a set of beautiful, relevant and usable tools ...especially for asset managers. Two Cents is a small but mighty team turning these tools into apps and solutions for affordable housing. We are committed to (and on some days obsessed with) harnessing the power of AI to responsibly serve our vision and your mission. We're configuring fully integrated and collaborative SharePoint workspaces in Microsoft's new environment. We've become agile builders in Power Platform, Fabric, Dataverse, and OpenAI -- all supported by Azure's security and governance policies. It's a treasure trove and you already pay for it. We can help you maximize the built-in benefits. Our products, services and process are rooted in partnership. We roll up our sleeves alongside your team to build skills, systems, and confidence—at your pace, with your priorities.

jane@twocentsconsultants.com



Jacques Logan is the Managing Director of New Business Initiatives for the National Equity Fund, where he manages the development of new lines of business for the firm including Missing Middle (capital raise and acquisition of investments) and strategic investments from NEF balance including property technology and lending platforms. Prior to this role he led the Asset Resolution team for National Equity Fund, Inc. where he managed troubled assets as well as post construction risk mitigation efforts.

Prior to joining NEF in 2011, Mr. Logan served as an asset and transaction manager at Apartment Investment Management Company (AIMCO), where he was involved with LIHTC development, asset management and year 15 dispositions. Jacques received his MBA in Finance and Real Estate from the University of Illinois in Chicago in 2008.

National Equity Fund, Inc. is a leading syndicator of Low Income Housing Tax Credits. The Chicago-based non-profit is an affiliate of the Local Initiatives Support Corporation and has played an integral role in creating affordable housing options, revitalizing communities and strengthening local economies for more than 25 years. It has invested \$10.7 billion in 2,225 LIHTC developments, creating approximately 135,000 affordable homes for low-income families and individuals.

jlogan@nefinc.org



Cindy Louie is the Chief Financial Officer at Chinatown CDC. Cindy leads the fiscal department in managing all financial resources and maintaining fiscal stability of the organization. She joined Chinatown CDC in summer 2017 as Controller, overseeing all aspects of fiscal operation of Chinatown CDC's corporate level, property management and housing development. Prior to joining Chinatown CDC, she has over 15 years of experience in public accounting at various San Francisco accounting firms specializing in nonprofit and real estate affordable housing. She also spent about 2 years in Hong Kong and China providing audit and assurance services to SEC public companies in various industries. Cindy was born and raised in Hong Kong, and reside in San Francisco since her college years. She holds a B.S. in Business Administration with an emphasis in Accounting from San Francisco State University and a Master in Taxation from Golden Gate University. Cindy is a Certified Public Accountant.

Cindy.Louie@chinatowncdc.org



Panagiota Mahendru, CGMA is the Executive Vice President & Chief Financial Administrative Officer (EVP & CFAO) at Low Income Investment Fund (LIIF). Panagiota Mahendru provides strategic leadership for the fiscal infrastructure that supports LIIF's programs, business activities and the organization's growth. She brings over 20 years of global hands-on experience building and leading finance teams in for-profit and nonprofit companies.

Previously, Panagiota held the CFO role at the Center for Employment Opportunities, a national nonprofit with over 6,300 employees operating in 31 cities and 12 states providing comprehensive employment services to thousands of individuals who have recently returned home from incarceration. She also worked at Housing Works, a nonprofit addressing AIDS and homelessness with a diversified revenue model in the areas of housing, health and retail.

She currently serves as Board Member at National Affordable Housing Trust (NAHT), and Board Member and Secretary for the Hellenic American Association for Professionals in Finance.

Panagiota received a Master of Arts in Accounting and Finance from The University of Leeds, UK and a Bachelor of Science in Accounting and Finance American College of Greece. Ms. Mahendru is a Chartered Global Management Accountant (CGMA) by AICPA & CIMA.

pmahendru@liifund.org



Linda Mandolini has served as President & CEO of Eden Housing since 2001. Under Linda's leadership, Eden has developed or acquired over 10,600 affordable rental apartments, serving over 22,000 low-income residents in communities throughout CA.

Linda is a leader in housing policy at the local, state and national level and has served on a number of housing policy boards including the California Housing Consortium, the National Housing Conference, the ULI Terwilliger Center for Affordable Housing, and a founding board member of the Housing Trust of Silicon Valley. Linda is a vocal advocate for local and statewide housing policy and expanded resources for affordable housing. Linda worked tirelessly for the passage of statewide and local housing initiatives that have collectively generated billions in funding for affordable housing production.

Linda has received several awards including the Silicon Valley Housing Trust's Housing Champion Award; being inducted into the California Homebuilder's Hall of Fame and the Alameda County Women's Hall of Fame; named to the San Francisco Business Times' Forever Influential Honor Roll in 2016; and the Bay Area's Most Influential Women in Business in 2011, 2014, and 2015. A native of Massachusetts, Linda held various community development positions in Boston. Linda received her AB degree from Wheaton College and her MBA from Boston University.

LMandolini@edenhousing.org



Carla Mannings is President at Housing Partnership Fund (HPF) and Vice President of Lending & Investment at Housing partnership Network (HPN). In this multifaceted role, Carla oversees all lending activities and investor relationships for HPN and HPF's lending businesses. In addition to the lending activities of HPF, this includes HPN's New Market Tax Credit Program (NMTC) supporting homeownership and investment activities of Housing Partnership Ventures, HPN's social enterprise investment

affiliate. Her role is instrumental in driving the ability of members to increase affordable housing production, preservation, and growth of their balance sheets.

Previously, Carla served as Chief Investment and Impact Officer at Partners for the Common Good, where she led, among other things, business development for lending and strategic initiatives including ways to unlock capital for mission driven community development. Other roles in her career include Commercial Banking lending positions at Amalgamated Bank (First Vice President) and City First Bank (Senior Vice President), Relationship Manager for NeighborWorks America, and Commercial Real Estate Loan Officer for Community Housing Capital. Additionally, Carla spent 20 years with Wells Fargo and Silverton Bank.

Carla has served on national Boards, including Opportunity Finance Network (OFN). She was a founding Board member and officer of the National Disability CDFI Coalition. She serves on the Board and is the Loan Committee Chair with NeighborGood Partners. She also serves on Adrian Dominican Sisters and Appalachian Assistive Technology Loan Fund boards. In the Washington, D.C., area, Carla serves as Board Co-Chair of Platform of Hope and is a founding Board Member of Women of Color in Community Development. She is an active member of Alpha Kappa Alpha Sorority, Incorporated.

Carla holds a B.A. from Howard University and MBA from Brenau University. She enjoys traveling, exploring the arts, and volunteering in her community in her free time.

mannings@housingpartnership.net



Jennifer McAllister is Development Manager at Housing Assistance Council (HAC). Jennifer joined HAC in 2019 with nearly 15 years of experience raising funds and creating lasting partnerships for national nonprofits. Before HAC, she led NeighborWorks America’s Resource Development Division, overseeing its daily operations and managing national partnerships. She also championed efforts to grow the fundraising capacity of the local community development organizations that make up the NeighborWorks network. Prior to that, Jennifer served as Director of Corporate Development at Manna, Inc., where she led all fundraising and communications efforts for the organization, including corporate and foundation partnership development, individual donor engagement and solicitation, and managed a revolving loan fund. Jennifer is a Pennsylvania native and received her undergraduate degree from Temple University.

jennifer@ruralhome.org



Tracy McMillan is CEO + Managing Partner at BroadView Talent Partners. Tracy is a seasoned leader in executive search and talent strategy, with three decades of experience advising clients across the nonprofit and for-profit sectors. As the Founder, CEO, and Managing Partner of BroadView Talent Partners, he has built a reputation for placing Affordable Housing, CDFI, and other long-tenured non-profit executives who go on to do transformative work for their organizations. His expertise is a culmination of leadership roles at top-tier organizations, including VP of Global Talent Acquisition for the NBA and Managing Director at The Diversified Search Group.

Tracy is a trusted advisor, frequently sought out by boards to provide counsel on topics like succession planning, executive compensation, and talent management. His ability to listen intently and provide tailored solutions has made him a dynamic keynote speaker and a respected voice in the industry. A INROADS Alumni, dedicated community leader, Tracy also serves on the board of The Opportunity Foundation. Tracy resides in Connecticut, and is the proud parent of two grown daughters, Ariana and CJ.

tracymac@broadviewtalent.com



Mark Meier, Chief Financial Officer at Develop Detroit (DDI), joined DDI in 2020 after serving for eight years as CFO of Montgomery Housing Partnership, an affordable housing developer based in Maryland with over \$250 million in total assets. 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 20 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 nonprofit, corporate and partnership taxation. Mark is a Certified Public Accountant.

mark@developdetroit.org



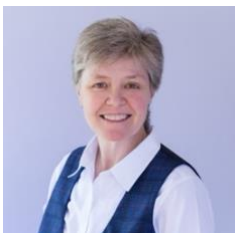
Jeffrey Moline is Vice President-Controller at Eden Housing. Jeff oversees all the activities of Eden’s corporate, development, and property management accounting departments including budgeting, monthly financial statements, annual audit, tax returns, development cost accounting, accounts payable, and 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 Controllershship, 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



M. Dana Moore, Principal – Compass Advisors, LLC, has over 40 years’ experience in commercial real estate finance, credit analysis, portfolio management, property development, work-out management with a specialty in CDFIs. 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.

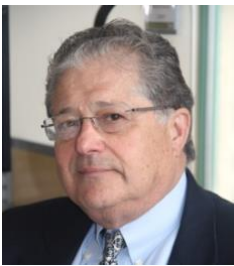
Over the last decade, Dana established Compass Advisors to provide consulting services to the nonprofit community. This has included serving as an interim Chief Financial Officer, mergers and acquisitions leadership, asset management and financial modeling services. Compass clients include MacArthur Foundation, NeighborWorks Capital, NeighborWorks America, Rural Community Assistance Corporation, Forward Community Investments, Northcountry Cooperative Foundation, Cinnaire, Eden Housing, and over 100 other clients focused on affordable housing.

dmoore@compassadvisorsllc.com



Rachel Munsie is the CEO & Co-founder of Ounce of Care, a nationwide resident services platform that empowers healthy and thriving affordable housing communities. The Ounce platform and team support over 20K residents across the country through public benefits enrollment, health and social care coordination, and economic opportunity programming that improve resident outcomes and quality of life. Rachel has authored pieces such as “The Big Beautiful Bill: A Paradox for Affordable Housing” and has been invited to speak on numerous conference panels about Ounce’s work empowering low-income residents and innovating for the social safety net. Prior to starting Ounce, Rachel was on the founding team at Tomorrow Health, a home health company which she dropped out of MIT’s MBA program to build. As their Head of Business Development, she was responsible for go-to-market strategy, built and implemented partnerships with insurers, and scaled teams across sales & operations. Prior to Tomorrow Health, she was an investor for a healthcare private equity firm and an investment banker at Goldman Sachs. She holds a B.S. in Finance & International Business from Georgetown University.

rachel@ounceofcare.com



Harold Nassau after 23 years as NeighborWorks® America’s Senior Director of Asset Management Programs, Harold retired in 2023 to start HCNassau Consulting. Harold oversaw asset management training and technical assistance for one hundred thirty-five local NeighborWorks organizations that develop multifamily housing. He supervised and reviewed the performance of the 170,000 multifamily units owned by NeighborWorks® America’s members to support risk management. In 2005, Harold designed and launched Neighborhood Risk Management Corp. As NeighborWorks® America’s representative, Harold was President of the Consortium of Housing and Asset Management (CHAM®) and headed the Curriculum Development Committee and holds the CHAM® designation as a professional asset manager of affordable housing. HCNassau Consulting assists nonprofits and affordable housing owners in optimizing portfolio performance and developing sustainable real estate operations.

During the five years prior to NeighborWorks® America, Harold was the Asset Manager for MBHP, a Boston based regional nonprofit that developed 2000 units of affordable in partnership with 12 different CDCs. In this capacity he also developed a loan program for 5–20-unit buildings, and an insurance program for small owners of affordable housing. Before entering the world of non-profits and intermediaries, Harold had 17 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. He has also developed rental housing.

Harold is on the Board of Community Housing Partners. He has served on as Board Chair for Boston Aging Concerns and on the Board committees for asset management of, Nuestra Comunidad, and was Board President for the New School of Music in Cambridge. Harold has published numerous articles, including “Value and Values, Affordable Housing Finance, May 2024, “Affordability, Viability and Livability”, Tax Credit Advisor, January 2022, “A Clarion Call for Change in Asset Management” appeared in ULI Magazine, Spring, 2021. “Asset Management and the Survival of Non-Profit Owners” was published in Affordable Housing Finance in May 2015. Harold has B.A from Rutgers University and a PhD (ABD) from Columbia University.

haroldnassau@outlook.com



Daniel A. Nissenbaum is Chief Executive Officer of the Low Income Investment Fund (LIIF). LIIF is a Community Development Financial Institution (CDFI) that has invested \$3.5+ billion in community projects. LIIF also encompasses the National Affordable Housing Trust, a nonprofit syndicator of Low-Income Housing Tax Credits, in which LIIF has a controlling interest. Together with NAHT, LIIF has \$3 billion in assets under management, and maintains an “A” rating with S&P. LIIF was established in 1984 and is a renowned, national CDFI with staff and offices in San Francisco, Los Angeles, New York, Washington, D.C. and Atlanta.

Prior to assuming the leadership of LIIF, Daniel was a Managing Director at Goldman Sachs, where he oversaw Community Reinvestment Act compliance for the firm’s Urban Investment Group and capital investment for the 10,000 Small Businesses program. Previously, he also held real estate and community development finance positions at Chemical Bank, Chase Manhattan Bank Community Development Corporation (CDC), JPMorgan CDC, Merrill Lynch and HSBC Bank. In these roles, Daniel was involved in debt and equity financings, including construction lending, revolving credit facilities and other community development transactions for for-profit and nonprofit intermediaries.

He holds positions on several boards including the Morgan Stanley Community Development Advisory Board, National Association of Affordable Housing Lenders, the National Housing Conference, MPact and Invest Detroit.

Daniel earned a bachelor’s from Grinnell College and a master’s of Business Administration from Columbia Business School.

dnissenbaum@liifund.org



Brett S. Oumedian, CPA is Chief Financial Officer at Cinnaire. As CFO, Brett provides strategic leadership for the organization and financial functions. He is responsible for managing the financial strategy including capital raising, capital allocation, investor reporting, treasury, tax affairs, financial reporting and forecasting. He brings over 15 years of financial management expertise to the position with a focus on developing policies to improve performance and productivity. As CFO, he is committed to maximizing long-term value through a balanced portfolio of complimentary business lines that serve to expand the reach of the organization's mission.

Prior to being named CFO, Brett served as the organization's Controller where he was responsible for the accounting, budgeting and financial reporting functions of the corporate parent and its affiliates. As Controller, he served as the principal interface with the board of directors' audit committee and ensured financial disclosures were timely, transparent and efficient.

Before joining Cinnaire, Brett was a manager with the accounting firm Plante Moran where he helped clients achieve business success through the establishment of sound financial processes. During his tenure, he provided a variety of services which included general accounting, audit and partnership taxation to clients in the real estate and construction industry.

Brett holds an undergraduate degree in finance and a master's degree in accounting from Michigan State University and is a licensed Certified Public Accountant in the State of Michigan.

boumedian@cinnaire.com



Jay Perlmutter is Managing Director of Single-Family Development at The Atlanta Neighborhood Development Partnership. Jay joined 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 developer partnerships and government contracts 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. Since joining ANDP, Jay has helped double annual production to over

100 single-family homes and grow the single-family rental portfolio to more than 265 houses.

Jay has over 20 years of experience in real estate project management with experience in single family development, real estate market analysis and program design and implementation. Prior to ANDP, Jay worked with HavenBrook Homes as Senior Operations Analyst and with the City of Atlanta as NSP Management Analyst. 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



Andrea Ponsor is a seasoned affordable housing and community development executive, currently serving as Chief Operating Officer at the National Housing Trust (NHT) where she cultivates partnership and leads and executes strategies across the real estate, lending, energy solutions and communities of impact teams to further NHT’s mission

Prior to NHT, Andrea served as President & CEO of Stewards of Affordable Housing for the Future (SAHF), where she led interdisciplinary teams that advanced policy and practice solutions for creating affordable homes that are a platform for healthy people and communities. With over twenty years of experience—including roles as Federal Policy Director at LISC and a background a principal of an affordable housing law firm and HUD attorney, she brings deep policy, legal, and financing expertise to the field.

Andrea holds a J.D. from the University of Florida College of Law and a B.A. in Economics from Tulane University.

aponsor@nhtinc.org



Julie Porter is President at DreamKey Partners. Julie’s hope and optimism are potent and contagious. Her straightforward, unwavering belief that housing is the basic building block to economic opportunity has been a driving force for the DreamKey Partners team since 2013. Throughout her entire career, Julie has been a dynamic, decisive pioneer at the forefront of revitalizing communities and improving lives in the Midwest and Southeast. Julie’s talent for “stirring things up” to create masterpieces is also evident in her kitchen, where she loves to bake tempting treats.

jporter@dkp.org



Noel Andrés Poyo is EVP Peer Exchange, Policy & Programs at Housing Partnership Network. As a member of HPN's Executive Team, Noel serves the Network's broad and diverse membership of over 100 affordable housing lenders, builders, owners, and operators. He is a nationally recognized leader and expert in the fields of community development, affordable housing, and impact investing. His 25+ year career has focused on integrating immigrants and low-income households into the mainstream financial services and real estate sectors and on improving the livability and economic resilience of low-income neighborhoods and affordable housing communities.

Noel served for three and half years as a senior Biden Administration appointee at the U.S. Treasury Department. Previously, he served as executive director of the National Association for Latino Community Assets Builders and, prior, as a private sector consultant. From 2015-2017, Noel served as an inaugural member of the Community Advisory Council for the Federal Reserve System. Noel is a graduate of Yale University and a proud husband and girl dad.

poyo@housingpartnership.net



Tracy Pride is EVP, Director of Client Services at IMA. With both insurance company and broker experience, Tracy has 40 years' experience in the insurance industry and has spent the last 25 years at IMA. Specializing in Affordable Housing and other Multi-Family Real Estate accounts, Tracy has worked with the Housing Partnership Network sponsored insurance captive for Property, General Liability and Workers Compensation captive for the last 19 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



Michael Pruell Michael is currently transitioning to become the CFO at Wesley Housing in Alexandria, Virginia. Previously, Michael was a leader in AAFCPAs' Community & Economic Development Practice, specializing in providing audit, tax, and advisory solutions to: community development finance institutions (CDFIs), as well as community development corporations (CDCs) and their affordable housing & commercial development projects.

In the Community & Economic Development sector, Michael has significant experience working with various types of debt financing including tax-exempt bonds, tax credit driven programs, specialized bond programs, and traditional financing. His experience with these financing programs includes his work with borrower clients, as well as a wide variety of lenders, tax credit investors, tax credit allocates, and other financial intermediaries. He is a specialist with the requirements of the U.S. Department of Housing and Urban Development (HUD) funding, Low-Income Housing, New Markets and Federal and State Historic Rehabilitation Tax Credits.

mpruell@whdc.org



Arif Rizvi is EVP/Chief Financial Officer at Community Housing Capital. As Senior Vice President and Chief Financial Officer, Mr. Rizvi is responsible for the development and implementation of financial risk management systems and controls, treasury management, credit quality oversight and general operations and administration management. Prior to Community Housing Capital, Mr. Rizvi served as Chief Financial Officer and Chief Operating Officer for Enclude (formerly ShoreBank International). He has served in Executive Leadership in back-office operations at several large national and international banking institutions, including ABN-AMRO and Bank of America. Rizvi has a professional background in Finance and a Bachelors in Commerce.

arizvi@communityhousingcapital.org



David Robinson, Risk Advisor at Scott Insurance Affordable Housing Practice Group, serves as an advocate, advisor, and broker in Scott's Affordable Housing Practice Group. Affordable housing developers, property managers and equity syndicators benefit from David's expertise in managing their unique risks at the lowest costs so they can focus on improving lives and communities.

[drobinson@scottins.com](mailto:d Robinson@scottins.com)



Connie Rule is Chief of Strategic Partnerships at Mercy Housing. Connie is responsible for developing and executing a highly strategic, innovative, and collaborative plan to identify and engage individuals, foundations, corporations, and other mission-aligned organizations in support of Mercy Housing's mission to create vibrant, healthy communities by developing and operating quality, affordable, service-enriched housing.

Connie joined Mercy Housing in 2018 as the Senior Vice President of National Philanthropy. As Chief of Strategic Partnerships, Connie will continue to lead national philanthropy and strategic support of Mercy Housing's regional philanthropy teams.

Prior to joining Mercy Housing, Connie was the Executive Director for the Boys & Girls Clubs of Colorado. Connie brings past philanthropy and leadership experience from Outward Bound, the Humane Society, and The Spirituals Project at the University of Denver.

crule@mercyhousing.org



Matthew D. Rule, Esq. is Senior Vice President of Housing Development at National Church Residences. Matt leads National Church Residences' acquisitions, development finance, originations, and construction teams. In the past five years his team closed over 30 LIHTC transactions, purchased over 3,000 affordable senior units and closed over \$100,000,000 of new market rate senior housing production. In 2015, Affordable Housing Finance (AHF) named Matt as one of six Affordable Housing Young Leaders. Prior to joining National Church Residences, Matt was a transactional attorney at Squire Sanders, LLP (currently known as Squire Patton Boggs) where he served as legal counsel for a variety of low income housing tax credit developers, syndicators, direct investors and lenders. Matt is a graduate from The Ohio State University Michael E Moritz College of Law where he graduated with distinction as Summa Cum Laude, Order of the Coif. Matt is active at Vineyard Church in Columbus, Ohio and currently serves as the Vice President of the Ohio Housing Council and as a Board Member of the Central Ohio chapter of the Juvenile Diabetes Research Foundation. In the past he has served as a Board Member the National Affordable Housing Trust (2018-2020), a Board Member of the Upper Arlington Rotary Club (2018-2020), a member of the Upper Arlington Citizen Financial Review Task Force (2019) and as the Chair of the Finance Subcommittee of the Upper Arlington Community Center Feasibility Task Force (2020). Matt is married and has four very energetic children.

mrule@nationalchurchresidences.org



Alvin L. Saafir is the Senior Vice President and Chief Portfolio Risk and New Products Officer for Community Housing Capital. Alvin is responsible for supporting and protecting the loan portfolio by managing the Credit Administration Division. He provides appropriate risk oversight based on CHC's risk tolerances and Investor guidelines and provides strategic input at the Senior Management level to ensure balanced growth. Accountabilities include strength in underwriting, timeliness and accuracy of qualitative and quantitative reports, overall performance of the loan portfolio and relationships with the Board, Investors, Loan Officers and other CHC Divisions.

Prior to Community Housing Capital, Alvin served as a Vice President and Senior Relationship Manager in the Community Development Lending Division of KeyBank. Alvin earned his Bachelor of Science in Business Administration with a concentration in Statistics from Bowling green State University in Bowling green, Ohio and his Master of Business Administration from Baldwin-Wallace College in Berea Ohio.

asaafir@communityhousingcapital.org



Tim Sajewski is a treasury management professional with 25+ years of experience. Tim's work has included outside sales, serving as a subject matter expert for receivables products and implementation project management.

Tim serves as a Vice President - Treasury Management Officer for Community Development Banking and Agency Lending clients in the Central and West regions of the U.S. The CDB and Agency group is part of the Commercial Real Estate division of Commercial Banking at J.P. Morgan.

Outside of work, Tim serves the community through blood drives, supporting local food pantries and fundraising for Intellectual Disabilities groups through my membership in the Knights of Columbus.

Tim has been a Certified Treasury Professional since December 2004 and was a Certified Cash Manager from 1995-1998.

timothy.sajewski@jpmorgan.com



Trevor Samios serves as Executive Vice President at WinnCompanies and Chair of the Connected Communities Foundation. As EVP at WinnCompanies, Trevor supports operations strategy, community partnerships and the advancement of mission-driven public policy on behalf of the organization's real estate development and property management divisions.

Trevor began his career at WinnCompanies in 2017, launching Connected Communities as the resident services division of the organization before establishing the Connected Communities Foundation in 2024 to expand the scale and impact of its mission. He now serves as Chair of its Board of Directors, supporting Connected Communities' staff and board leadership to grow its capacity, strategic partnerships, and collective-impact approach to community development nationally.

Prior to joining WinnCompanies in 2017, Trevor led the Community Impact team at Preservation of Affordable Housing (POAH) and operations for the Community Life team at The Community Builders (TCB), both national affordable housing non-profit organizations.

Trevor serves on the board of directors for the YMCA of Greater Boston, HomeStart, National Leased Housing Association and MetroHousing Boston and is active in leadership with multiple affordable housing and community development organizations nationally.

tsamios@wincco.com



Karen Schuler is Executive Vice President – Practice Leader, Nonprofit & Social Impact at CBIZ, Inc. In CBIZ, Inc.’s Talent Solutions practice, Karen leads the firm’s Nonprofit & Social Impact group, a team that helps nonprofit (NP) organizations across the nation leverage leadership and strategy to grow and sustain mission impact. The Nonprofit & Social Impact team is dedicated to helping NPs plan for and thrive through executive leadership transitions, organizational assessments and strategies, and leadership planning consulting with expertise in sustaining organizations led by founder, long tenured, and/or transformational executives. Utilizing a strategic approach, Karen helps clients develop strategies and approaches that result in an improved ability to attract and retain quality talent.

With more than 30 years of experience working in and consulting for NP organizations, Karen is passionate about making a difference in the sector and values the opportunity to advance best business practices in mission-driven organizations. Under Karen’s leadership, the team has worked with more than 800 NP organizations across the US. With footprints from local to global, NP clients include organizations impacting advocacy, associations, behavioral health, community & economic development, education, food banks, health care, housing, and human services.

Karen.Schuler@cbiz.com



Rodney C. Sommers, CPA, is a principal in the Dover, Ohio, office of Novogradac. 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 areas, 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. Sommers is licensed in Ohio as a certified public accountant.

Rodney.Sommers@novoco.com



L. Steven " Steve" Spears has more than 30 years of experience in financial services and affordable housing finance. Steve is currently the Interim Chief Financial Officer at the National Housing Trust (NHT). Most recently, Steve served for ten years as Senior Vice President and Chief Financial Officer for Mercy Housing, Inc., a nonprofit affordable housing developer, owner, and operator based in Denver. Prior to joining Mercy, he served as chief deputy of the California Housing Finance Agency (CalHFA) from 2006 to 2012 and served as CalHFA's Acting Executive Director in 2009 and 2010. Steve also served on the board of directors of the National Council of State Housing Agencies.

Prior to joining CalHFA, Steve was managing director of the SAER Consulting 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 from 1990 to 1996.

Steve currently serves on the board of trustees of The Community Builders in Boston, MA and also on the board of Merritt Community Capital, based in Oakland, CA.

Steve received his law degree from the McGeorge Law School at the University of the Pacific, his Master of Business Administration degree 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.

sspears@nhtinc.org



Heather Starzynski is Senior Director of Asset Management with NeighborWorks America. Heather oversees asset management and resident services training and technical assistance. Most recently, she served as executive director at network organization NeighborWorks Western Vermont, where she implemented the organization's strategic direction, led financial oversight and operations, and line of business management in the areas of CDFI lending, energy efficiency, and residential repair, real estate and property management and home repair for families and seniors. She also served as a director of consulting practice at IFF in Chicago, leading a real estate staff in pre-development consulting strategies. She formerly served as vice president of Field Operations at NeighborWorks America where she developed and executed the strategy for the Field Operations division in areas including grant-making, budgeting, performance management, operations and customer success, as well as a relationship manager, supporting network organizations in real estate development, lending and board governance.

Heather earned her Master's degree in Public Administration from the University of Missouri – Kansas City and her Bachelor's degree in Public Administration from the University of Wisconsin – Green Bay.

HStarzynski@nw.org



Kimberly Stephenson is Director of Asset Resolution at National Equity Fund (NEF), a leading nonprofit affordable housing investment manager and one of the nation’s oldest and largest syndicators of federal Low Income Housing Tax Credits (LIHTCs). With 26 years of experience in affordable housing development across both for-profit and nonprofit sectors, she has led numerous projects from inception to completion. As part of NEF’s Special Servicing team, Kimberly focuses on managing investor risk and minimizing loss through relationship management, financial analysis, and proactive mitigation strategies.

kstephenson@nefinc.org



Julianna Stuart-Lomax is POAH’s Vice President of Community Impact. In this capacity, she collaborates with POAH Communities in a combined effort to make POAH’s housing a platform for resident success.

Julianna’s work is focused on POAH’s national initiatives, including strategic partnerships, fundraising, best practice development and scaling across POAH’s portfolio. Julianna manages POAH’s Family Self-Sufficiency program, the largest of its kind in the nation, which enables HUD-assisted families to build assets, increase their earned income and achieve personal and financial goals. Julianna also leads POAH’s efforts to promote well-being and equity through the lens of trauma-resilient design, property management and resident services.

Julianna has been with the POAH organization since 2017, previously leading the Community Impact department at POAH Communities. Prior to joining POAH Communities, Julianna managed a national project to demonstrate the impact of service-enriched rental housing among 13 members of the Stewards of Affordable Housing for the Future (SAHF) network. Julianna began her career as a resident service coordinator with The Community Builders on Chicago’s West Side.

Julianna graduated Valedictorian with a Bachelor of Arts in Religion and Peace/Conflict Studies from the College of the Holy Cross.

jstuart@poah.org



Erik Svensson is Chief Financial Officer at Linc Housing Corporation. Erik brings over 35 years of experience in real estate finance and investment to Linc Housing. As CFO, his responsibilities include capital management, board reporting, capital procurement, facility negotiation, budgeting, and financial strategy. He has a proven track record in driving strategic financial initiatives, managing high-performing teams, and executing complex investment opportunities.

Having served as an executive in both public and private commercial real estate firms, Erik has worked on hundreds of real estate transactions in several asset classes including multifamily, self-storage, industrial and retail properties. Before joining Linc, he was the Chief Operating Officer of LaTerra Development, a Los Angeles based developer of multifamily and self-storage facilities. His previous experience includes leadership positions at Prologis, Watt Companies, BH Properties, and The Swig Company, twelve years at RREEF/DWS, as well as ten years at Public Storage where he oversaw the commercial real estate portfolio and was a senior member of the acquisitions team.

Erik obtained his MBA from St. Mary's College and his bachelor's degree in finance from Cal Poly, San Luis Obispo. He is also a licensed CPA and holds a California real estate license. He enjoys ocean paddle boarding, skiing and traveling abroad with his wife and two children.

esvensson@linchousing.org



Lance Sutherland, Chief Financial Officer and Executive Vice President, has served in various positions in CHP's complex and expansive accounting and finance divisions across his 12 years with the organization, with 16+ years in the accounting and finance related fields. Prior to joining CHP, Lance worked in the defense and aerospace industry at ITT Corporation, where he gained expertise in financial analysis, strategic planning, cost and project accounting and ERP system design and process improvement. At CHP, he 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 the overall long-term success of the organization. He holds a Bachelor of Science in Business Administration with a major in Accounting and an Master of Business Administration 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



Darren Swanson is Managing Director of Acquisitions for Red Stone Equity Partners, where he is responsible for the origination, acquisition, financial underwriting, partnership structuring, and syndication of tax credit investments for the southeastern region. Darren has 15 years of combined experience in LIHTC syndication, real estate lending, and investing for developers of affordable housing. Experience includes new construction and rehabilitation / adaptive re-use developments utilizing a variety of programs including federal 4% and 9% low income housing tax credits, state housing tax credits, historic tax credits, HOME,

Housing Trust Funds, FHLB AHP, USDA 515, HUD 223(f), 221(d)4, Freddie TEL, RAD, HAP mark to market and project-based housing vouchers. Prior to joining Red Stone, Darren was a Senior Relationship Manager at Bank of America where he provided developers of affordable housing with a variety of real estate secured loans totaling over \$400 million, tax credit equity investments in excess of \$250 million and other bank products and services. Darren began his career as a commercial real estate lender in New York City, closing \$1.5 billion of debt financing during this period. Darren is actively involved in civic and industry organizations, and serves on an advisory board of Charlotte-based non-profit, The Housing Partnership, after eight years as a member of its Board, including serving as Chairman. Darren received a Bachelor of Science in Biology, with a pre-med concentration, from Appalachian State University and holds Series 7 and 63 licenses.

Darren.Swanson@rsequity.com



Valerie Tarnacki is a Senior Treasury Sales Officer covering the Southeast Commercial Real Estate market at Bank of America Merrill Lynch in Charlotte, North Carolina.

Valerie joined Bank of America in 2006 after moving from Jacksonville, FL to Charlotte, NC. In 2012, she transferred to the Global Payments Solutions team to work as a Client Fulfillment Advisor for Real Estate Corporate Banking clients, was promoted to a Treasury Sales Analyst in 2016, and lastly moved into the Treasury Sales Officer role supporting Commercial Real Estate clients in 2018.

She graduated with a Bachelor of Science degree in Real Estate and a Bachelor of Science degree in Finance from The Florida State University. In 2020 she earned her Certified Treasury Professional (CTP) accreditation.

She lives in Charlotte, NC with her husband and two beautiful daughters, Madison (2.5) and Abigail (6 months). She enjoys country music, kayaking, and going to sporting events.

valerie.tarnacki@bofa.com



Tracy Teale, CPA, is a Partner in Aprio LLP’s Non-Profit Assurance practice with over 25 years of experience in public accounting and executive finance. She specializes in nonprofit audits, single audits, and financial reporting, with deep industry knowledge spanning nonprofits, private foundations, education, housing and real estate. Tracy is known for simplifying complex financial matters and helping mission-driven organizations communicate their impact through clear, accurate financials. She previously served as CFO for both a nonprofit and a personnel firm and has led numerous system implementations. Tracy holds degrees from UC Berkeley and UC

Santa Cruz, as well as an MBA and a Master’s in Taxation from Golden Gate University. She is a member of the AICPA and CalCPA and serves on multiple nonprofit boards, including the Girl Scouts of Northern California and Financial Women of San Francisco.

tracy.teale@aprio.com



Nancy Wagner-Hislip is the Chief of Consulting at NeighborWorks Capital, where she provides advisory services to NeighborWorks organizations and other mission driven community development organizations. Her areas of focus include CDFI consulting, organizational assessment, business planning and portfolio analysis. Nancy brings more than 30 years of community development experience to this role and is a recognized expert in community development finance with deep knowledge of major federal financing and subsidy programs, tax-incentivized financing instruments, and complex capital structures. She also has a deep connection to affordable housing,

having served on several national and local boards of organizations dedicated to providing affordable housing.

Nancy joined NeighborWorks Capital in 2023. Prior to that she was the Chief Investment Officer at Reinvestment Fund where she managed a \$700 million loan and investment portfolio and drove annual originations in excess of \$200 million. She was responsible for all aspects of the lending business, including business planning, new business development, loan origination, asset management, lending enterprise risk management, and capitalization.

nwagnerhislip@neighborworkscapital.org



Andrew Walton is a manager based in the Southfield, MI office of Novogradac. With 10 years of experience, he specializes in audits for nonprofit and real estate entities. His nonprofit expertise spans a wide range of organizations, including those adhering to government auditing standards and OMB Uniform Guidance. In the real estate realm, he has worked on projects meeting regulatory requirements from the U.S. Department of Agriculture, Rural Development, the Michigan State Housing

Development Authority, and the U.S. Department of Housing and Urban Development. Andrew attended Eastern Michigan University and is a member of the Michigan Association of Certified Public Accountants. He is licensed as a certified public accountant in the state of Michigan.

Andrew.Walton@novoco.com



Christine Wendell is the co-founder and CEO of Pronto Housing, and a Principal at Dure Investment Group. Pronto is an affordable housing leasing and compliance software and service solution with customers in more than 20 states. DIG provides bridge capital for affordable housing preservation in development. To date, the company has facilitated over 1,000 units of affordable housing through mezzanine debt and preferred equity investments.

She began her career in real estate with Wells Fargo Bank's credit training program. Christine then went on to hold notable positions in multifamily asset management at RXR Realty and Megalith Capital Management. Christine holds a BA in Economics and English from Kenyon College and an MBA from the Kellogg School of Management at Northwestern University. She was named one of Business Insider's 2021 Rising Stars of Real Estate, and on GlobeSt.com's Women of Influence list in 2022.

christine@prontohousing.com



Jared Wolski, CPA is an Audit Principal at DOZ LLC. Jared Wolski, CPA. Jared has been with Dauby O'Connor & Zaleski, LLC and specialized in the real estate industry since 2010. Jared's portfolio of clients includes multifamily housing developers, real estate limited partnerships, construction companies, not-for-profit corporations, and property management organizations, among others.

Jared has been responsible for managing the execution of all phases of the audits, reviews, compilations and agreed-upon procedure engagements of partnerships, limited liability companies and not-for-profit organizations that are owned by real estate developments, including funds. He is experienced in affordable housing developments and specializes in the low-income housing tax credit (LIHTC) and historic rehabilitation tax credits to be claimed under IRC Section 47, including properties financed or subsidized through the U.S. Department of Housing and Urban Development (HUD). These engagements have been prepared for HUD, RD, state housing agencies, and various debt and equity providers. He also has extensive experience across multiple state agencies for 10% carryover tests, final cost certifications, and issuance of IRS form(s) 8609.

Jared has participated in numerous committees at DOZ, including the Quality Control Committee. In this position, he assisted the Director of Quality Control in monitoring the firm's compliance and quality with HUD, the AICPA, state boards of accountancy, state statutes, the U.S. Government Accountability Office, and any other applicable regulators. Jared also assists with the firm's internal inspection program and monitoring technical developments affecting the firm's accounting and auditing practice.

Jared stays current and knowledgeable of the affordable housing industry and the continually changing regulatory environment by attending continuing education classes and conferences, researching trends in the industry, and compiling industry data on an ongoing basis. Jared also shares the knowledge he obtains from research and conferences with other DOZ staff by leading various trainings for the firm each year.

jwolski@dozllc.com