



*This year's Conference promises to be quite* **illuminating**

The 13th Annual HJ Sims  
**Late Winter Conference**  
on Financing Methods & Operating Strategies in the  
Senior Living Industry for Non-Profit and Proprietary  
Senior Living Providers

**Walt Disney Grand Floridian Resort & Spa**

Lake Buena Vista, FL

**February 23-25, 2016**

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SIMS** FINANCED RIGHT®

# About the Sims 2016 Conference

**THE SIMS 2016 LATE-WINTER CONFERENCE** will highlight how senior living organizations succeed in today's competitive environment. We've prepared a **COMPREHENSIVE AGENDA** which will address financing methods and operating strategies designed to meet the challenges that exist in both the not-for-profit and for-profit sectors of the senior living industry.

A roster of **OUTSTANDING SPEAKERS** will participate in the educational sessions. Breakout sessions, panels and roundtables will provide a forum for exchanging ideas and information. Our Conference format will also provide invaluable **NETWORKING OPPORTUNITIES**.



The objective of the Sims Late Winter Conference is for industry participants to **LEARN AND DISCUSS** each other's strategies and solutions for success. We're pleased to offer both CEU and CPE credits for the educational sessions.

## Walt Disney Grand Floridian Resort & Spa

Our 2016 Conference will take place at the Grand Floridian Resort & Spa in Disney World, Orlando (Lake Buena Vista), Florida. The hotel is on the monorail and has its own beach, pools, recreational facilities and spa.



## Special Guest Speakers

Guest speakers will include a speaker from the **DISNEY INSTITUTE**, who will describe Disney's approach to employees. The presentation will include:

- How to create and sustain a strong culture that fosters employee loyalty and engagement
- How to engage the hearts of employees – creating a culture of commitment
- How communication is the loudest signal of culture that an organization can send
- How to select employees
- How Disney develops its people

**LEO P. GROHOWSKI**, Executive Vice President and Chief Investment Officer of BNY Mellon Wealth Management. He leads all investment strategy and investment management functions for the wealth management organization. Previously, he was Chief Investment Officer of U.S. Trust and Deutsche Bank in the Americas. He will speak about a variety of topics including his overall economic outlook, asset allocation, overlooked assets for investment, selecting managers for various asset classes and how to evaluate the managers.

**RANDALL ROMES**, CISSP, CRISC, MCP, PCI-QSA, a Principal in the information security services and financial institutions groups at CliftonLarsonAllen LLP (CLA), leads a team of technology and industry specialists who provide IT audits and security assessments for clients in a wide range of industries. As a consultant at CLA for more than 17 years, he has been responsible for managing the firm's PCI-QSA audit practice and providing hands-on leadership for the ever-expanding forensic and incident response services. He will discuss risks and trends in cybercrime and the targeting of small and medium sized organizations; he will explain how "hackers" break in, including pre-text phone calls and e-mail attacks. He will also provide specific examples of how to counter cyber attacks, plus 10 keys to mitigate risk.



# Recreation & Special Activities

## World-Class Golf

**Tuesday, February 23, 8:00 a.m.**

Golf enthusiasts will have the opportunity to participate in a tournament on Disney's Magnolia Golf Course. It is rated 4 stars by *Golf Digest*. Named for its magnificent magnolia trees, the course is certified by Audubon International as a Cooperative Wildlife Sanctuary.



## Miniature Class Golf

**Tuesday, February 23, 10:00 a.m.**

We will also hold a miniature golf tournament at the Fantasia Gardens Miniature Golf Course, which is based on the Disney movie, *Fantasia*.

## Bass Fishing Tournament

**Tuesday, February 23, 10:00 a.m.**

For fishing enthusiasts, we'll have a number of 6-person, guided pontoon boats. The bass in Disney waters are said to be plentiful.

## Guided Jet Ski Tours

**Tuesday, February 23, 10:00 a.m.**

For those who prefer the fast lane, we'll have guided tours of Disney's waters on jet skis.



## Networking

**Tuesday, February 23, 4:30 p.m.**

Disney's Grand Floridian Resort & Spa

## Opening Night Reception & Dinner

**Grand Floridian Resort | Tuesday, February 23**

7:00 p.m. Reception – Summer House at Grand Floridian

8:00 p.m. Dinner – Grand Floridian Ballroom

## Special Evening Event Reception & Dinner

**Wednesday, February 24**

6:00 – 7:00 p.m. – Reception on the Italy Isola terrace at the Pavilion at Epcot

7:00 – 8:30 p.m. – Dinner in the American Adventure Rotunda at the American Pavilion at Epcot

8:30 – 9:30 p.m. – Dessert Party at the Italy Isola Terrace with view of "Illuminations", a fantastic show of lights, music, lasers and fireworks above the World Showcase Lagoon.



## Tuesday, February 23

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- 8:00 a.m.** ..... **Golf Tournament** – at Disney’s Magnolia Golf Course  
(Shotgun Start 8:00 a.m. Please check in by 7:30 a.m.)
- 10:00 a.m.** ..... **Miniature Golf** – on Fantasia Gardens Miniature Golf Course
- 10:00 a.m.** ..... **Bass Fishing Tournament** on Pontoon Boats
- 10:00 a.m.** ..... **Guided Jet Ski Tours**
- 4:30 p.m.** ..... **Networking** – Disney’s Grand Floridian Resort & Spa
- 7:00 p.m.** ..... **Opening Night Reception & Dinner** – Disney’s Grand Floridian Resort & Spa

## Wednesday, February 24

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- 7:30 - 8:30 a.m.** ..... **For CFOs – A Special Networking Breakfast**  
Both Non-Profit and Proprietary CFOs are invited to meet each other and discuss important issues. Each breakfast table will be hosted and will combine CFOs from both industry segments.
- 7:30 - 8:30 a.m.** ..... **Breakfast & Networking**
- 8:40 - 8:50 a.m.** ..... **Welcome & Introduction**
- 8:50 - 10:00 a.m.** ..... **General Session**  
***The Senior Living Industry & Capital Markets Today & Tomorrow.***  
An expert panel will discuss and debate the most efficient and affordable ways to finance development and acquisitions today and in the near future, including a review of Sims’ most interesting and creative financings.
- 10:00 - 10:30 a.m.** ..... **Networking Break**
- 10:30 - 11:45 a.m.** ..... **Breakout Sessions**
- I. The New World of Skilled Nursing.***  
As state budgets continue under pressure and Medicaid reimbursement stagnates or declines, how are nursing homes prospering today? Leading providers will describe how they are instituting new programs, expanding offerings specializing in more complex services and taking ownership of companies which provide managed care.
- II. Overlooked Markets for New Development.***  
Senior living competition is heating up in many primary markets with more new developments. At the same time, certain secondary markets are underserved by aging communities. Learn how successful operators choose the right markets for their new products.

11:45 a.m.-1:00 p.m. **Lunch & Networking**

1:00 -2:30 p.m. **General Session**  
*Disney's Approach to Selection, Training & Engagement of Employees*  
**GUEST SPEAKER FROM DISNEY INSTITUTE**

2:30 -3:00 p.m. **Networking Break**

3:00 -4:00 p.m. **Breakout Sessions**

***I. Innovative Memory Care Programs & Services.***

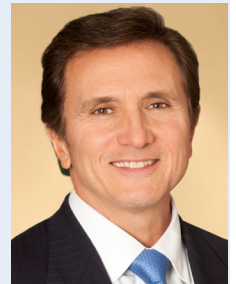
Memory care is a rapidly expanding service in the senior living industry. As a relatively young product, memory care still offers tremendous opportunity for new ideas. Hear all about the most successful ones.

***II. Ancillary Business Success Stories.***

Providing services to seniors is a broad industry description. Many senior living organizations are using their reputations in communities to offer additional ancillary services to increase cash flow and the quality of offerings to seniors. Home health care has been one of those services for over a decade. Learn about others from innovative organizations.

4:00 -4:15 p.m. **Networking Break**

4:15 - 5:15 p.m. **General Session**  
*Investment Strategies for Individuals & Organizations*  
**GUEST SPEAKER: LEO P. GROHOWSKI,**  
*Executive Vice President and Chief Investment Officer,*  
*BNY Mellon Wealth Management*



5:15 - 5:45 p.m. **Informal Discussion on Investment Strategies**

Join Leo Grohowski for drinks and some informal give and take on investing.

6:00 - 10:00 p.m. **Special Evening Event at Epcot**

Reception, Dinner and Dessert Party with view of "Illuminations".  
Transportation will be provided.

# Thursday, February 25

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7:00 - 8:00 a.m. ..... **Breakfast & Networking**

8:00 - 9:00 a.m. ..... **General Session**

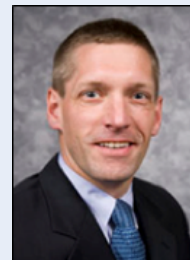
*Cyber Security for Your Organization*

**Guest Speaker - RANDALL ROMES,**

CISSP, CRISC, MCP, PCI-QSA

Principal

CliftonLarsonAllen LLP



9:00 - 10:15 a.m. ..... **General Session**

*Let's Hear From the Leaders: Setting Themselves Apart.*

Both the Non-Profit and Proprietary segments of the senior living industry have extraordinary leaders. Five of them will discuss their organizations' leadership in various aspects of our industry.

10:15 - 10:45 a.m. ..... **Networking Break**

10:45 a.m. - 12:00 p.m. ..... **General Session**

*Developing, Designing, Operating & Financing Moderately Priced Rental & Entrance Fee Communities.*

The senior living market below high end and above subsidized housing is vast but difficult to access because of the costs of new development. Hear from one expert each in development, design, operations and financing on how to create an efficient, value-oriented, high quality experience in a new senior living community.

12:00 p.m. ..... **Lunch & Conclusion of Conference Sessions**

Boxed Lunches will be provided outside the meeting rooms.



## Register for the Sims 2016 Conference

Please call or email Anita Clavin at **203.418.9005** or [aclavin@hjsims.com](mailto:aclavin@hjsims.com) with any questions or requests for additional information. Register online at [hjsims.com/register](http://hjsims.com/register) or mail or fax your registration form to Anita Clavin (Fax: 203.256.2377). Please mail the check for your registration fee (we're unable to accept credit cards) to: Anita Clavin, HJ Sims, 2150 Post Road, Fairfield, CT 06824-5669.

### Registration Fee:

Senior Living Community Owner or Management: **\$295** for first registrant, **\$195** for each additional registrant

Board Member: **Complimentary Registration**

Others: **\$795**

There will be an additional **\$75 fee** for participation in the Golf Tournament, Bass Fishing Excursion or Personal Watercraft Tours. Miniature Golf is complimentary.

### Hotel Reservations:

We have reserved a limited block of rooms at the special Conference rate of **\$255 per night** at Disney's Grand Floridian Resort & Spa, 4401 Grand Floridian Way, Lake Buena Vista, FL, 32830. That rate will be available until **January 30, 2016**. You may make your reservations directly with the hotel after you have registered for the Conference. To make your hotel reservation online, please [click here](#) or call the group reservations number at **(407) 939-4686**.

## REGISTRATION FORM

First \_\_\_\_\_ Last \_\_\_\_\_

Badge Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Email \_\_\_\_\_

**Activities:** Please check the Tuesday, February 23 activity in which you'd like to participate:

Golf Tournament on Disney's Magnolia Course – 8:00 a.m.  Yes  No

Bass Fishing Excursion via Pontoon Boat – 10:00 a.m.  Yes  No

Guided Personal Watercraft (Jet Ski) Tour – 10:00 a.m.  Yes  No

Miniature Golf on Disney's Fairway Course – 10:00 a.m.  Yes  No

Kindly register by January 25, 2016 | Conference attire: Business Casual



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