

**Strength Matters® Financial Management Conference
Omni Charlotte Hotel**

September 16, 2025, 5:30PM to 7:00PM: Welcome Reception – Cyprus Room
September 17-19, 2025: Core Conference – Grand Ballroom/Willow, Birch & Dogwood – Lobby Level
All Sessions – Group Live – Total CPEs Available: 15.4

Tuesday, September 16 Pre-conference activities

2:00 – 4:30 DreamKey Partners Property Tour (*advance registration required*)
 Bus Pickup: From the Motor Lobby (ML), walk through the hotel doors onto College St.

5:30 – 7:00 Opening Reception **Cypress**

Wednesday, September 17 6.4 CPEs available

7:30 – 8:30 Breakfast **Grand Ballroom**

8:30 Welcome **Grand Ballroom**
Presentation of 1st Annual Frances Ferguson Award

8:45 – 10:15 Opening Plenary: A Critical Moment for Our Industry

1.6 CPEs

Moderator: Andrea Ponsor, Chief Operating Officer, National Housing Trust
Ethan Handelman, Executive Director, Community Economic Development Assistance Corporation
Chris Hite, CEO, Sugar Creek Capital
Daniel Nissenbaum, CEO, Low Income Investment Fund
Noel Andrés Poyo, EVP Peer Exchange, Policy & Programs, Housing Partnership Network

With uncertainty ruling the day, we are truly at a defining moment for our industry. Join this opening plenary to hear from our industry’s leading voices, who will present their insights on the current policy priorities and explore different advocacy strategies that address these timely issues. Speakers will discuss approaches for engaging with the administration, Congress, and state and local governments.

However the next year or two plays out, the one certainty is that there will be major change. This is a moment for reinvention – to work together to re-energize and renovate our sector, positioning it for the challenges and opportunities ahead. Join us for the reinvention journey.

Learning Objectives: *Identify key policy and economic considerations that impact shared business lines in the current environment, drivers of those considerations, opportunities for advocacy. Understand how leading organizations/executives identify, manage and communicate risk in a dynamic environment.*

Field of Study: Business Management & Organization

Level: Intermediate

10:15 – 10:30 Break

10:30 – 12:00 CONCURRENT SESSIONS – Block 1

1.6 CPEs **Telling Your Story** **Cypress**

Moderator: Carla Mannings, Housing Partnership Fund & HPN
Iris Bashein, National Housing Trust
Winell Belfonte, CohnReznick
Kent Hawkins, NeighborWorks America

Financial
Performance

A primer in how to present and discuss your financials and tell your organization’s story successfully to different audiences. This includes a discussion of internal messaging, talking to lenders and investors, public partners, foundations and other relevant parties. It will highlight the importance of getting folks on the right page and getting in front of and managing any issues that you need to address.

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

Field of Study: Finance

Level: Intermediate

10:30 – 12:00 CONCURRENT SESSIONS – Block 1 ... continued**Property Management – The Fork in the Road****Poplar Room****Moderator: Harold Nassau**, HCNassau Consulting**James Aliberti**, Linc Housing**Todd Del Tufo**, Enterprise Community Development**Trevor Samios**, WinnCompaniesBusiness
Continuity &
Agility

With portfolios continuing to struggle due to continued collection issues and higher than anticipated operating expenses, the need to drive operational excellence in the management of our properties is critical. Come listen to a discussion about how major industry players have grappled with the decision to exit self-management of their portfolios in favor of retaining third party property managers.

Learning Objectives: Learn how has the property management landscape changed in recent years. Compare and contrast third-party property management and self- management. Understand property management perspectives of owners, managers and investors.

Field of Study: Specialized Knowledge

Level: Intermediate

Foundation and Private Funding Sources**Pomodoro****Moderator: Frances Ferguson**, Mueller Foundation**Stacy Jurado-Miller**, Walton Family Foundation**Jennifer McAllister**, Housing Assistance Council (HAC)**Connie Rule**, Mercy Housing

Partnerships

How is philanthropy stepping up in support of the affordable housing industry and our organizations as funding cuts threaten our mission, impact, and in some cases our sustainability as organizations. This panel from an array of foundation segments will discuss how they see and are addressing this moment.

Learning Objectives: Discuss the process of designing a new organizational funding strategy and identifying communications strategy to match funder goals/trends. Describe how to evaluate a funder as potential fit for your organizational fundraising campaigns. Explain how to assess funder needs, including CRA exam needs for banks. Explain the funder perspective of a strong, durable grantee relationship.

Field of Study: Specialized Knowledge

Level: Intermediate

Talent in an Uncertain Landscape**Oak Room****Moderator: Sarah Dunn**, ZRG**Tracy McMillan**, BroadView Talent Partners**Karen Schuler**, CBIZ, Inc. Talent Solutions PracticeFinancial
Talent &
Teams

From messaging and branding as a talent recruitment strategy to remote work, where is the labor market and what are the key trends driving recruitment and retention of talent? Expert industry recruiters will discuss the state of the talent market and current hiring trends.

Learning Objectives: Understand the macro and micro forces impacting talent recruitment & transition. Identify strategies to strengthen CFO/senior finance professional recruitment. Explain the evolution of the CFO role in housing & community development.

Field of Study: Personnel/Human Resources

Level: Intermediate

12:00 – 1:30 Networking Lunch**Grand Ballroom****Materials QR Code**

Get the conference app for access to all session materials, participants, conference schedule and more!

Materials will also be posted to

<https://strengthmatters.net/2025-conference-materials/>

1:30 – 3:00	CONCURRENT SESSIONS – Block 2	
1.6 CPEs	Lender and Investor Response to Current Environment	Cypress
	<p>Moderator: Ben Greenberg, NeighborWorks Capital Sam Buzzelli, Bank of America Emily Chen, National Equity Fund Darren Swanson, Redstone Equity</p>	
Partnerships	<p>The landscape for LIHTC and lending is changing in light of market volatility, rising costs, prospective tax code changes, etc. Where are the lenders and investors tightening up in underwriting new transactions? How are they evaluating counterparties differently? Are deal structures changing? This session will provide insight into the changing credit markets.</p> <p>Learning Objectives: <i>Discuss the current macroeconomic environment from a lender and investor perspective, explain how to tailor a request and approach to capital partners.</i></p> <p><i>Field of Study: Finance</i> <i>Level: Advanced</i></p>	
	Managing Volatility & Scenario Planning	Poplar Room
	<p>Moderator: Tracy Teale, Aprio Alexandra Jaskula-Ranga, Bridgespan Daniel Nissenbaum, Low Income Investment Fund (LIIF) Brett Oumedian, Cinnaire</p>	
Business Continuity & Agility	<p>Whether it is the possibility of tax code changes, elimination of CRA, loss of project-based vouchers or escalating materials costs, this session will discuss strategies for managing volatility in your business. This will include a discussion of scenario planning as a tool to help drive meaningful business decisions. This will explore everything from building a war chest amidst the uncertainty to eliminating lines of business. Come hear how a panel of your peers are addressing these times. Monitoring for change (metrics being followed) and strategies for moving through this volatility. What are the proactive strategies?</p> <p>Learning Objectives: <i>Understand the role of scenario planning in nonprofit strategy. Identify frameworks and tools for scenario planning. Explain steps to integrate scenario planning into ongoing organizational strategy.</i></p> <p><i>Field of Study: Specialized Knowledge</i> <i>Level: Intermediate</i></p>	
	Succession Planning	Pomodoro
	<p>Moderators: Dana Moore, Compass Advisors & Michael Pruell, Wesley HDC - <i>incoming</i> Chris Cherry, Wesley Housing Development Corporation Lorraine Gordon, Lead with Heart Cindy Holler, Community Housing Capital</p>	
Financial Talent & Teams	<p>Do not leave your organization vulnerable to departure of key staff. Succession planning is critical to ensuring a seamless transition and continuity, particularly in these volatile times. We will explore the key elements of effective succession planning and the essential tools and strategies you need for long-term success.</p> <p>Learning Objectives: <i>Review a framework for successful succession planning, and discuss implementation requirements (coaching, goals, accountability) for ensuring plan traction.</i></p> <p><i>Field of Study: Business Management & Organization</i> <i>Level: Intermediate</i></p>	
	ERM 2.0	Oak Room
	<p>Moderator: Heather Starzynski, NeighborWorks America Panagiota Mahendru, Low Income Investment Fund (LIIF) Gayle Lacroix, Volunteers of America Speaker TBD - HPIEx</p>	
Business Continuity & Agility	<p>Now that you understand what Enterprise Risk Management is, come explore the implementation of robust ERM systems. This session will focus on best practices and, through case studies with three organizations, reveal the benefits ERM implementation has brought them.</p> <p>Learning Objectives: <i>Explore practical tips and suggestions for implementation of enterprise risk management (ERM) in your organization. Identify key strategies for immediate action.</i></p> <p><i>Field of Study: Management Services</i> <i>Level: Advanced</i></p>	

3:00 – 3:15	Break	
3:15 – 4:45	CONCURRENT SESSIONS – Block 3	
1.6 CPEs	Workouts - Disposition Strategies	Cypress
	<i>Moderator: Dana Moore, Compass Advisors Karen Briggs Gwin, Avenue CDC Todd Del Tufo, Enterprise Community Development Alvin Saafir, Community Housing Capital</i>	
Partnerships	This session will address asset disposition as a strategy for resolution of a workout. This will dive into, through use of case studies, negotiating a discount with your hard debt lender, negotiating with soft lenders, sale with regulatory agreements in place, and other mechanisms in a disposition framework for exiting a problem property.	
	<i>Learning Objectives: Evaluate sale as an end goal for a workout. Identify strategies for negotiating guaranty relief with lenders and investors.</i>	
	<i>Field of Study: Finance</i>	<i>Level: Advanced</i>
	Practical Uses of AI	Poplar Room
	<i>Moderator: Jeff Moline, Eden Housing Tony DiBlasi, OCCH Jane Loechler, Two Cents Consulting</i>	
Business Continuity & Agility	A discussion and review of three new AI applications by CIOs in peer companies who are utilizing AI in the day-to-day operations of their companies. This will be a hands-on demonstration of three new AI applications and the practical use of these tools in peer companies.	
	<i>Learning Objectives: Explore the applications of AI in asset management and other spaces. Identify a useful take away for implementation in an organization.</i>	
	<i>Field of Study: Information Technology</i>	<i>Level: Advanced</i>
	Resident Services: Delivery Systems and Business Models	Pomodoro
	<i>Moderator: Eileen Fitzgerald, Stewards of Affordable Housing for the Future Michael Barnes, Viva Benefits Rachel Munsie, Ounce of Care Julianna Stuart-Lomax, POAH</i>	
Partnerships	Under the double pressure of increased resident need and constrained resources, organizations are reviewing the services they deliver, their service targets and their delivery systems. Panelists will discuss the balance and tension between virtual and in-person service delivery and how to create a viable business model.	
	<i>Learning Objectives: Explore innovations in resident service delivery. Discuss a new decision-making framework for which services to deliver, how and to whom. Identify strategies to reduce expenses while expanding necessary resident support.</i>	
	<i>Field of Study: Specialized Knowledge</i>	<i>Level: Intermediate</i>
	Managing Consultants - The Consultant's Perspective	Oak Room
	<i>Moderator: Duane Hopkins, EAH Lauren Duplin, AAFCPAs Jill Fioravanti, Consultant Nancy Wagner-Hislip, NeighborWorks Capital</i>	
Financial Talent & Teams	From time to time, there is a need for specialization and expertise that needs to be filled through outsourcing. How do you set up a successful engagement with clearly defined scopes of work, manage to a budget, and get the desired work product that you are looking for? This session will approach consultant engagement from the perspective of consultants supporting the industry and what has made for "successful" engagements.	
	<i>Learning Objectives: Understand how to maximize the contribution of consultants - from the consultant's perspective - including achieving clarity on scope of work and identifying accurate deliverables.</i>	
	<i>Field of Study: Business Management & Organization</i>	<i>Level: Intermediate</i>

Thursday, September 18 6.4 CPEs available

7:30 – 8:30	Breakfast	Grand Ballroom
8:30 – 10:00 1.6 CPEs	Plenary: Leading Amidst Uncertainty <i>Moderator: Priya Jayachandran, President, National Housing Trust</i> <i>Kemba Esmond, Executive VP & CFO, NeighborWorks America</i> <i>Linda Mandolini, President & CEO, Eden Housing</i> <i>Julie Porter, President, DreamKey Partners</i> <p>Senior leaders from across the industry will share their strategies for navigating protracted and unprecedented uncertainty. This session will explore key questions around leadership, resilience, and innovation – including how they are tackling property and organizational challenges, capitalizing on emerging opportunities, and adapting their leadership approaches. Discussions will also highlight the importance of financial preparedness, as well as collaboration and innovation across the nonprofit, private, and public sectors.</p> <p>Learning Objectives: <i>From a CEO and senior leader perspective, discuss skills and tips that allow finance department leaders to manage market and business volatility.</i></p> <p><i>Field of Study: Business Management & Organization</i></p>	Grand Ballroom
		<i>Level: Intermediate</i>

10:00 – 10:15 Break

10:15 – 11:45 1.6 CPEs	CONCURRENT SESSIONS – Block 4 Developing Your Finance Team <i>Moderator: Eric Chatman, Housing Partnership Network</i> <i>Michelle Bush, Corporate FACTS</i> <i>Angela Bruno, Mercy Housing</i> <i>David Ebenezer, Self Help Enterprises</i> <p>This session will provide practical tools for performing a skill set assessment to identify the development needs for your team. It will also delve into the training and development you'll need to put in place and look at training resources and programs that can support implementation.</p> <p>Learning Objectives: <i>Explain the elements of a robust and disciplined approach to developing a finance team.</i></p> <p><i>Field of Study: Specialized Knowledge</i></p>	Cypress
Financial Talent & Teams		
	Challenges of Rapid Growth <i>Moderator: Peter Fitzgerald, Housing Partnership Network</i> <i>Leah Evans, Homeport</i> <i>Cindy Louie, Chinatown CDC</i> <i>Dana Moore, Compass Advisors</i> <p>This session will address management of rapid growth by starting with a framework for identifying the common pitfalls and challenges experienced during a period of rapid growth. High growth organizations will then share strategies for managing growth and avoiding the pitfalls (or correcting).</p> <p>Learning Objectives: <i>Discuss the challenges that organizations may face during periods of rapid growth. Evaluate tools and strategies for managing a high-growth environment in an organization. Review the pros and cons of certain approaches with real life examples from the panel</i></p> <p><i>Field of Study: Business Management & Organization</i></p>	Poplar Room
Financial Performance		
		<i>Level: Intermediate</i>

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10:15 – 11:45 CONCURRENT SESSIONS – Block 4 ... continued**Navigating Volatility in Public Funding****Pomodoro**

Moderator: Helen Dunlap, Dunlap Consulting
Suny Lay Chang, Linc Housing
Adam Goldstein, Boston Mayor's Office of Housing
Duane Hopkins, EAH

Partnerships

The stress of the volatility and approach of the current administration's policies is impacting both the private and public sector. Understanding the impact on our public partners is critical to understanding how to build successful collaborations. There are a number of initiatives from our public partners underway to bridge gaps in federal funding. This session will explore the public partner perspective on the challenges they are facing and the innovations that are surfacing.

Learning Objectives: *Explore strategies for addressing volatile sources of soft funding. Identify the levers that can be pulled and how to approach a partner.*

Field of Study: Economics

Level: Advanced

Single Family Innovations**Oak Room**

Moderator: Patrick Kelley, Housing Partnership Network
Cindy Holler, Community Housing Capital
Jay Perlmutter, Atlanta Neighborhood Development Partnership
Julie Porter, DreamKey Partners

Financial Performance

Nonprofit organizations are stepping into the single-family homeownership market with creative models that expand access, preserve affordability, stabilize neighborhoods, and build equitable wealth. This panel will highlight approaches that nonprofits are advancing to meet today's housing challenges, with specific initiatives that have perspectives on both the supply and demand sides of the market with real world examples.

Learning Objectives: *Recognize challenges and solutions in nonprofit housing acquisition. Draw actionable insights from the experiences of the four nonprofit organizations to inform future housing acquisition efforts in diverse markets. Explore creative funding and partnership models. Evaluate impact on affordability and community development*

Field of Study: Specialized Knowledge

Level: Advanced

12:00 – 1:15 Lunch**Grand Ballroom****1:15 – 2:45 CONCURRENT SESSIONS – Block 5**

1.6 CPEs

Workouts - Lender and Investor Perspective**Cypress**

Moderator: Dana Moore, Compass Advisors
Todd Del Tufo, Enterprise Community Development
Alvin Saafir, Community Housing Capital
Kimberly Stephenson, National Equity Fund

Partnerships

Loan and investment workouts are on the rise, what makes for a successful approach in dealing with a troubled asset from the perspective of your lender(s) and investor(s). What makes for a "successful" workout? What drives your lender and investor partners? What advice can they provide you prior to a problem emerging?

Learning Objectives: *Discuss strategies and approach for successfully engaging your lenders and investors in the resolution of a problem property.*

Field of Study: Specialized Knowledge

Level: Intermediate

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1:15 – 2:45 CONCURRENT SESSIONS – Block 5 ... continued**Treasury Management Modernization****Poplar Room****Moderator: Arif Rizvi**, Community Housing Capital**Jeff Moline**, Eden Housing**Timothy Sajewski**, JPMorgan Chase**Valerie Tarnacki**, Bank of AmericaFinancial
Performance

Is your treasury management system state of the art? Are you getting a direct feed from your bank into your accounting system? Are your accounts secure and adequately protected? Are you maximizing your returns on your deposits? This session will cover the state of the art in treasury management services from the perspective of three treasury management experts.

Learning Objectives: Understand new treasury management products and services to enhance management of cash. Explain how to offset account maintenance and other costs to maximize the returns on your excess cash with a financial institution.

Field of Study: Management Services

Level: Update

Business Combinations**Pomodoro****Moderator: Steve Spears**, National Housing Trust**Chris Cherry**, Wesley Housing Development Corporation**Priya Jayachandran**, National Housing Trust**Erik Svensson**, Linc HousingFinancial
Performance

Business combinations driven by CEO succession issues, financial opportunity, and business need are driving combinations to the highest level of activity in the last 10 years. This session will dive into the nuts and bolts of business combinations from the perspective of organizations that have completed or are substantially through the combination process.

Learning Objectives: Identify facts and circumstances for which a business combination might be an appropriate solution. Understand the appropriate timing and ways to approach your board members with a business combination discussion. Discuss key questions to ask and analyses needed in a business combination decision.

Field of Study: Management Services

Level: Advanced

Systems Implementation 2.0**Oak Room****Moderator: Sarah Dunn**, ZRG**Brent Bozman**, NeighborWorks Capital**Michael Fairley**, MRI**Christine Wendell**, Pronto HousingBusiness
Continuity &
Agility

Last year, the IT track discussion centered around how to choose a consultant, select software, and begin deployment. Implementation 2.0 explores wringing the efficiency out of the systems, eliminating the bugs, and remapping processes. What is working and not working and what steps have been taken to maximize your investment(s) in technology.

Learning Objectives: Explain best practices and tools to get the most from the implementation of a new system.

Field of Study: Information Technology

Level: Intermediate

2:45 – 3:00 Break**Materials QR Code**

Get the conference app for access to all session materials, participants, conference schedule and more!

3:00 – 4:30 CONCURRENT SESSIONS – Block 6

1.6 CPEs

Insurance Alternatives**Cypress**Business
Continuity &
Agility

Moderator: David Robinson, Scott Insurance Affordable Housing Practice Group
Gretchen Edinburgh, Gulf Coast Housing Partnership
Tracy Pride, IMA
Lance Sutherland, Community Housing Partners

This session will explore alternative ways to address insurance coverages and premiums. Discussion topics will include self-insurance, managing cost through deductibles, telling your unique story directly to the insurers. Hear about successful approaches from nonprofit organizations that have implemented these innovations.

Learning Objectives: Explore alternative ways to manage risk and control premiums. Discuss self-insurance, captives, managing cost through deductible structuring, and telling an organization's unique story to insurers. Explain the market updated on property and casualty insurance trends, with a focus on difficult casualty claims and general liability exclusions.

Field of Study: Specialized Knowledge

Level: Advanced

**Federal Policy - Legislation in Motion:
Implications for Affordable Housing Finance & Leadership**

Poplar Room

Partnerships

Moderator: Althea Arnold, Stewards of Affordable Housing for the Future
Ethan Handelman, Community Economic Development Assistance Corporation (CEDAC)
Ivan Hewines, Plante Moran
Jacques Logan, National Equity Fund

A discussion of where we are in terms of Administration priorities and efforts that impact affordable housing from the perspective of CEOs and their lobbyists. This session will cover the impact on the housing industry of the Big Beautiful Bill. Topics will include NMTC, Opportunity Zones and LIHTC.

Learning Objectives: Understand how the One Big Beautiful Bill Act (OBBBA) and recent legislative proposals (including the ROAD to Housing Act) can reshape affordable housing development, preservation, and investment. Apply strategies to translate federal policy changes into financial strategies, start assessing investor interest impact, adapt timelines, and inform board-level decision-making.

Field of Study: Specialized Knowledge

Level: Update

Strategies for Housing Preservation**Pomodoro**Financial
Performance

Moderator: Dan Bertsch, Novogradac
Jessica Braden, Community Housing Partners
Lorraine Kindred, National Community Renaissance (National CORE)
Matt Rule, National Church Residences

This session will discuss efforts to address the challenges facing housing preservation including post Year 15 property with insufficient reserves for recapitalization, restricted affordability covenants that hinder successfully generating capital for renovation through refinancings, and property condition on red alert. Topics to be discussed will include efforts to monetize losses as a means of raising capital (post tax credit investor exit), and other innovative strategies for raising capital to address the physical needs and preserve the affordability of the properties.

Learning Objectives: Discuss strategies and tools used to preserve affordable housing post Year 15, as well as exploring efforts to monetize losses, and the related HOPE Act.

Field of Study: Finance

Level: Advanced

**Materials QR Code**

Get the conference app for access to all session materials, participants, conference schedule and more!

3:00 – 4:30 CONCURRENT SESSIONS – Block 6 ... continued**Pipeline Management****Oak Room****Moderator: Brian Kay**, Community HousingWorks**Fred Dodson**, DreamKey Partners**Tammie Fitzpatrick**, HDC Mid Atlantic**Leah Evans**, Homeport**Mark Meier**, Develop Detroit**Financial
Performance**

This session will explore managing development pipelines and organizational exposure to predevelopment funding in the face of increased risk and unpredictability of traditionally non-volatile sources of subsidy. How are your peers approaching their development pipelines differently? What risks are organizations no longer comfortable with? What are the hedging strategies or approaches to moving forward with development? How are organizations approaching management of development pipelines in 2025-2026?

Learning Objectives: Discuss critical considerations to successful pipeline management, assess potential challenges and identify tools to increase effective management, including strategies to avoid development fee gaps. Evaluate balancing portfolio growth, mission and financial stability. Explore capital sources, as well as reporting and compliance burdens.

Field of Study: Specialized Knowledge

Level: Advanced

6:00**Optional Thursday Evening Activity** (advance registration required)

Minor League Baseball Game

Charlotte Knights v. Durham Bulls

Gates open: 6:00PM

First pitch: 7:04PM

Contact Omy Colon (colon@housingpartnership.net) or visit the registration table with questions.

**Materials QR Code**

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Friday, September 19

2.6 CPEs available

7:30 – 8:30	Breakfast	Grand Ballroom
8:45 – 10:15	CONCURRENT SESSIONS – Block 7	
1.6 CPEs	Accounting Standards Panel <i>Moderator: Melissa Dunn, Aprio LLP</i> <i>Tamirrashe (Tami) Gambiza, CohnReznick</i> <i>Andrew Walton, Novogradac</i> <i>Jared Wolski, DOZ</i>	Poplar Room
Financial Performance	<p>A perennial favorite, this session will address key accounting and industry trends from the perspective of our accounting partners. The panel will share what they are seeing across their customer base as well as trends and pressures the accounting firms are experiencing directly.</p> <p>Learning Objectives: <i>Understand the impact of new accounting standards on affordable housing nonprofits; review key standards from the past three years. Discuss the impact of upcoming audit standards, along with tips for staying compliant and strengthening financial reporting and decision-making.</i></p> <p><i>Field of Study: Accounting</i> <i>Level: Update</i></p>	
Partnerships	Workout Fundamentals <i>Dana Moore, Compass Advisors</i>	Pomodoro
	<p>The session will provide a primer on workouts, providing a structure for engagement with your lender and investor, outlining key tips and strategies for engagement, and discuss how to frame the "ask".</p> <p>Learning Objectives: <i>Develop an approach and strategy for dealing with lenders and investors on assets or corporate covenant problems that require a negotiated resolution. Discuss a rubric for understanding how to approach these problems.</i></p> <p><i>Field of Study: Finance</i> <i>Level: Intermediate</i></p>	

10:15 – 10:30 Break

10:30 – 11:30	Closing Session: The Road Ahead	Grand Ballroom
1.0 CPEs	Moderator: Dana Moore, Compass Advisors <p>Join your colleagues for an honest assessment of the conference and gain insights and action items that you can take home and apply to your work. We'll explore what content to focus on in the year ahead that we can deliver virtually throughout the year or discuss in person at next year's conference.</p> <p>Learning Objectives: <i>Synthesize major themes and issues arising from conference. Develop action items for implementation at your organization.</i></p> <p><i>Field of Study: Business Management & Organization</i> <i>Level: Intermediate</i></p>	

11:30 Adjourn**Conference Evaluation QR Code**Or go to <https://survey.alchemer.com/s3/8453869/SMconf2025>Join the conversation by following [Strength Matters](#) on LinkedIn. #StrengthMatters**Need CPEs? Be sure to sign in and out of all sessions.**Questions? Email consult.lwells@gmail.com.