$4.25 Billion in private corporate equity investments

Senior Homes of Findlay
Findlay, Ohio

Legacy Pointe
Columbus, Ohio

OCCH congratulates NASLEF on their 26th Annual Conference.

46,500 units of affordable housing

Marlowe Court
Cincinnati, Ohio

Echo Hill Apartments
Vanceburg, Kentucky

800 developments and partnerships

For more information contact:
Peg Moertl, President & CEO
Jack Kukura, Chief Investment Officer
Merydith Greene, Chief of Development
614.224.8446

88 East Broad Street
Suite 1900
Columbus, Ohio 43215
www.occh.org
CAHEC is proud to support the 2019 NASLEF Conference.
To bring meaningful transformation to a community you need to be part of the community. Know the people. Understand their needs. Create a shared vision. And deliver capital, development capacity and trusted partnerships. Over 25 years, we’ve delivered more than $7.3 billion in community impact. And our commitment to creating healthy communities has never wavered.

The Return on Investment:

CINNAIRE IS PROUD TO SUPPORT THE 26TH ANNUAL NASLEF CONFERENCE IN CLEVELAND.
We are once again proud to sponsor NASLEF’s 26th Annual Conference!

In a rapidly challenging and changing environment, NASLEF has continued to provide extraordinary leadership and guidance in helping members work most effectively to build strong and healthy communities across the country.

We are pleased to have this opportunity to join our NASLEF colleagues to network, discuss challenges and explore current issues impacting our industry.
Merritt Community Capital Congratulates NASLEF on its 26th Annual Conference.

The combined funds have financed 8,887 affordable units since 1989.

Since 1989 a total of $846MM has been invested.

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HAP LIHTC HUD 2/15

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Thank you to NASLEF for all of the important work that you contribute to our families as we work together to build sustainable communities!

Kevin P. Martin & Associates, P.C.
Boston | Braintree | Danvers | Fall River
info@kpm-us.com | www.kpm-us.com | 781-380-3520
NNEHIF is proud to support NASLEF and its mission to promote safe, affordable housing.
We congratulate NASLEF on its 26th Annual Conference!

We are proud members of NASLEF and are pleased to show our continued support.

The St. Louis and Kansas City Equity Funds have raised a combined $442 million in capital from corporations and financial institutions which aided in the production of 4,842 affordable housing units.

To learn more about our products and services, please visit our websites at www.slefi.com and www.kcequityfund.com.
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Whether you’re considering investing in an existing project or new construction, analyzing projected investor returns, complying with state housing requirements or evaluating exit strategies, our team can help every step of the way.

Assurance | Tax | Advisory | dhg.com
The affordable housing industry is complex. The reporting requirements, tax implications, project structuring and deadlines can be overwhelming. Whether you’re an investor, syndicator, nonprofit, state or local housing agency and more, our affordable housing professionals can help you thrive.

What inspires you, inspires us.
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Thriving communities are built on investment.

Use the red key.

At Key, we have more than 50 experts across the country to help affordable projects succeed. Because solving the affordable housing crisis is more than a business, it’s our mission.

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Committed to Affordable Housing

For more than 30 years, we have shared opportunities, insight and solutions to promote the growth and revitalization of neighborhoods through low-income housing tax credits, multifamily housing bonds and other community development initiatives for the public and private sectors.

Our community development and affordable housing lawyers take pride in helping you create jobs, grow communities and maximize your impact by assisting you in developing affordable housing opportunities throughout Ohio and across the US.

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Legal professionals committed to the availability of affordable housing and the development of communities since 1998.

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Our reputation was built on decades of experience dealing with the complexities related to investor fund audit, tax and consulting services, including complex deal structuring for LIHTC, historic tax credits, NMTC, HUD, state housing finance agencies and much more.

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bryan.keller@rubinbrown.com | 314.290.3300

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bill.gawrych@rubinbrown.com | 314.290.3300

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SPECIAL EVENTS

NETWORKING RECEPTIONS

SEPTEMBER 11, 2019 | 5:00PM – 6:30PM
Lounge, East Foyer
Cleveland Marriott Downtown at Key Center

Come join us in the East Foyer, for a cocktail and hors d’oeuvre reception. A sophisticated venue featuring large windows, high bar tops, and great views offers an ideal setting to unwind and network with your colleagues.

SEPTEMBER 12, 2019 | 6:30PM – 9:30PM
Rock & Roll Hall of Fame
1100 Rock & Roll Boulevard, 751 Erieside Avenue
Cleveland, Ohio 44114

Cleveland Rocks! Come join us for an evening at the Rock and Roll Hall of Fame, the world’s foremost museum devoted to the celebration and preservation of rock and roll music. Stroll through the exhibits which recognize and archive the history of the best-known and most influential artists, producers, engineers, and other notable figures who have had some major influence on the development of rock and roll.
### SCHEDULE

**For NASLEF Active Members Only**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00AM – 9:00AM</td>
<td>Continental Breakfast</td>
<td>West Foyer</td>
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<tr>
<td>8:00AM – 4:00PM</td>
<td>Registration and Information Desk</td>
<td>West Foyer</td>
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<tr>
<td>9:00AM – 12:00PM</td>
<td>Finance Directors' and Fund Managers' Meeting</td>
<td>Salon C</td>
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<td></td>
<td><em>(Limited to two people per organization)</em></td>
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<tr>
<td></td>
<td><strong>Location:</strong> Salon C</td>
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<tr>
<td></td>
<td>This session allows NASLEF Active Member Finance Directors and Fund Managers to informally discuss the state of the industry, emerging trends, and challenges and issues.</td>
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<tr>
<td>10:30AM – 10:45AM</td>
<td>Asset Management Directors' Meeting</td>
<td>Erie Room</td>
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<td></td>
<td><strong>Location:</strong> Erie Room</td>
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<tr>
<td></td>
<td>This session is a Roundtable discussion for NASLEF Active Member Asset Management Directors to discuss trends, challenges and opportunities in asset management.</td>
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<tr>
<td>2:00PM – 4:00PM</td>
<td>Emerging Leaders Roundtable</td>
<td>Salons A &amp; B</td>
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<tr>
<td></td>
<td><em>(Limited to two people per NASLEF Active Member organization)</em></td>
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</tr>
<tr>
<td></td>
<td><strong>Location:</strong> Salons A &amp; B</td>
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<tr>
<td></td>
<td>Roundtable discussion for the emerging leaders in affordable housing. Network with other professionals, share your experiences, and help shape NASLEF for years to come.</td>
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</tbody>
</table>

*Continued on next page*
WEDNESDAY, SEPTEMBER 11 (Continued)

9:00AM – 11:00AM  
**CDFI Roundtable**  
*Location: Salons A & B*

This session is geared towards stakeholders of Emerging, Certifiable, and Certified CDFIs of all sizes. Participants will discuss requirements for CDFI certification, available CDFI Fund Programs, and rising challenges and opportunities within the industry. The session will also provide an open forum for Participants to network and meet peers within the industry.

**Moderator:**
Jon Welty, Ohio Capital Corporation for Housing

12:00PM – 2:00PM  
**Attendee Lunch on Your Own**

2:00PM – 4:00PM  
**Cleveland Property Tour**  
*Location: Catch the shuttle bus at the corner of St. Clair Avenue and West Mall Drive*

5:00PM – 6:30PM  
**Networking Reception**
*Location: Lounge, East Foyer*  
Cleveland Marriott Downtown at Key Center

THURSDAY, SEPTEMBER 12

8:00AM – 9:00AM  
**Continental Breakfast**  
*Location: Salon D*

8:00AM – 4:00PM  
**Registration and Information Desk**  
*Location: West Foyer*

9:00AM – 9:30AM  
**Welcome and Opening Remarks**  
*Location: Salons E, F, G, H*

Bill Shanahan, NASLEF President, President of Northern New England Housing Investment Corporation

Peg Moertl, NASLEF Conference Host, President & CEO of Ohio Capital Corporation for Housing
9:30AM – 11:30AM

Opening Plenary
Location: Salons E, F, G, H

Moderator:
Peg Moertl, President & CEO, Ohio Capital Corporation for Housing

Speakers:
Benson “Buzz” Roberts, President & CEO, National Association of Affordable Housing Lenders
David A. Smith, Founder & CEO, Affordable Housing Institute
Jennifer Seamons, Senior Vice President and National Originations Manager, Key Community Development Corporation

11:30AM – 1:00PM

Lunch and Annual Business Meeting
(Included in registration fee)
Location: Salon D

1:15PM – 2:15PM

Addressing Poverty through Mixed-Income Development
Location: Salons B & C

Mixed-Income Development has successfully transformed public housing complexes, neighborhoods and communities into safer and more attractive developments for residents from a range of income levels. Join us to learn more about the benefits of Mixed-Income developments and explore how they are structured and operated.

Moderator:
Tania Menesse, City of Cleveland

Speakers:
Mark L. Joseph, Case Western Reserve University
Jeff Beam, The Community Builders

Bridge the Gap: Connecting Emerging and Existing Leaders
Location: Salon E

Identifying and developing the next generation of leaders is a crucial component to the successful evolution of all organizations. One of the necessary steps in that process is bridging the gap between the Emerging Leaders and the Existing Leaders. During this session we’ll discuss what has worked for some organizations and the expectations of both Emerging Leaders and Existing Leaders.

Continued on next page
Bridge the Gap: Connecting Emerging and Existing Leaders

**Moderator:**
Amy Green, CAHEC

**Speakers:**
Dana Boole, CAHEC
Bill Shanahan, Northern New England Housing Investment Fund
Sherrin Vail, Northern New England Housing Investment Fund
Luan Nguyen, Cinnaire

Diversity, Equity and Inclusion in the Workplace

*Location: Erie Room*

Organizations are seeking to develop effective strategies for mitigating and minimizing the impact of implicit (unconscious) biases in the workplace. Although studies overwhelmingly support the many advantages of leveraging diversity, equity and inclusion—which include enhanced client/customer service, greater employee engagement, more innovative business practices and enhanced financial performance—many organizations continue to struggle with achieving results. This interactive session will focus on the barriers, benefits and behaviors of inclusive organizations and their leaders and will include a panel discussion comprised of corporate leaders and experts in the field of diversity and inclusion.

**Moderators:**
Deb Toby, Cinnaire
Vincent Randolph Brown, V. Randolph Brown Consulting

**Speakers:**
Diana Starks, Federal Reserve Bank of Cleveland
Kevin Clayton, Cleveland Cavaliers
Margot Copeland, KeyBank
Marty Guastella, Oswald Companies

2:15PM – 2:30PM  Break
2:30PM – 3:30PM  

**Opportunity Zones**  
*Location: Salon E*

With an estimated $6 trillion in unrealized capital gains in the market, the Opportunity Zones tax incentive offers tremendous potential for investment in low income communities, but just how well does this incentive work with Low Income Housing Tax Credits? In this session, participants will be provided with a brief overview of how multifamily developers are utilizing the program, as well as a general update on the OZ investor market. The remainder of the session will focus on the structuring of these transactions, illustrated by case studies.

**Moderator:**
Bill Shanahan, *Northern New England Housing Investment Fund*

**Speakers:**
Greg Harris, *Plante Moran*
Vicki Mincey, *Cinnaire*
Scott Neil, *Kutak Rock, LLP*

**Women of NASLEF**  
*Location: Erie Room*

Women have and continue to shape the affordable housing industry. Join us to hear insightful discussions from the Women of NASLEF panel on their careers, including how they came to the industry, and why they chose to stay. Our panelists will also share the importance of attracting, nurturing and cultivating diverse leaders and elevating women in leadership to meet the growing demand and changing landscape of the affordable housing industry.

**Moderator:**
Pushpita Kotikalapudi, *CohnReznick, LLP*

**Speakers:**
Peg Moertl, *Ohio Capital Corporation for Housing*
Yulonda Bryd, *Cinnaire*
Sonya Prear, *CAHEC*

*Continued on next page*
2:30PM - 3:30PM  
**Tax Credits 201—Following the Credit Flow**  
*Location: Salons B & C*

This advanced session will dive into the math behind credit calculations. The panel will 1) explore methods to evaluate and/or account for excess basis, 2) discuss the IRS’s approach to credit loss and recapture, and 3) review strategies to minimize loss of credits and recapture due to casualty events.

**Moderator:**  
Chadd Weisert, *Ohio Capital Corporation for Housing*

**Speakers:**  
Rob Edwards, *Plante Moran*  
Ellen Wilde, *Dauby, O’Connor & Zaleski, LLC*

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3:30PM - 3:45PM  
**Refreshment Break**

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3:45PM - 4:45PM  
**Advanced Tax Matters**  
*Location: Salon E*

This panel will explore advanced technical, legal and tax issues including the difficulties of managing capital accounts, interest expense limitations, 168H elections, and minimum gain. Whether it’s your first time working with advanced matters or you are a seasoned pro, this session with provide an inside look into the current challenges facing experts today.

**Moderator:**  
Gregg Yeutter, *Kutak Rock, LLP*

**Speakers:**  
Vicki Mincey, *Cinnaire*  
Rob Edwards, *Plante Moran*  
Christopher Pulick, *Kevin P Martin & Associates*

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**Asset Management 2.0: Income Averaging**  
*Location: Erie Room*

Income averaging was introduced in 2018 as a new occupancy set-aside option that allows LIHTC owners to serve households with incomes of up to 80% of area median income (AMI) and have these households qualify as LIHTC units, so long as the average income/rent limit in the project remains at 60% of AMI or less. This set-aside option seems to provide many benefits to owners, but there is not much guidance from the IRS or many states on how to implement income averaging and monitor properties utilizing this tool. This session will explore how to lease up a property that has elected income averaging and the challenges of on-going management.
3:45PM – 4:45PM

**Asset Management 2.0: Income Averaging**

*Speakers:*
Kevin Rayfield, *Dixon Hughes Goodman LLP*
Jennifer Robinson, *Spectrum*
Erica Etterling, *Virginia Housing Development Authority (VHDA)*

**Crisis Management: How We Prepare for the Unexpected**

*Location: Salons B & C*

As many of us know, dealing with crises in our industry is unavoidable. Whether it is a hurricane, a fire at a property, or a government shutdown, we often face scenarios we weren’t expecting. Join us to hear first-hand how some of the NASLEF funds are preparing for these situations, how to communicate with your partners when they do happen, and what resources are available to help you after a disaster has occurred.

*Speakers:*
Amy Mallory, *CAHEC*
Lori Tillis, *Ohio Capital Corporation for Housing*
Michelle Kirda, *Belfor Property Restoration*

6:30PM – 9:30PM

**Thursday Evening Reception**

*Rock & Roll Hall of Fame*
1100 Rock & Roll Boulevard, 751 Erieside Avenue
Cleveland, Ohio 44114

Catch the shuttle buses at the corner of St. Clair Avenue and West Mall Drive

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**FRIDAY, SEPTEMBER 13**

7:30AM – 8:30AM

**Buffet Breakfast**

*Location: Salon D*

8:00AM – 11:00AM

**Registration and Information Desk**

*Location: West Foyer*

8:30AM – 9:30AM

**Y15 Projects: Experiences, Challenges and Investor Expectations**

*Location: Salons B & C*

Panelists will focus on analysis and valuation techniques used to determine the value of projects at the end of their compliance period. The panel will also discuss their experiences and challenges as investors expect maximized valuations of the projects to increase their returns at disposition.
8:30AM – 9:30AM  Y15 Projects: Experiences, Challenges and Investor Expectations

**Moderator:**
Luan Nguyen, Cinnaire

**Speakers:**
Blair Kincer, Novogradac & Company LLP
Jan McCormick, Northern New England Housing Investment Fund
Dean Walsten, KeyBank

**Asset Management Beyond LIHTC**

*Location: Erie Room*

NASLEF organizations have diversified and expanded their product offerings beyond LIHTC, requiring them to broaden their asset management capability and focus. Panelists will discuss how they have adapted and developed their asset management for these various other products, key aspects to asset managing each product, and challenges and opportunities for both asset management and their organizations.

**Speakers:**
Royce Lewis, Ohio Capital Corporation for Housing
Ellen Caracciolo, Massachusetts Housing Investment Corporation
Trey Phillips, Cinnaire

**Equity Market Forum**

*Location: Salon E*

This informal forum will allow investors to share their insights about working with NASLEF members in the current equity market and what the future may hold for tax credit investment. Topics include: market demand, pricing, yields, re-emergence of Fannie Mae and Freddie Mac into the market, underwriting issues and CRA changes.

**Moderator:**
Brian Graney, Ohio Capital Corporation for Housing

**Speakers:**
Catherine Cawthon, Fifth Third Bank
Laura Bailey, Capital One
Ryan Amman, BB&T
Dana Brown, Fannie Mae

9:30AM – 9:45AM  **Refreshment Break**
9:45AM – 10:45AM  Managing Construction Risk

Location: Erie Room

A panel of NASLEF members will lead an interactive discussion on best practices for managing construction risk: minimizing cost overruns, avoiding construction delays and ensuring a high quality final product. The panel will also discuss unique challenges and opportunities in their markets: labor shortages, modular construction, infrastructure, etc.

Moderator:
Kip Lewis, Ohio Capital Corporation for Housing

Speakers:
Todd Tober, Tober Building Company
Beth Baar, Cinnaire
Ron Lloyd, RDL Architects
Art DePompei, Huntington Bank

Role of Technology in Asset Management

Location: Salon E

Asset management platforms have evolved quickly over the past 20 years, largely driven by new capabilities enabled by technology. This panel will explore where we have been, and where we are going.

Moderator:
Eric Schmitt, Housing Vermont

Speakers:
Ann Burge, Midwest Housing Equity Group
Ryan Robinson, Cinnaire
Tony DiBlasi, Ohio Capital Corporation for Housing

Exploring the Intersection of Health and Housing

Location: Salons B & C

As Dr. Megan Sandel has proclaimed at our conference last year: “Housing is a vaccine.” The conversation continues in Cleveland as we highlight innovations that blur the lines between health care and housing. Panel will also explore a housing program piloted and funded by a health care insurer.

Speakers:
Jo Ellen McNamara, UnitedHealthcare
Dr. Srinivas Merugu, UnitedHealthcare
Gregory Zucca, The MetroHealth System

10:45AM  Adjourn
NASLEF MEMBERS

ACTIVE MEMBERS

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