



Speaker Biographies & Contact Information



Melinda Anderson
Executive Director
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Melinda Anderson has served in her present capacity since 2007 and has been an integral part of the team that helped increase and strengthen our local economy through recruitment of and assistance to companies such as Chobani Greek Yogurt, C3 Connect, Jayco RV, St. Luke's Regional Medical Center, and Glanbia Foods USA. She also manages the City's urban renewal agency and its \$25 million budget.

Melinda has been active in economic development since 1994 managing such diverse economic development organizations or programs as South Coast Development Council, Bend Oregon Chamber of Commerce, and Molalla Oregon Chamber of Commerce. In addition she has managed a 320,000 square-foot retail property in North Bend, OR and operated a business consulting practice. Her volunteer work has ranged from writing a business advice book for Romanian women as part of her Peace Corps service to being a CASA volunteer in Coos County, OR.

Melinda earned her MBA from Syracuse University and a Bachelor's of Arts in Psychology from University of Portland. In 2006 she completed the 2-year certificate program, Economic Development Finance Professional, from National Development Council.

Melinda is married to Stephen Garrison, has one daughter, and is the very proud grandmother of 21-month-old Caliope.



Duanne Andrade
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Duanne Andrade is SELF's Chief Financial Officer. As CFO, she is responsible for the financial and operational aspects of the organization. Her vast experience with developing non-profit micro lending organizations will provide direction as SELF moves toward financial self-sustainability.

From international management consulting, to microfinance and strategic planning, to teaching as an adjunct professor at the Anahuac University Latin American Center for Social Responsibility (CLARES), to founding Evolution Green Solutions, a company focusing on environmental impact through energy savings products and services, Duanne has published articles in academic books and other forms of media, and has given conferences internationally. She brings a diverse experience expertise to SELF. In addition to her professional experience, Andrade is fluent in English, Spanish, Portuguese, and Japanese and is involved in initiatives that promote sustainable development internationally.

Andrade achieved a Bachelor's degree from NYU in Political Science and Economics and an MBA from the Harvard Institute of International Development (HIID) in cooperation with the Bolivian Catholic University.



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Steve Apfelbacher
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Steve Apfelbacher has been a Financial Advisor in the Ehlers' Roseville office since 1979 assisting Wisconsin and Minnesota municipalities design and implement financial solutions. He is the past President and Board Member of the National Association of Independent Public Finance Advisors (NAIPFA) focusing on the regulation of Municipal Advisors under Dodd-Frank. He is a member of the Municipal Securities Rulemaking Board Municipal Advisor Test

Committee. Steve's greatest contributions to our clients, Ehlers, and the entire municipal finance industry include his extensive knowledge of the business, his creative problem solving skills, and his leadership which has helped Ehlers become a national leader in public finance.



Robert Ardolino
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Robert Ardolino, has developed and successfully implemented a proprietary process for obtaining Federal, state, local and private financing for Transit Oriented Development (TOD) projects. His experience in commercial and residential development and his knowledge of governmental and private funding mechanisms were critical in overcoming the complexities surrounding this process.

Bob has a civil engineering degree from Point Park College in Pittsburgh, PA. In 1984 he started his own company, Ardolino Industries. Working together with The Urban Redevelopment Authority of Pittsburgh, he established himself as a leader in government financing and public/private partnerships specializing in public and senior housing. Bob was exposed to TOD on a consulting project in 2000 and began his research into the topic. Over the next two years he worked at both the state and Federal levels, co-authoring policy which established new land use guidelines as they relate to TOD.

Bob has helped to create the P3 (Public Private Partnership) guidelines and deemed them the new way to successfully achieve all goals in Transit Oriented Development. His current company, Urban Innovations, is the leading consultant firm with projects reaching all over the nation.



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Julie Bennett
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Julie Metty Bennett is a senior vice president at Public Sector Consultants. Ms. Bennett manages the firm's environment and energy practice area, provides strategic counsel and facilitation services, conducts research and analysis, and manages projects for the firm and its clients on a wide range of subjects, including energy, water quality, land use, community and economic development, and natural resource management. She serves as the executive director for Michigan Saves, a multi-million-dollar nonprofit organization managed by PSC that provides financing solutions for energy efficiency and renewable energy improvements. In this capacity, she designs financing programs and oversees organizational governance issues, accounting, and auditing. She also serves as manager of the Great Lakes Fishery Trust, a multi-million-dollar private foundation managed by PSC. In this capacity, she manages staff, budgets, and project tasks; provides strategic direction; and manages grants made to a variety of nonprofit and governmental entities.

Prior to joining PSC in 2000, Ms. Bennett worked for the Michigan United Conservation Clubs as an environmental policy specialist, representing the organization before local, state, and federal policymakers on energy, air quality, and waste management issues. She also managed a variety of issue-specific public education campaigns and coordinated grassroots activities related to the 1996 voter initiative, Proposal G. She then joined the National Wildlife Federation, successfully and strategically managing energy policy advocacy campaigns to educate and mobilize individuals, organizations, and federal, state, and local policymakers in furtherance of Great Lakes protection issues.

Ms. Bennett holds a BA in Interdisciplinary Studies in Social Science, with a concentration in Environmental Policy and a second major in Political Science, and an MS in Resource Development, with specialization in Environmental Toxicology, both from Michigan State University.



John Brancaglione
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John Brancaglione is Vice President of Urban Consulting at Peckham Guyton Albers & Viets, a 160-member firm of architects and planners based in St. Louis with offices in Kansas City. He is a 1967 Graduate of Michigan State University, receiving a B.A. Degree with double majors in industrial design and urban design. John recently completed a 16-year term as Adjunct Professor of Urban Planning in the Department of Civil Engineering at Washington University in St. Louis. He is member of the Board of Directors and a Past President of the



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Missouri Economic Development Financing Association; a member of the Illinois Tax Increment Financing Association, the American Planning Association, and Lambda Alpha International, an international organization of professionals involved with real estate and land economics.

Mr. Brancaglione's experience represents a broad scope of planning expertise involving comprehensive planning and zoning, community and economic development, industrial development, central business district planning, recreational planning, tax increment financing, market analysis, environmental planning and grant application administration. He has provided urban planning consulting services to more than 400 communities, state and Federal agencies, and private industry throughout his 41-year career. In addition, he has been the consulting planner for several projects that have established landmark case law in favor of municipalities regarding zoning, annexation, eminent domain, and redevelopment issues. He is also a recognized expert on Tax Increment Financing (TIF), having managed TIF planning assignments for nearly 100 cities and counties in 12 states.

The majority of Mr. Brancaglione's career has been in consulting; however, he spent nearly four years as Director of Planning and Development for the City of St. Louis' combined economic development organizations.

Mark Brodziski

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Mark Brodziski is the Director of the Specialty Programs Division, Rural Business and Cooperative Programs, USDA. Mark administers loan and grant programs for the purposes of business and economic development in rural communities. His role also includes leading special projects such as expanding the utilization of Rural Business programs in low income communities. Mark previously served as the Program Director for Business and Community Programs in the WI Rural Development State Office for and has served with USDA since 1983.



Chris Chafizadeh

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Chris Chafizadeh is Managing Director & Head of Origination at Assured Guaranty Municipal. Chris joined Assured Guaranty Municipal in 2012 following a 20 year career in Public Finance at MBIA. At Assured Guaranty Municipal, Chris is responsible for business development and origination in all municipal sectors covered by Assured.

Mr. Chafizadeh is a frequent speaker at industry conferences and is a Member of the Municipal Analyst's Group of New York (MAGNY), the National Federation of Municipal Analysts (NFMA), the National Council of State Housing Agencies (NCSHA), the Healthcare Financial Management Association (HFMA), the American Finance Association, the Municipal Bond Club of NY, NACUBO, the Municipal Forum of New York, the Fixed Income Analysts Society, the Government Finance Officers Association (GFOA) and the Education Finance Council.



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Mr. Chafizadeh earned a Bachelors of Science (BS) degree in Business Administration/Finance from Saint Michael's College in Winooski Park, Vermont and a Master of Business Administration (MBA) in Corporate/Investment Finance from Pace University's Lubin Graduate School of Business in New York.

Carly Chase

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Carly Chase is a Senior Project Manager in the Center for Economic Transformation at New York City Economic Development Corporation. At NYCEDC, she helps to oversee cross-sector entrepreneurship initiatives including the City's Incubator Network and the Take the H.E.L.M. competition. She currently sits on the board of the Hebrew Educational Society, a nonprofit community center in Canarsie, Brooklyn. Prior to joining NYCEDC, Carly was an Associate at Goldman Sachs & Co. She graduated with a B.A. from Skidmore College.



Susan Collet

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Susan Collet is Senior Vice President of Government Relations for the Bond Dealers of America. She oversees advocacy efforts before Congress, the Securities and Exchange Commission, the Financial Industry Regulatory Authority, the Municipal Securities Rulemaking Board and other agencies. Prior to joining the BDA, Susan served as Senior Principal for Government Relations for the National Rural Electric Cooperative Association, where she successfully led efforts to develop and enact tax credit bonds for financing utility infrastructure. In addition, she advanced the interests of municipal utilities for over a decade as an advocate at both the American Public Power Association and the Van Ness Feldman law firm, where she represented the Large Public Power Council. In these roles, Susan ensured that the tax exemption for municipal bonds would be preserved through new private use relief rules that reflected significant changes in the utility industry.

Robert Dailey

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Robert Dailey is the Head of Public Finance for PNC Capital Markets and is based in Philadelphia, PA. Dailey joined PNC in 2012 with more than 28 years of experience in public finance and capital markets. Most recently, he spent 18 years at



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J.P. Morgan, where he played an instrumental role in building a successful public finance business and achieved leading market share positions in the regions he managed.



Jean DeBellis

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Jean DeBellis has worked at the Philadelphia Industrial Development Corporation (PIDC), the City of Philadelphia's economic development agency, for the past 28 years. Since 1958 PIDC has made over 6,000 loans totaling more than \$10 billion in financing through its various loan programs, ranging from tax-exempt financing and CDBG lending to business assistance for defense conversion. Ms. DeBellis has been responsible for the day-to-day operations of managing that portfolio, including not only all servicing processes but also a wide range of reporting to outside entities (EDA, HUD, CDFI Fund, SBA) and to "special requests" for information, including politicians at all levels and the press. Her duties included tracking job creation goals and all funding requirements. In 1986 PIDC designed its software package, Portfol™, to help manage everything PIDC does. Ten years later PIDC was approached by other economic development agencies who wanted the opportunity to use Portfol™ and since that point Ms. DeBellis has trained and worked with more than 250 agencies nationwide to assist them in meeting their portfolio management needs. For the past 13 years Ms. DeBellis has been a member of the Loan Advisory Committee for the Women's Opportunity Resource Center, a microenterprise lender in Philadelphia.



John Doherty

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John is a Vice President with U.S. Bank. He is a corporate trust account manager in U.S. Bank's New York City office. Previously employed with JPMorgan Chase and The Bank of New York in the Municipal Finance Corporate Trust department, he has over 15 years' experience in the corporate trust industry. He served on The Bank of New York's municipal corporate trust committee for the Northeast region. He has also served as the bank's New England and New York sales representative in the municipal finance department of the corporate trust division.

Prior to John's involvement in banking, he was the Deputy Executive Director of the New York City Industrial Development Agency (NYCIDA) and Vice President of the New York City Economic Development Corporation. Over a thirteen year tenure, he developed an expertise in industrial revenue bonds and other economic development initiatives. John was instrumental in beginning a straight lease program, as well as an equipment leasing program. He oversaw a portfolio of over 500 industrial revenue and civic facility bond issues.



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As U.S. Bank's representative on the Council of Development Finance Agency's (CDFA) board of directors, John has been a longstanding member and director. He sits on the Board's Executive Committee and chairs CDFA's nominating committee. He teaches corporate trust at the CDFA bond financing courses. He has a Bachelor of Arts degree from St. Bernard's College and a Master of Arts degree from Fairleigh Dickinson University.



Demetric Duckett
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Demetric Duckett is the chief business development officer for TruFund Financial Services where he provides direction and leadership in the development and implementation of the organization's national business growth strategy. Mr. Duckett is responsible for planning, directing and overseeing the elaboration, implementation and management of strategic partnerships and for identifying and pursuing new lending program and product opportunities across the organization's franchise. He also directs the organizations marketing and

communications functions.

Mr. Duckett has over 20 years of experience in banking and finance. Prior to joining TruFund, he was Vice President for Capital Access Programs at Carver Federal Savings Bank where he developed industry-leading M/W/BE loan programs. His earlier positions include Vice President and Community Finance Officer, as well as Vice President for Sales and Marketing, at Carver; Vice President of Community Development at Bank of America; and Vice President and Global Relationship Manager at BankBoston, where he managed a \$2 billion portfolio spanning 16 countries.

A native of South Carolina, Mr. Duckett holds a B.A. in French from Furman University and a Master of International Business from the University of South Carolina. He is fluent in French, Portuguese, and Spanish, and his principal volunteer activities include serving as a board member for African Services Committee and for South Bronx Overall Economic Development Corporation.



Steve Eikenberry
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Mr. Eikenberry is head of tax exempt finance and interest rate derivatives for First American Bank, a \$2.8 billion privately held bank with nearly 50 locations in the Chicago area. He is also a member of their Senior Loan Committee. Prior to joining First American in January 2005, he worked for JPMorgan Chase and predecessor organizations since 1984. Steve has over 25 years' experience originating and underwriting tax exempt bonds for not-for-profit corporations and middle-market manufacturing companies in the Midwest,

and he has completed more than 250 transactions totaling over \$1 billion. In addition, he has executed derivative hedging



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transactions including interest rate swaps, caps and collars for over 100 customers with a total notional value exceeding \$800 million.

Steve's clients include a wide variety of not-for-profit organizations including independent schools, private colleges and universities, graduate schools, social service agencies and cultural institutions. He recently played an active role in working with the Federal Home Loan Banks to win passage of legislation enabling the use of their letters of credit to support tax exempt bond financing.

Mr. Eikenberry holds a Bachelor of Arts in Economics from The Colorado College. Steve is an active member of the Council of Development Finance Agencies and is a member of their Legislative Committee. He speaks regularly at conferences on topics related to tax exempt bond finance and derivatives, and his comments have also been reported in publications including Business Week, The Bond Buyer and The Illinois Manufacturer.

Dennis Enright

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Dennis J. Enright is a founding member and Principal of NW Financial specializing in complex infrastructure, governmental and real estate transactions, including public private partnerships. Mr. Enright is a nationally recognized expert in toll road asset monetization and has appeared before the US Congress to deliver expert testimony on public private partnerships. Mr. Enright has undertaken assignments in transportation, solid waste, water, wastewater, healthcare, housing, and real estate. His leadership in the innovative restructuring of a public facility to a public private partnership led to a "Deal of the Year" Award for the \$360 million Union County Utility Authority bond financing in 1998. His transportation expertise resulted in a "Deal of the Year" award for the \$2.4 Billion New Jersey Turnpike Authority transaction merging the New Jersey Turnpike and the Garden State Parkway. Mr. Enright has authored detailed analyses of both the Chicago Skyway and Indiana Toll Road P3 transactions that have provide transparency to the underlying economics of the deals.

Prior to forming NW Financial, Mr. Enright served as Senior Managing Director of NatWest Bank and was responsible for governmental advisory services and underwritings. During his tenure at NatWest, he was responsible for providing services in: municipal finance; institutional advisory products; private placements; bond underwritings; tax credit investments; letters of credit; and bridge loans. Prior to joining NatWest Bank, Mr. Enright operated Enright & Company, a private investment banking firm, which handled over \$5 billion of financing assignments in its 9 years of operations. Enright & Company was awarded an Institutional Investor "Deal of the Year" for its work at the New Jersey Highway Authority.

Mr. Enright has over 30 years of experience in all aspects of financial advisory and investment banking, Mr. Enright started his career in the public sector for eight years and held the position of Jersey City's Director of Planning and Development, where he was responsible for the master planning of the Hudson River waterfront revitalization.



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Brian Farnen

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As General Counsel, Brian directs legal, legislative and regulatory affairs at CEFIA. Brian was an attorney with the AmLaw 100 law firm Edwards Angell Palmer & Dodge before accepting a position with Sikorsky Aircraft as a Senior Attorney. As a Senior Attorney, Brian oversaw all global Environmental, Health and Safety legal matters (including clean energy initiatives) and supported international commercial matters. Brian's past state government experience includes time spent as a regional director for the Department of Economic and Community

Development and a judicial clerkship for the Honorable Barry Schaller of the Appellate Court.

Brian obtained his Bachelor of Arts Degree from the University of Connecticut. He went on to earn both his Juris Doctorate and Masters of Business Administration from the University of Connecticut School of Law and School of Business, respectively. Brian was also an Adjunct Professor teaching "Law and Society," a member of the Connecticut Judicial Review Counsel and is active in numerous veterans charities.



Price Finley

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Price Finley serves as President of Argus Growth Consultants, Ltd. and is a partner with Argus' affiliate, the law firm of Bricker & Eckler LLP. His work experience includes bond financing and economic development finance. Price has helped communities, developers, and investment bankers structure tax increment financings, community authorities and special assessment programs. He has also assisted with the formation and structuring of joint economic development districts, cooperative economic development agreements,

community improvement corporations, port authorities, regional planning commissions, and enterprise zone and community reinvestment area abatement programs.

Price's relevant experience includes the following:

- Counsel with respect to the creation of more than fifty tax increment financing projects during the past five years.
- Underwriter's counsel for Ohio's first tax increment revenue bond financing secured by special assessment.
- Bond counsel for Ohio's first certificate of participation financing involving a state agency lease of a privately-owned building.
- Bond counsel for Ohio's first new community authority public offering to be structured without a developer letter of credit (used to finance infrastructure improvements such as roads, water, sewer, etc.).
- Underwriter's and special tax counsel for West Virginia's first sales tax TIF bond issue.



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- Bond counsel for first certificate of participation financing by an Ohio school district under statutory procedural guidelines.
- Bond and special counsel for numerous economic development matters, including tax increment financing, enterprise zones, community reinvestment areas, community authority financing and special assessment district financing.
- Counsel to economic development entities such as community improvement corporations, community authorities, regional planning commissions, and port authorities.
- Special counsel to a large urban municipality in pursuing and documenting a Joint Economic Development District involving multiple municipalities, townships, a county, and a port authority.
- Special counsel to a nonprofit corporation exploring a development that required coordination among two counties, two municipalities, and two townships using tools such as a Joint Economic Development District, a community authority, and tax increment financing.
- Special counsel to an Ohio county in pursuing use of Cooperative Economic Development Agreement for a mixed-use development involving multiple jurisdictions.



Steve Friedman AICP, CRE

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Stephen B. Friedman, AICP, CRE, is president of S. B. Friedman & Company, a development advisory firm specializing in public-private development partnerships. He and his firm have had extensive involvement in projects for the Cities of Milwaukee and Chicago as well as numerous suburbs and smaller cities using tax incremental financing, New Markets Tax Credits, and other urban revitalization tools. Projects include commercial, residential, industrial, brownfield, transit-oriented developments, and downtown revitalization projects.

Services provided include development strategies, developer solicitation, deal reviews, deal structuring, and negotiation. The firm has worked on many downtown and/or transit-oriented development programs in such suburbs as Des Plaines, Bartlett, Park Ridge, Glenview, and Palatine as well as providing similar services for the cities of Chicago and Milwaukee.

The firm's services also include market and financial analyses and fiscal impact studies for residential, retail, office, industrial, hotel, and special use properties; affordable housing strategies; tax incremental financing; special service areas; New Markets Tax Credits, and financial projections.

Other clients include the University of Illinois at Chicago; Metra; Milwaukee County; Fort Wayne, IN; Peoria, IL; the STAR Line Steering Committee; other suburban municipalities; landowners; and private developers.

Steve served as series chairman for the Urban Land Institute Chicago District Council's "An Agenda for Growth of the Chicago Region" and has served on or chaired ULI-sponsored technical assistance panels for the north branch of the Chicago River, Aurora, Highwood, and Elburn. He serves on the boards of the Housing Opportunity Development Corporation, Family Focus, and Goddard College as well as the Board of Advisors of the Urban Land Institute Chicago District Council.



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His article “Developer Solicitation for Publicly Owned Land” appeared in the July 2005 issue of Public Management magazine.

He is a Counselor of Real Estate (CRE), a member of the American Institute of Certified Planners (AICP), and is a full member of the Urban Land Institute. He is a past chair of the ULI Chicago District Council and membership vice-chair of a ULI Urban Development Mixed Use Council “flight.”

He received a B.A. from Goddard College and an M.S. in Urban and Regional Planning from the University of Wisconsin-Madison.



Mark Funkhouser

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Dr. Mark Funkhouser is the Director of the Governing Institute. Prior to that, he was mayor of Kansas City, Missouri from 2007 to 2011. Funkhouser was the first government professional ever elected by Kansas Citizens to serve as their mayor. During his controversial term he relied heavily on his experience and training in public finance to lead the city back from the brink of bankruptcy. When he left office, the city's finances were in the best shape they had been in over a decade, a feat accomplished in the midst of the worst recession since the Great Depression.

Funkhouser began his career as a guard at George Junior Republic, a youth corrections facility in Grove City, Pennsylvania. He went on to work as a rehabilitation counselor with the Pennsylvania State Bureau of Vocational Rehabilitation and then as an assistant professor at Salem College in Salem, West Virginia, teaching social work and sociology. In 1978 he began a career as a performance auditor, first in Tennessee state government and then for the City of Kansas City, where he served as City Auditor from 1988 until 2006. Under his leadership, the City Auditor's Office won the Knighton Award for outstanding auditing in 1997, 2000, 2003, and 2004. GOVERNING recognized Funkhouser as one of its Public Officials of the Year in 2003.

While he was the City Auditor, Funkhouser also taught courses in public budgeting, program evaluation, policy analysis, public finance and related topics in the MPA programs of the University of Kansas and the University of Missouri at Kansas City. He has written extensively about government performance and accountability and spoken at numerous seminars and workshops throughout the world. His book, **Honest, Competent Government**, was the first global study of performance auditing. In addition, he has served on the editorial boards of several publications including the American Review of Public Administration and the Journal of Government Financial Management.

Funkhouser's academic training includes a bachelor's degree in political science from Thiel College, a master's degree in social work from West Virginia University, an MBA in accounting and finance from Tennessee State University, and an interdisciplinary PhD in public administration and sociology from the University of Missouri at Kansas City.

Mark was born in Pennsylvania and grew up in the hills of West Virginia. His father, a World War II veteran, worked in a chemical factory and his mother was a nurse. He is the oldest of five children. While teaching at Salem College, he met and fell in love with his wife, Gloria Squitiro. They have been married over 30 years and have two beautiful children. Their



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daughter, Tara, is 26 years old and has a master's degree in public administration from Georgia State University. Their son, Andrew, is 22 and is a senior in creative writing at the University of Missouri.

Jonathan Gouveia

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Jonathan is Senior Vice President at the New York City Economic Development Corporation and head of the Strategic Investments Group (SIG), the City's one-stop-shop for financing and incentives assistance and real estate location advisory services, which includes the NYC Industrial Development Agency, Build NYC Resource Corporation, NYC Capital Resource Corporation, among other programs. Before he was asked to lead SIG in 2011, Jonathan worked in NYCEDC's Real Estate Transactions Services division, where he led several major projects, including the acquisition of land for the Willets Point Development, the development of the Gotham Center in Long Island City, the expansions of Kaufman Astoria Studios and the American Museum of the Moving Image. Prior to joining NYCEDC in 2004, Jonathan worked in acquisitions and development at Brookfield Residential in Toronto.



Sarah Graham

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Sarah Graham is a Senior Associate with Strategic Economics, a consulting firm that provides the economic analysis and strategic thinking necessary to create sustainable, high-quality places for people to live and work. Ms. Graham specializes in assessing the economic and fiscal impacts of land use policies, with a particular focus on infill and transit-oriented development and has led Strategic Economics in developing new methodologies for measuring the fiscal and economic benefits of compact development and infrastructure

investment.

Ms. Graham manages a wide range of consulting assignments related to market analysis, fiscal impact analysis, and the funding and financing of public infrastructure. Recent projects include preparing a report for the U.S. Environmental Protection Agency on strategies for funding and financing infrastructure for transit oriented development; developing financing strategies for the Grand Boulevard Initiative, a regional collaboration in the San Francisco bay area dedicated to improving the 47-mile long El Camino Real corridor; and conducting a research effort funded by the Federal Transit Administration to understand the impact of transit on property values, and the potential to capture this value to pay for transit-related infrastructure and other community benefits. In addition Ms. Graham recently contributed to the Smart Growth America report: *Building Better Budgets, A National Examination of the Fiscal Benefits of Smart Growth Development*.



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Ms. Graham holds a Master's degree in Public Policy from the University of California at Berkeley, and a Bachelor of Arts in International Relations and Environmental and Economic Affairs from Tufts University.



Steve Johnson

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Steve Johnson leads CHFA's multifamily lending, Low Income Housing Tax Credit (LIHTC) allocation, and small business lending teams. Steve began working for CHFA in 1996 as a business finance loan officer. In 1999, he was promoted to manager of business lending production, where he successfully grew CHFA's production from \$10 million to over \$100 million annually. Most recently, Steve has strategically guided the small business team's efforts to diversify and expand the products available to help small businesses access capital following the economic decline. Steve says what drew him to CHFA and continues to be the

most rewarding part of his job is the opportunity to do "banking with a mission." Steve is the vice chair of the Colorado Enterprise Fund, and a board member of the Council of Development Finance Agencies (CDFA), a national organization designed to strengthen and support state and local economic development finance organizations. He graduated from Hillsdale College in Michigan with a Bachelor of Arts degree in marketing and finance. He resides in Broomfield with his wife Lynne and six children.



Peter Joseph

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Peter D. Joseph has served as Executive Director of the Association to Invest In the USA (IIUSA) – the not-for-profit industry trade association for the EB-5 Regional Economic Development Program (the "Program") - since December 2010. He oversees all day-to-day operations of IIUSA and its efforts to make the Program a permanent and effective tool of economic development in US public policy. He is a passionate advocate of the Program and effective leader, having overseen a long period of organizational growth to match that of the Program. IIUSA continues to be the voice of the Program and industry as a whole through

effective representation in public and government affairs. He is a frequent speaker on the EB-5 Program from a macro perspective.

Prior to his position Executive Director, Mr. Joseph oversaw IIUSA's administrative affairs since February 2008 – after years of substantive experience in the legal and private sectors of the Program. Mr. Joseph studied Social Studies and Spanish at Ithaca College for his Bachelor's degree and received his Master's degree in Leadership and Policy Studies from DePaul University in November 2012. He is an active member in the American Society of Association Executives and Chicago Council of Global Affairs.



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Emmett Kelly

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Emmett is a member in the Columbus office and practices in the Lending and Commercial Services and Government Services practice group. He has served as bond counsel, structuring counsel, underwriter's counsel, developer's counsel and purchaser's counsel for various taxable and tax-exempt project and revenue bond financings, including private activity bonds (IDB's), municipal, education, health care financings, renewable and alternative energy, and traditional general obligation, 501 (c)(3) issues.

He serves as bond counsel and special counsel on economic development financing and incentive projects utilizing tax increment financing, joint enterprise development districts, enterprise zones, energy special improvement districts, and community reinvestment areas. Emmett also serves as counsel to economic development entities such as community improvement corporations, new community authorities, regional planning commissions, convention facilities authorities, water and sewer districts, and port authorities on general, economic development and special obligation revenue financing matters. In the traditional general obligation area, he serves as bond counsel, underwriter's counsel and purchaser's counsel for general obligation, special obligation revenue bond and note financings for municipalities, school districts, counties, townships, port authorities, convention facilities authorities and other public sector entities.

In the area of property assessed clean energy (PACE), renewable and alternative energy projects and on P3 (public/private partnerships) transactions Emmett has served as legal counsel and as a consultant. He has worked on P3's, which have included tax increment financing, special assessments, private equity and assets, and governmental services and assets, for land development projects and public works.

Chris King

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Steven Klein has worked for nearly 30 years in infrastructure finance, investment banking and the credit markets. Since the early '90's he has served in a series of progressively more senior positions in three major participants in the financial guarantee, culminating in his work since 2000 as a co-founder of a new triple-A rated company, CFIG. While at those



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companies, Mr. Klein has served in senior business development, product development and as head of Global Infrastructure and governmental finance. Prior to his tenure at CIFG, Mr. Klein worked in senior management positions at Enhance Financial Guaranty (now Radian) and FGIC (owned by GE Capital at that time). Prior to his financial guaranty experience, Mr. Klein served as an investment banker at Donaldson, Lufkin and Jenrette (DLJ) as a senior banker in public finance, during which time he led several transactions totaling over \$1 billion for various state and local governments. Early in his career, Mr. Klein provided policy and program development consulting advice to over 15 state and local governments, under the auspices of a small Cambridge, MA based consulting firm. Mr. Klein received a J.D. from Boston University, a Masters in Public Administration from the John F. Kennedy School of Government at Harvard University and a B.A. from Haverford College.



Ryan Kozak

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Ryan Kozak is a Senior Managing Consultant in the Cleveland office of Public Financial Management. Ryan currently serves as advisor to a variety of state and local governments, colleges and universities, not-for-profits, and cultural institutions on matters such as tax-exempt debt structuring, derivative advisory, and public private partnerships. Ryan comes to PFM with 10 years of experience working with public sector and corporate entities.

Throughout his career Ryan has held positions of increasing responsibility at JP Morgan in Asset Management, and at KeyBank in Municipal and Corporate Interest Rate Derivatives. Ryan holds a Master's of Science in Financial Engineering from Kent State University, and a Bachelor's degree in finance from Ohio University. Most recently Ryan has held board positions with the Friends of Columbus Zoo and Aquarium, Local Matters, and he is a founder of Food Conscious Ohio. Ryan resides in Avon Lake, Ohio with his wife and two daughters.



Katie Kramer

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As Director of Education & Programs for the Council of Development Finance Agencies, Katie Kramer oversees the Council's expansive educational offerings through the CDFA Training Institute, which includes 10 training courses covering the basics of development finance, bonds, tax increment finance, revolving loan funds, seed and venture capital, and other development finance-related topics. She designed the curriculum for the Intro P3 Finance Course, and served as editor of the Innovation Finance Reference Guide and Tax Credit Finance Reference Guide. Ms. Kramer also manages the CDFA Training Institute's Development Finance Certified Professional (DFCP) Program.



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In addition, Ms. Kramer is responsible for managing all of CDFA's outreach and programming efforts including webcasts, field seminars, and design and communications activities. In her role, she interacts with thousands of development finance practitioners each year, guiding them through their professional development and understanding of the diversity of development finance programs. Previously, Ms. Kramer served as CDFA's Development Director for five years managing membership and sponsorship activities and assisting with the planning and marketing of CDFA's events and publications. She has published numerous articles for CDFA, including in the Council's Development Finance Perspectives magazine, and has also been a guest lecturer at the Ohio State University.

Before joining CDFA, Ms. Kramer worked in the Assessment Division at Ballard & Tighe, Publishers as Project Coordinator where she managed projects involved with the development of standardized language tests. Prior to Ballard & Tighe, Ms. Kramer was employed by Scripps College as Assistant Director of the Annual Fund where she organized fundraising campaigns for alumnae, parents, and students. She studied art history at Scripps College and is a graduate of Cleveland State University.



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Lester H. Krone, who joined Stern Brothers & Co. in 2009, is a Senior Vice President in the Firm's Alternative Energy Finance group. Prior to joining Stern Brothers he was a Managing Director in the Energy & Power Investment Banking group at Wachovia Securities. He began his investment banking career at A.G. Edwards & Sons, Inc. in 1987 where he was a Managing Director and Head of the Utility Group from 1992 to 2007. He successfully initiated and directed all aspects of A.G. Edwards investment banking practice in the investor-owned utility industry, bringing innovative solutions to over 70 electric, gas, water and alternative

energy companies. Les advised senior management teams and Boards of Directors on strategic issues including capital structure, mergers and acquisitions, and capital formation.

From 1997 – 2007 the A.G. Edwards Utility Group helped raise over \$30 billion of debt and equity capital for the U.S. investor-owned utility industry in over 200 transactions.

- 60 equity offerings (\$9.8 Billion), including 18 lead-managed transactions
- In the alternative energy industry, A.G. Edwards was a co-manager on the initial public offerings for Verasun Energy, U.S. BioEnergy and BioFuel Energy in 2006 and 2007 that raised over \$700 Million
- 79 retail debt and trust preferred offerings (\$13.9 Billion), including 12 lead-managed transactions
- 39 institutional debt offerings (\$4.7 Billion), including 9 lead-managed transactions
- 18 private placements and MTN programs (\$1.5 Billion)
- 15 completed merger and acquisitions assignments

In addition, Les has spoken at national conferences for the American Gas Association, the National Association of Water Companies, NARUC and the American Public Gas Association.

Prior to beginning his investment banking career, Les was a structural engineer who designed corporate, institutional and high-rise commercial real estate projects for Fortune 1000 companies, major institutions and commercial real estate developers. He received an M.B.A. from Harvard Business School, an M.S. in Civil Engineering from Washington



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University in St. Louis, and a B.S. in Architectural Engineering, with Honors, from the University of Colorado. He holds Series 7, 79 and Series 63 licenses, and is a registered professional engineer in Missouri.



Doug Lamb

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Doug Lamb is a partner in the Richmond office of McGuireWoods, and he represents issuers, borrowers, underwriters and lenders on a national basis in a wide range of tax-exempt, taxable and tax credit bond transactions with an emphasis on financings for solid waste, renewable energy, energy efficiency, economic development and other private activity bond projects as well as financing structures using public-private partnerships and new markets tax credits. Recently, Mr. Lamb has served as bond, lender's and underwriter's counsel on innovative financing structures using recovery zone facility and economic development bonds, gulf opportunity zone bonds, direct-pay bonds under the build America, qualified school construction, qualified zone academy, qualified energy conservation and new clean renewable energy programs, plus projects using various federal and state equity tax credits.

Mr. Lamb received his J.D. from the T.C. Williams School of Law, University of Richmond in 1998 and his B.A. from Washington and Lee University in 1993.



Ernesto Lanza

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Ernesto Lanza is Deputy Executive Director and Chief Legal Officer of the Municipal Securities Rulemaking Board (MSRB). Mr. Lanza oversees the MSRB's integrated approach to market regulation, technology and operational activities as well as serves as the MSRB's chief legal officer.

Previously, he led the design, development and initial launch of the MSRB's Electronic Municipal Market Access (EMMA) website, which serves as a free, centralized source for primary market disclosures, continuing disclosures, real-time trade price and interest rate data, market statistics and investor education for the municipal securities market.

He also led the MSRB's initial rulemaking and interpretive initiatives relating to broker-dealer activities in 529 college savings plans and has worked on a broad range of fair practice, suitability and disclosure issues relating to municipal securities.

Prior to joining the MSRB, Mr. Lanza was in private practice at Ballard Spahr, Greenberg Traurig and Holland & Knight. Mr. Lanza received a bachelor's degree in government from Harvard University and a law degree from the University of Pennsylvania Law School.



Speaker Biographies & Contact Information



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Bob Lind is Director of Business Finance for the City of Minneapolis Community Planning & Economic Development (CPED). He has worked for the City in various positions since 1979. Prior to 1979, he taught economics and business finance at the University of New Mexico in Albuquerque, where he received his M.A. degree in Economics. In addition to his work for the City, Bob has also served at the national level with the Council of

Development Finance Agencies, having served as the Chair of the CDFA Board from 1999 – 2002, he continues as a Board member and Chairs their federal Legislative Committee in Washington, D.C. Most recently at their 2011 annual summit in Boston, Bob was the 4th recipient of CDFA's Lifetime Achievement Award. Bob has a City license to raise chickens and currently has 12 brown egg laying chickens.



Marvin Markus

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Marvin is a municipal finance banker, whose primary responsibilities are in the areas where municipal finance intersects with other finance disciplines, including real estate, asset-backed and insurance finance. He joined Goldman Sachs in 1998 as a vice president and was named managing director in 2005.

Prior to joining the firm, Marvin worked for the City of New York Department of Housing Preservation and Development (HPD) as deputy commissioner in charge of the policy and intergovernmental functions. After that, he worked for 20 years as an investment banker, specializing in municipal and sovereign related financings. Marvin served as the head of Kidder Peabody's efforts in these areas between 1992 and 1995.

Following his governmental service, Marvin has remained active in the civic life of New York City. Between 1979 and 1984, he served as chairman of the New York City Rent Guidelines Board, having been appointed by Mayor Edward Koch. In 2002, Mayor Michael Bloomberg reappointed Marvin to that position, where he served until 2009. He also served as chairman of the New York City Council Redistricting Commission in 1982. Marvin is currently chairman of the board of the Citizens Housing and Planning Council, a citywide public policy research and advocacy group. He is a member of the board of the Settlement Housing Fund, the National Housing Conference, the New York Housing Conference and the Brooklyn Historical Society.

Marvin earned a BA in Urban Studies from Brooklyn College in 1969 and an MA in Urban Planning from New York University's Wagner School in 1974.



Speaker Biographies & Contact Information



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Karl Marschel practices in the areas of real estate development and public finance including acquisition, development and disposition of residential, condominium, commercial and industrial properties, as well as public-private partnership matters such as the financing of infrastructure and special district financings, tax increment and other redevelopment financing, economic development incentives and obtaining corporate incentives for large and small businesses. Mr. Marschel is experienced with all stages of the real estate development process including negotiating purchase and sale agreements, leasing, and the negotiation of acquisition and development financing. Mr. Marschel represents both private and public entities throughout the United States seeking to promote the development of properties and businesses as well as other business opportunities. Mr. Marschel has acted as bond, underwriter's, special counsel and private incentives counsel in bond and other financings related to public economic development efforts.



Mariza McKee

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Ms. McKee concentrates her practice on the representation of private and public companies in securities and corporate matters, including structured finance, mergers and acquisitions, and corporate governance. Her practice is focused on structuring, negotiating and documenting complex structured EB-5 financings. Ms. McKee counsels regional centers, private equity funds, developers, lenders, community development agencies and public agencies that manage or are otherwise involved with domestic and international private equity offerings seeking EB-5 investments.



Chris Meister

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As the Executive Director of the Illinois Finance Authority, Christopher Meister leads a staff of finance and legal experts that provide hands-on support to help Illinois businesses get the capital they need for growth.

Meister was appointed to head the IFA in December 2009 after two years as the agency's General Counsel and Deputy Director. His focus at IFA has been to develop creative new financing tools to help meet the



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needs of Illinois businesses seeking to create and retain jobs around the state. A frequent speaker and panelist before business groups, Meister actively markets IFA programs and services to reach the broadest possible sector of the business community.

Meister has a record of leadership in strengthening economic development statewide. He served as Legislative Director/Associate General Counsel for the Illinois Department of Commerce & Economic Opportunity, where his most notable achievement was drafting and securing passage of legislation for the Illinois Film Tax Credit. His private practice experience focused on municipal law and litigation, most recently at Holland & Knight LLP.

Meister is a Graduate of DePaul University and University of Illinois College of Law. He and his family live in Oak Park, Illinois.



Melissa Messina

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Melissa Messina is a seventh year associate in the firm's Baltimore office and a member of the firm's Transactional Finance Practice Group and Recruitment and Technology Committees. Melissa practices in the areas of public and commercial finance regularly representing banks, mezzanine lenders, issuers, underwriters, developers and trustees in various types of financial transactions.

In her commercial finance practice, Melissa's clients include national and regional financial institutions and mezzanine lenders. In representing her clients, Melissa documents, negotiates and closes asset-based, acquisition, middle market, private banking and real estate finance transactions.

As a public finance practitioner, Melissa represents issuers, underwriters, developers, borrowers and trustees in a variety of tax-exempt bond financings in Maryland and elsewhere. She is frequently involved in land-based infrastructure transactions, including special taxing district, community development authority and tax increment finance bonds. She was extensively involved in serving as bond counsel in one of Maryland's largest public-private partnership bond issues and has played a substantial role in numerous other bond transactions during her tenure as a public finance practitioner.

Melissa also serves as general counsel for one local non-profit organization and is a member of the Maryland Chapter of the Association for Corporate Growth, the Council of Development Finance Agencies and the National Association of Bond Lawyers.



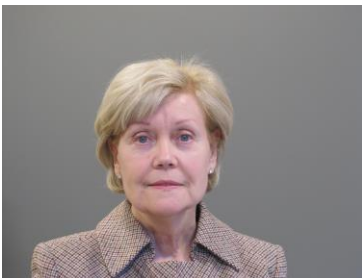
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Lewis Milford is the founder and President of Clean Energy Group (CEG), a national U.S. nonprofit organization that promotes effective clean energy policies, develops low carbon technology innovation strategies, and works on new financial tools to deploy clean energy technologies and stabilize greenhouse gas emissions. CEG concentrates on climate and clean energy issues at the state, national, and international levels, as it works with diverse stakeholders from governments as well as the private and nonprofit sectors. Mr. Milford also founded another nonprofit, Clean Energy States Alliance (CESA), a coalition of state and sub-federal entities that fund or administer clean energy programs; CESA is also managed by CEG. Through CESA, CEG assists states and municipal utilities to create and implement innovative practices and public funding programs to advance clean energy markets and project deployment. CEG and CESA have started and manage several new initiatives, including: a federal- state partnership to facilitate and accelerate process for siting and development of offshore wind projects; the Marine Energy Technology Acceleration Partnership (METAP), and the Energy Storage Technology Advancement Partnership. CEG/CESA also manages the State-Federal RPS Collaborative and the UNEP SEF Alliance. CEG also has prepared numerous reports which analyze the performance of state and utility clean energy financing programs over the past decade.

Mr. Milford is an attorney with over thirty years of public interest and environmental experience, having been an energy attorney, law professor and prosecutor. He has also written articles for publications including the Boston Globe, New York Times and Environmental Finance, and co-authored a nonfiction American history book published by Simon and Schuster.



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Ms. Molino is a co-founder and the Managing Partner at Bostonia Partners and has over 30 years of experience as an investment banker and finance professional. Ms. Molino has extensive capital markets experience focusing on real estate, energy, domestic project finance, and securitization markets. She has an extensive and unique background with securitizations and asset-backed financings, working with with government, corporations, real estate and energy clients, and has pioneered the introduction of a variety of credits into the capital markets. Ms. Molino has also served in the capacity of Financial Advisor and Investment Banker to several State, Municipal, and U.S. Government agencies on a variety of privatizations and public-private partnerships that involve securitizations. She has been involved with over \$3.5 billion of highly structured project financings.

Ms. Molino formerly served on the Federal Energy Management Action Committee, which was established by Executive Order 12123, to provide advice and guidance to the Department of Energy in achieving the energy efficiency goals of the Energy Policy Act of 2005. She has also served as a member of the planning committee for GovEnergy and is currently



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serving as co-chair of the Energy Council of the Association of Defense Communities, as well as the President of the National Council for Public-Private Partnerships where she also serves as Chairperson of the Energy Institute. Ms. Molino is a member of the Urban Land Institute where she serves on the Public Development and Infrastructure Council. Ms. Molino is a frequent speaker and guest lecturer at various industry conferences, and author of articles in trade publications on various financial topics including her contribution to Urban Land Institute's "Green Office Buildings, A Practical Guide to Development", 2005. Library of Congress: 2005904468.

Ms. Molino received her undergraduate degree in Electrical Engineering from Copenhagen University, Denmark and her master's degree in Industrial Technology from Northeastern University in Boston, Massachusetts.



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Rebecca Olsen is an Attorney Fellow in the Office of Municipal Securities (OMS) of the U.S. Securities and Exchange Commission which is responsible for coordinating the SEC's municipal securities activities and providing assistance both to other SEC divisions and market participants. As part of the OMS, Ms. Olsen is responsible for tracking developments in the municipal securities market, keeping the Commission informed about current and new market issues and providing advice on possible regulatory responses. She provides technical assistance in the development and implementation of major SEC rulemaking initiatives in the municipal securities area. She provides assistance to the other SEC offices and divisions with respect to surveillance of the market, enforcement and a wide array of municipal securities matters. As part of OMS, she is also responsible for acting as a liaison for the Commission to the Municipal Securities Rule Making Board and a variety of investor and industry groups on municipal securities issues.

Prior to joining the SEC, Ms. Olsen worked as public finance attorney at the law firm of Ballard Spahr LLP for over a decade where she served as underwriter's counsel, bond counsel, lender's counsel and borrower's counsel on a wide variety of public debt offerings and private placements. Her experience encompasses special assessment, tax increment and PILOT bond financings for large mixed use developments; fixed and variable rate revenue bond financings for educational, cultural and other 501(c)(3) organizations; multifamily housing revenue bond financings; exempt facility bond financings and GO Zone bond financings. She also has significant experience with securitization transactions. Ms. Olsen has a Bachelor of Arts degree in Political Science from Boston College, a Juris Doctorate from the Georgetown University Law Center and an LL.M. in International Business Law from the Vrije Universiteit in Amsterdam, The Netherlands.



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Michael Paparian is Deputy Treasurer for California State Treasurer Bill Lockyer. He has over 30 years' experience in environmental, energy and economic development issues.

As deputy treasurer, Paparian represents Treasurer Lockyer on the boards of various financing authorities, including: the California Health Facilities Financing Authority, the California Pollution Control Financing Authority (CPCFA), the California Educational Facilities Authority, the California School Finance Authority and the California Debt Limit Allocation Committee. In addition, he will represent Lockyer on the California Earthquake Authority board.

Before his appointment to deputy treasurer, Paparian served as CPCFA's executive director. Lockyer, as State Treasurer, chairs the CPCFA and appointed Paparian to the position in 2007. In the post, Paparian managed expansion of CPCFA's loan assistance program for small businesses, implementation of a \$60 million brownfield cleanup program, a partnership with the state Air Resources Board to help diesel truck owners upgrade their vehicles to meet clean air rules, and the launch of a financial assistance program for energy efficiency projects.

Prior to his 2007 CPCFA appointment, Paparian worked as the Sierra Club's California State Director and as a special consultant to the California Environmental Protection Agency. He also served as a member of the California Integrated Waste Management Board.

Paparian received degrees in biology and psychology from the University of California, Santa Cruz and a master's degree in environmental planning from the California State University system. He is married to attorney Kate Sproul and has two sons: Matthew, 21 and Christopher, 18.



Cory Phelps
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Cory Phelps is a 20-year veteran of the economic development and banking industries. Since November 2011 he has served as the economic development finance officer for Idaho Housing and Finance Association, where he manages the Idaho Collateral Support Program. In its first two years, the Idaho CSP has created or retained more than 1,000 jobs and supported more than \$83 million in private lending.

Earlier in his career, Mr. Phelps was a loan officer for the Eastern Idaho Development Corporation, helping small businesses access capital through various government programs. Before that, he spent 16 years in various capacities in



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the Idaho banking industry, including commercial loan officer and branch manager, relationship manager, and portfolio manager.

Mr. Phelps has served on the board of directors for several nonprofit agencies in southern Idaho and is a graduate of the Greater Pocatello Chamber of Commerce leadership program.

Sajan Philip

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Sajan Philip is a Loan Officer and Program Manager for the New York Healthy Food and Healthy Communities Fund (HFHC Fund) at the Low Income Investment Fund (LIIF). Mr. Philip joined LIIF in 2011 and moved into his current position in September, 2012. The HFHC Fund is a \$30 million public-private fund for food market capital projects, established to facilitate improved access to healthy food in underserved communities throughout the State of New York. Mr. Philip is responsible for the day to day management of LIIF's Healthy Food Financing Initiative (HFFI) and HFHC Fund capital deployment. His daily duties include marketing and originating new deals, underwriting and closing loans, and general program management. Prior to becoming a Loan Officer, Sajan was working on LIIF's Asset Management team monitoring a \$140 million portfolio of commercial housing, charter school, and community facility acquisition, construction, and permanent loans. Before joining LIIF, Sajan was a Commercial Loan Underwriter with a Community Development Financial Institution for five years focusing on small business lending. Sajan graduated from the University of Delaware in 2006 with a BA in Economics and Political Science.

Tony Portuondo

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Antonio Portuondo, is a Managing Director and Board Member of The Bank of New York Mellon Trust Company N.A., a subsidiary of The Bank of New York Mellon Corporation. Tony manages the Bank's Corporate Trust Public not for Profit Sales and Relationship Management Team. Primary responsibilities include relationship management, risk, new business, and client service delivery.

Prior to his current role, Tony managed the Corporate Trust Public Finance business and also served as the Public Finance Chief Administration Officer initiating and leading strategic initiatives, as well as managing its Best Practices program.

Tony has more than 18 years of corporate trust experience holding various business administration, business development, and management positions. He received an undergraduate degree in Political Science from the University of Florida, and a Master of Public Administration specializing in Public Finance from Florida International University.



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Ms. Radcliff is a Senior Vice President in the Public Finance Department of St. Louis-based Stifel, Nicolaus & Company, Incorporated. Prior to joining Stifel, Nicolaus in 2008, Ms. Radcliff spent 14 years at another investment bank. During her career, Ms Radcliff has served as investment banker on more than 300 bond issues with a total par amount of nearly \$16 billion.

With a background in urban planning and economic development finance, Ms Radcliff's primary investment banking focus is on economic development finance. She has served as the lead investment banker for tax increment financing ("TIF") and other development district financings throughout the country. Ms Radcliff has lectured extensively on the topic of development financing to a wide range of audiences, including the American Bar Association, the Council of Development Financing Agencies, several individual state agencies and municipal organizations, and numerous real estate and economic development organizations. She is a member of the board of the Council of Development Financing Agencies. Ms. Radcliff holds a Bachelor of Science degree in Urban Planning from Michigan State University and she earned a Masters of Public Affairs degree from Princeton University.



Pat Ray
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Mr. Ray has nationally recognized expertise as bond counsel, underwriter's counsel and special tax counsel, representing clients throughout the United States. He has represented corporate and municipal bond issuers, tribal entities, EB-5 lenders, nonprofit corporations and investment banks in connection with the structuring, issuance and sale of taxable and tax-exempt multifamily and single-family housing bonds, health care bonds, tribal bonds, charter school bonds, collateralized mortgage obligations, small-issue industrial development obligations, traditional governmental obligations, large infrastructure financings and registered public offerings.

His areas of expertise include municipal bonds, new markets tax credits, tribal finance, and the EB-5 alien finance program. A frequent speaker at national public finance conferences, Mr. Ray serves on the Board of Directors of the Council of Development Finance Agencies.



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Scott Richbourg manages the Public Finance Department. Prior to joining BAM, he was Executive Director and Manager of the Southern Group for Public Finance at Morgan Stanley with responsibility for all municipal underwriting activity in the region. Before that, he was Managing Director of the U.S. Municipal Finance Department at FSA, which he joined in 2001. In the position, he was the head of strategic planning, business development and underwriting across all financial guaranty sectors of the municipal market, including both primary and secondary issues. Earlier, he was Vice President and Co-Head of the Infrastructure Group at Goldman Sachs and an investment banker at PaineWebber. He holds a B.A. in Economics from James Madison University.



Nessa Richman

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Brightseed Strategies founder, Nessa Richman, has been working as a food systems consultant since 2002. She often works with umbrella organizations, assisting their stakeholder groups in understanding issues related to sustainable agriculture and food enterprise, local/regional food marketing chains, and low-income food access. She was a sub-contractor for the Treasury Department's Community Development Finance Institution (CDFI) Fund "Financing Healthy Food Options" Capacity Building Task Order. In this role she developed educational training materials, organized "Meet the Practitioner" panels for workshops, and created follow-on technical assistance resources for CDFIs.



Toby Rittner

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Mr. Rittner runs the day-to-day operations of the Council of Development Finance Agencies (CDFA), which includes management of a 32 member Board of Directors, and the organization's various educational, advocacy and research initiatives. Rittner is a frequent speaker at local, state and national conferences and events focused on economic development finance. He has been featured extensively in The Bond Buyer and other national media publications concerning the advancement of development finance tools. He is the author of CDFA's highly acclaimed Practitioner's Guide to Economic Development Finance and

an adjunct faculty member at the Ohio State University teaching planning for sustainable economic development in the Knowlton School of Architecture.



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Rittner is a Development Finance Certified Professional (DFCP) through CDFA and is a Certified Economic Development Finance Professional (EDFP) through the National Development Council (NDC). Rittner has also advised state and federal government leaders, including President Obama's Administration Transition Team, on economic development finance policy and focus.

Prior to joining CDFA, Mr. Rittner was the Director of Legislative Affairs and former Director of Training for the International Economic Development Council (IEDC). Mr. Rittner has also worked for the Franklin County, Ohio Board of Commissioners, Community and Economic Development Department as a Senior Program Coordinator for Economic Development and as an Associate Planner for the City of Gahanna, Ohio.

In 2011, Mr. Rittner was appointed to the U.S. Environmental Protection Agency's Environmental Financial Advisory Board. He is a member of the Advisory Board for the National Community Fund I, LLC and is also a member of the Advisory Board for Heritage Ohio. Mr. Rittner holds a Bachelor of Arts in Political Science and a Master's of City and Regional Planning degree from the Ohio State University.

Tom Rosenfeld

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Mr. Rosenfeld founded CanAm in 1987 in response to the newly created Canadian Business Immigration Investor Program and was actively involved, originally focusing his sales efforts in the Canadian market. Actively involved in structuring and promoting private and government syndicates pursuant to the Canadian Program, CanAm eventually became the exclusive promoter of the Provinces of Prince Edward Island and New Brunswick.

Since 2002, Mr. Rosenfeld has established CanAm's presence in the United States, where it has become a leader in the U.S. EB-5 Immigrant Investor Program. Through Mr. Rosenfeld's vision and leadership, CanAm has become the exclusive sponsor of four regional centers designated by the United States Customs and Immigration Service, including the City of Philadelphia, the Commonwealth of Pennsylvania, the State of Hawaii and the City of Los Angeles.

Mr. Rosenfeld began his career at Price Waterhouse (currently PricewaterhouseCoopers) in Philadelphia, where he had income tax and audit responsibilities for major clients, and authored a number of the firm's educational publications. In 1983, Mr. Rosenfeld left Price Waterhouse to become a partner at a New York-based real estate syndication firm, where he remained until founding CanAm Enterprises in 1987.

Mr. Rosenfeld is an attorney and certified public accountant. He earned both a Bachelor's degree in Business Administration and Juris Doctorate from Temple University in Philadelphia.



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John Saris is the Business Services Manager at Business Oregon. The mission of Business Oregon is to create, retain and attract businesses that offer living wage jobs for Oregonians. As the Business Services Manager, John oversees the state's Business Finance programs, the Office of Minority, Women and Emerging Small Business, and the Business Support programs. The Business Finance team administers the business development loan programs, loan-guarantee programs, and Industrial Development Bond program. Through partnerships with lenders in Oregon, these programs promote job creation and retention through various types of debt financing made available to businesses that may not otherwise be eligible. Prior to joining Business Oregon in 2009, John's previous experience includes eight years with U.S. Bank, most recently as a regional SBA Business Development Officer serving the rural markets of Oregon, SW Washington and Northern California. As a Business Development Officer, John helped businesses navigate obstacles common to small businesses in various stages of start-up, expansion, restructure and acquisition. This experience led John to pursue opportunities with the public sector to help increase opportunities for small business growth and development.



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John Sassaris is a Senior Vice President / Commercial Division Head, at MB Financial Bank in Chicago. John has been with MB since 1992, and has been focused on the tax-exempt marketplace since 2000, when he formally created the Bank's tax-exempt bond group. John continues to manage a division that looks to build relationships with middle-market companies in the Midwest, non-profit organizations in the Bank's geographic footprint, and all functions within specialized finance, including all tax-exempt activities.

John received his Bachelor's from Northeastern Illinois University, and his MBA from DePaul University in Chicago. He is currently on the Advisory Board for DePaul's College of Commerce, and a member of both the Illinois Network of Charter Schools and the Council of Development Finance Agencies.



Speaker Biographies & Contact Information



Linda Schakel
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Linda B. Schakel is a partner in the Tax Group of Ballard Spahr Andrews & Ingersoll LLP in the firm's Washington, DC office. She specializes in tax-exempt bond financing. From May 1995 to August 1997, Ms. Schakel served as Attorney-advisor, Office of Tax Policy, United States Treasury Department. At the Treasury Department she was the specialist in tax-exempt bonds, low-income housing tax credit, empowerment zones and enterprise communities, District of Columbia federal tax incentives, the work opportunity tax credit and the welfare-to-work tax credit. Ms. Schakel is the Immediate Past President of the National Association of Bond Lawyers and a member of the American Bar Association.

Ms. Schakel received her J.D. in 1986 from Georgetown University Law Center, her graduate degrees in education from University of South Florida (M.A., 1976; Ph.D., 1984), and her B.S. from Iowa State University in 1970. She is admitted to the bars of the District of Columbia and Maryland.



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Eric Silva serves as one of CDFA's Legislative Representative in Washington, DC. Eric has been an instrumental part of CDFA's legislative workings. Silva is with the Washington, DC based law firm of Winston & Strawn.

Eric Silva is an associate in the firm's Washington, D.C. office. His practice is rooted in a thorough understanding of the federal legislative and regulatory processes, enabling him to successfully represent clients as an advocate and strategic counsel before the United States

Congress and the Executive Branch. Mr. Silva regularly assists corporations, trade associations, government entities and stakeholder coalitions in drafting legislation, commenting on proposed federal agency rules, and coordinating advocacy campaigns.

Mr. Silva has significant experience in a number of policy areas, including tax, financial markets, health care, the environment, agriculture and trade. Most recently, Mr. Silva has successfully advocated for client interests on some of the most significant pieces of legislation to pass the Congress, including the Dodd-Frank Wall Street Reform Act, the Affordable Care Act, the American Recovery and Reinvestment Act, and the 2008 and 2012 Farm Bills.



Speaker Biographies & Contact Information



Scott Sittig

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Mr. Sittig was named Associate Director in January 2013, and except for a brief period has been a member of the CGR staff since 2007. In early 2011 he served the Rochester City School District as a Principal Management Analyst, helping the district transition to an equitable student funding model. Prior to joining CGR in 2007, Mr. Sittig served as an executive pastor, where he focused on strategic change. Previously he was executive director for a group of physicians serving the underserved, where he helped guide a strategic planning process that led to creation of a state-licensed medical and diagnostic treatment center. Other

career experiences include serving as a consultant to a major social service organization and as vice president of finance and operations for a Chicago-based mission, where he helped facilitate the organization's expansion to another state and overseas.

Mr. Sittig's particular interest is helping leaders of local governments and nonprofit organizations identify measures that both save money and better allocate scarce resources. He is skilled at finding solutions to fiscal, economic and local government issues. In 2010, his work as project manager on a two- part, two-year study for the community of Seneca Falls NY was recognized with a national award from the Governmental Research Association. The national group awarded its Outstanding Policy Achievement Award to CGR for examining ways to reduce the cost of government to stimulate economic growth in the community, and subsequently for helping develop a dissolution plan for the village. Mr. Sittig also speaks to community groups about the state of the NY and U.S economy.



Jim Snyder

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Jim Snyder's primary practice concentration is municipal finance, with an emphasis on economic development transactions such as those involving tax-increment financing and public/private partnerships. Snyder is a frequent speaker on bond issues that involve economic development and new bond programs under recent legislation such as the Stimulus Act.

He regularly serves as bond counsel, underwriter's counsel, bond purchaser's counsel and special counsel on a variety of public finance transactions, including general obligation financings, revenue obligations, special service area and special assessment financings, tax increment bond financing, industrial development revenue bonds, multifamily housing financings, solid waste disposal facility bonds, Section 501(c)(3) revenue bond financings, and recovery zone bonds and Midwest disaster bonds. Jim also sits on the CDFA Board of Directors.



Speaker Biographies & Contact Information



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Lee Sobel is RCLCO's Director of Public Strategies, a position that blends his expertise in real estate and finance with his knowledge of land use and transportation policy. He has been a commercial real estate broker with CB Richard Ellis, in South Florida, and he spent 10 years handling real estate development and finance matters with the U.S. EPA's Office of Sustainable Communities in Washington, D.C. He is a recognized expert in urban retail, market analysis, economic development, and smart growth.

During Lee's tenure in the public sector, he provided technical assistance, policy research and development, and implementation strategies to local governments, quasi-governmental entities, community groups, and national and local advocacy organizations on real estate, finance, and economic development issues with the goal of achieving sustainable community development. At the EPA, Lee authored and co-authored publications that reflect this work, including Infrastructure Financing Options for Transit-Oriented Development, Smart Growth and Economic Success, Market Acceptance of Smart Growth, and This Is Smart Growth. At CB Richard Ellis, Lee brokered the acquisition and disposition of land, retail, and office properties on behalf of institutional, national, and private clients. He also provided opinions of value and market analytics for positioning and repositioning income properties. While a broker, Lee authored the first book dedicated to redeveloping shopping malls into mixed-use town centers, Greyfields into Goldfields: Dead Malls Become Living Neighborhoods.

Lee is a nationally recognized speaker. He has given approximately 100 speeches and presentations on real estate, finance, economic development, and smart growth, in the past eleven years to local governments, organizations, agencies, and communities, including the International Council of Shopping Centers, the National Association of Home Builders, the National Association of Industrial and Office Properties, The National Association of Realtors, and the Urban Land Institute.



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Moniquea Spencer is Chief Program Officer for Finance Fund, a statewide non-profit financial intermediary committed to bridging resources with low- to moderate-income communities. She is responsible for the administration, management and deployment of Finance Fund's multiple lending and grants programs. She has significant expertise in the New Markets Tax Credit Program, having been directly responsible for closing over \$82.5MM in loans during her tenure.



Speaker Biographies & Contact Information

Ms. Spencer has over 20 years of experience in banking and finance. Prior to joining Finance Fund in 2009, she worked as a Senior Commercial Real Estate Portfolio Manager and Small Business Lender. As a Portfolio Manager, she managed a \$250M commercial real estate portfolio, including retail, office and residential projects. As a Business Banker, she received numerous sales awards for top production and portfolio growth, and was featured for three years in local commercial advertising for Huntington Bank's small business lending group.

Ms. Spencer specializes in loan enhancement programs including SBA and IRP loans. She was instrumental in the success of Huntington's Hometown Partnership, an internal initiative to support Mayor Michael B. Coleman's America's 21st Century City Partnership.

Ms. Spencer holds a Bachelor of Science degree in Business Administration from The Ohio State University. She is a member of the New Markets Tax Credit (NMTC) Coalition and Community Development Financial Institution (CDFI) Coalition. Her community activities include service as a PTO member and as president of the athletic boosters for the Berwick Alternative School.

Steve Strnisha

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Mr. Stephen Strnisha offers 20 years of leadership experience in bond rating analysis, investment banking, finance and economic development leadership on behalf of both local government and the non-profit sector. He joined PMC in May, 2009, where he continues to serve long standing clients as well as new ones.

In 2005, Strnisha founded Strnisha Development Advisors, providing assistance in obtaining public/private financing for real estate development. assisting clients with identifying financing and other strategies necessary to facilitate project objectives. His clients included Developers Diversified Realty, University Circle Inc., The Coral Company, The Detroit Investment Fund and various government entities. Most recently he has secured financing for the Flats East Bank Redevelopment in downtown Cleveland and the University Lofts project as part of the College Town development adjacent to Cleveland State University.

Prior to launching SDA, Strnisha served as Greater Cleveland Partnership's Chief Finance and Economic Development Officer, from its creation through the 2004 merger of Cleveland Tomorrow, Greater Cleveland Growth Association and the Greater Cleveland Roundtable. Strnisha led the economic development activities and financial integration of the three organizations and its combined \$27 million annual budget.

Before the 2004 merger, Strnisha was deputy director of Cleveland Tomorrow, a membership organization of CEOs of the 50 largest Northeast Ohio corporations focused on regional economic development initiatives. Strnisha staffed the business sector's role in building the Cleveland Browns stadium, its sponsorship of Cleveland Civic Vision and Beyond - a new downtown planning process, and Connecting Cleveland, a plan to redevelop Cleveland's lakefront. Additionally, he managed Cleveland Tomorrow's various real estate development funds which raised \$67 million in capital from private investors. In 2003, Cleveland Tomorrow also received a \$15 million New Markets Tax Credit allocation from the U.S. Department of Treasury in the first round of awards for that program.



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Strnisha also served as Director of Finance for the City of Cleveland under Mayor Michael White before being appointed Executive Assistant for Development. During his tenure with the City (1991-1995), he led the city's financing efforts, directing the sale of over \$600 million in city debt and managing the city's financial participation in the development of the Gateway Sports complex (which includes Jacobs Field and Gund Arena) and the Rock and Roll Hall of Fame and Museum. He also assisted in the development of both downtown and neighborhood housing and retail projects of scale and coordinated the City's successful application in the initial round of Empowerment Zone designations by the Federal Government.

Strnisha managed a start-up public finance division for Society Bank (now Key Bank) and served as senior analyst for public finance at Moody's. Strnisha began his professional career as a senior analyst for Fiscal Planning Services Inc.



David Wallace

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Mr. Wallace serves as Chief Executive Officer and Secretary of General Partner and Chairman of the Investment Committee for Wallace Bajjali Development Partners, L.P. Mr. Wallace has a background in the acquisition and/or formation of over 100 companies and/or partnerships, and has secured hundreds of millions of dollars in equity and debt. As a result of the numerous portfolio holdings, he has served on the boards for several private and public companies. Mr. Wallace served as a partner and Chief Executive Officer of Wallace & Associates Investment, Inc., formerly The Markpoint Company, a venture capital and merchant banking operation and also, the Grantham Company, a private investment-banking firm.

Prior to becoming a member of the Wallace Bajjali Development Partners management team, Mr. Wallace served as the Chief Financial Officer for Asset Plus and Asset Campus Housing. In such capacity, he was actively involved in the transactional structuring, investment banking and capital market activities.

Early in his career, Mr. Wallace served as the Vice President of Equity Management Corporation, a private real estate syndication firm. In this capacity, Mr. Wallace was responsible for the acquisition and/or sale of over \$250 million of income producing properties. In connection with such real estate activities, he was a charter member of the North Texas Association of Real Estate Professionals, a former member of the Real Estate Securities and Syndication Institute (RESSI) and a former member of the American Association of Financial Planners.

Mr. Wallace considers charitable works of great importance, as reflected by his extensive efforts in both the Dallas and Houston communities. Mr. Wallace served three terms as Mayor of the City of Sugar Land, Texas, where he previously served on city council representing the Single Member District Number 4. In such capacity, Mr. Wallace played a leadership role at the United States Conference of Mayors where he served on the Executive Committee and as Co-Chairman of the National Homeland Security Task Force and the Urban Water Council. Mr. Wallace served on the U. S. Department of Homeland Security Advisory Council-State and Local Officials Senior Advisory Committee and on the Board of Directors as Vice President of the TexasOne Economic Development Corporation. Mr. Wallace serves on the Advisory Board of the National Center for Missing and Exploited Children and was



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appointed as Research Scholar for Economic Development of the International Council of Shopping Centers. Most recently, he is the author of Retail Development through Public-Private Partnerships (ICSC).

Mr. Wallace received his Bachelor of Business Administration in Real Estate Finance from the University of North Texas. In addition to this schooling, Mr. Wallace attended Union College in Schenectady, New York and received a scholarship to study International Real Estate, International Finance and International Law at the University of Reading located in Reading, England.

Michael Wallace

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Michael Wallace is Program Director for Community and Economic Development at the National League of Cities, an organization dedicated to helping city leaders build better communities. Working in partnership with 49 state municipal leagues, NLC serves as a resource to and an advocate for over 19,000 cities, villages and towns.

As a member of the Federal Relations team, Michael works closely with mayors, council members, and municipal staff to represent local priorities in the areas of housing, community development, and economic growth.

Prior to joining NLC, Michael worked for U.S. Congresswoman Julia Carson (IN) managing House Financial Services Committee assignments.

Michael graduated from Marian University in Indianapolis, Indiana, with degrees in philosophy and theology. He moved to Washington to intern for NETWORK: A National Catholic Social Justice Lobby and to run the Llewellyn Scott Catholic Worker House.



Dafina Williams

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Ms. Williams joined Opportunity Finance Network (OFN) in 2006 and is responsible for OFN's research relating to opportunity finance policy at the state and federal level. She also coordinates the organization's grassroots advocacy efforts and assists in framing the organization's federal policy priorities. She has published numerous reports and contributed to several community development finance publications, including OFN's 2008 policy book, *The Next American Opportunity: Good Policies for a Great America*. Dafina is a magna cum laude graduate of Temple University, where she received a BBA in Economics.



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Christopher C. Woodin is a Lead Tax Law Specialist with the Office of Tax Exempt Bonds, Compliance and Program Management of the Internal Revenue Service. He started working in tax exempt finance nineteen years ago and has spent the past eight years with the Internal Revenue Service. He works primarily on matters involving arbitrage compliance, yield restriction and rebate, including recoveries of overpayments. He also works with issuers to resolve various violations through the voluntary closing agreement program.



John Wooten

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Mr. Wooten leads Wells Fargo's Municipal Placements division responsible for transactions involving corporations, 501(c)(3) organizations, and municipalities issuing tax exempt and taxable bonds. He has more than seventeen years' experience in consulting, providing financial analysis, and completing transactions for clients. John works with local authorities, bond counsel, and others to successfully manage underwritings, private placements, and refundings. A majority of his time is spent educating Wells Fargo's clients and prospects on the benefits of bond finance.

He earned a Master of Business Administration at the George Washington University and a Bachelor of Science in Business Administration degree from the University of South Carolina. Mr. Wooten has qualified as a General Securities Principal, Municipal Securities Principal, Municipal Securities Representative, General Securities Representative, and State Agent; having passed the Series 24, 53, 52, 7, and 63 qualification exams.