



Speaker Biographies*

The 14th Annual HJ Sims Late Winter Conference
Financing Methods and Operating Strategies
in the Senior Living Industry for
Non-Profit and Proprietary Senior Living Providers
Hyatt Regency | Austin, TX
Tuesday, February 28 – Thursday, March 2, 2017



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hjsims.com/register

*The speaker bios are shown alphabetically by last name under Session Titles.

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HJ SIMS 2017 CONFERENCE
SPEAKER BIOS

CFO BREAKFAST

Brian Barnes, Chief Financial Officer and Chief Operating Officer, The Legacy Senior Communities

Brian Barnes has over 25 years in audit/finance and executive management. His experience includes managing numerous public and private company audits, private equity financing transactions, and numerous merger/acquisition transactions.

For the past 14 years, Brian has been with The Legacy Senior Communities, a premier provider of senior housing and services. During his tenure, his role has evolved to include responsibility for the oversight and management of all business operations as well as all finance/accounting and human resource functions.

Brian received a Bachelor's Degree in Accounting and graduated with honors from Texas Tech University in 1989 and is a Certified Public Accountant.

George Morris CPA, Senior Vice President and Chief Financial Officer, Benchmark Senior Living

April 2008 – Present, Wellesley, MA

Benchmark Senior Living is an innovator, leader and a "best place to work" in senior living. With 5,500 passionate and compassionate associates, serving 4,700 residents, Benchmark manages, owns and develops primarily assisted living and memory care communities located in New England. The company has \$1.6 billion in assets under management and \$416 million in annual revenue.

George's responsibilities and accomplishments include:

- Member of the senior team, sets the strategic planning & direction of the Company
- Advisor to the CEO, COO and works closely with the Board of Advisors
- Operational CFO – provides direct support to the operations team to maximize profitability
- Responsible for accounting and reporting, IT, portfolio management, cash management, investor relations, compliance and management company
- Moved the Company to public company compliance (Sarbanes-Oxley) in less than 1 year
- Moved the Company to a paperless cash receipts & disbursements environment

He received a BBA in 1994 from St. Bonaventure University, having majored in Finance and Accounting.

Amy Harrison, Chief Financial Officer, The Kendal Corporation

Amy Harrison is Chief Financial Officer of The Kendal Corporation, a leader in the field of aging services, with headquarters in the southeastern Pennsylvania/metro Philadelphia area. Kendal is among the 10 largest not-for-profit senior living organizations in the U.S.

Amy became part of the Kendal family in 2011 as CFO for Collington, a Kendal-affiliated life care community in suburban Washington, D.C. Before joining Collington, she served as the Director of Finance at Columbia Vantage House Corporation, a not-for-profit life care community located in Columbia, Maryland. Prior to that that she served for 12 years as Director of Accounting at Bishop Gray Inns, two faith-based life care communities in Lake Worth, Florida.

Amy is a certified public accountant and experienced finance executive. She holds a master's degree in Business Administration from Nova Southeastern University, Ft. Lauderdale, Florida and a bachelor's degree in Business Administration in Accounting, from Northwood University, West Palm Beach, Florida She also has earned the newest international accounting credential, that of a Chartered Global Management Accountant.

THE LATEST TECHNOLOGICAL ADVANCES FROM THE SOUTH BY SOUTHWEST CONFERENCE

Guest Speaker

Scott Wilcox, Chief Innovation Officer for the South by Southwest Conference & Festivals

Scott Wilcox is currently the Chief Innovation Officer for SXSW LLC (South by Southwest). Scott leads the strategy and business development related to both technology and content and in harnessing value from new ideas. Prior to that, Scott spent 17 years as the CTO for SXSW creating the technical strategy and infrastructure necessary for producing the world renown SXSW Interactive, Music, Film conferences and festivals held every year in March in Austin, TX. Scott leads the company as its innovator in: custom software development, live video production, content licensing, network design, RFID, WiFi, mobile apps and web development.

In 2011, Scott started the SXSW Eco conference, an event for sustainability professionals, which will take place this year in Austin Texas October 10-12. Scott also Co-Founded RightRound LLC in 2012, a technology company which specializes in temporary internet connectivity, high-density WiFi and streaming for conferences, festivals and corporate meetings. In 2014, Scott joined the board of directors of Eventbase Technology Inc, the leading mobile technology platform for premium events.

Scott received a B.A. in Psychology and English from Kenyon College.

FUTURE PRICE AND AVAILABILITY OF ENERGY

Guest Speaker

Fred C. Beach, PhD.

Dr. Beach is the Assistant Director for Energy & Technology Policy at the Energy Institute, The University of Texas at Austin. He is responsible for supervising and conducting research and studies related to the interplay between the development of Energy Policy, Environmental Policy, and Technology Policy. Dr. Beach also teaches several graduate-level courses in the Cockrell School of Engineering and McCombs School of Business.

Prior to joining The University of Texas at Austin, Dr. Beach served for twenty-five years in the United States Navy, where he was a qualified Submariner, Naval Aviator, Surface Warfare Officer, and Acquisition Professional. Since retiring in 2003 he has also served as a consultant on defense-related topics for the U.S. Chief of Naval Operations Strategic Studies Group, MITRE, Naval Research Advisory Committee, Naval Research Laboratory, Defense Advanced Research Projects Agency, and the Defense Science Board.

Dr. Beach holds a Ph.D. from the LBJ School of Public Policy, University of Texas at Austin, an M.S. in Physics from the Naval Postgraduate School, and a B.S. in Chemistry with a minor in Nuclear Engineering from the University of Oklahoma. He is also a graduate of the Defense Acquisition University and Certified Level III DoD Acquisition Professional and Program Manager.

LATEST DESIGN CONCEPTS FOR THE NEXT GENERATION

David Dillard FAIA, Principal D2 Architecture

D2 Architecture, headquartered in Dallas, Texas, focuses exclusively on senior living projects and designs nationally recognized communities across the United States. The organization is led by President David Dillard, FAIA, who celebrates two decades of specialization in senior housing and is a regular speaker at Senior Living conferences around the country. In nearly twenty years D2 has developed a remarkable portfolio of successful projects, a national reputation for research such as The Sleepover Project and public presentations on such topics as Culture Change, Integrated Communities, Code Compliance, and other How Tos of senior living design, and a limitless passion to make tomorrows environments for seniors better and better.

David's contribution to senior living architecture started in Dallas in the 1990's and accelerated greatly when he designed Edgemere in 1998. Since then he has designed one award-winning community after another. Although he is often on the dais of national and regional conventions (Leading Age, AIA, ULI, APA, Environments for Aging, et al) he has taken a life-long vow never to leave the drawing board.

J. David Hogleund FAIA, Principal, Perkins Eastman

An international leader in senior care design, David Hogleund brings extensive knowledge and skills in programming, planning, and design for aging adults. He is a frequent contributor to industry publications and presents on issues of changing demographics, facility repositioning, Culture Change and trends impacting design of continuing care retirement communities, residential and assisted living, short-term rehabilitation, long-term and memory care environments. David is the author of *Housing for the Elderly: Privacy and Independence in Environments for the Aging* and co-author of *Building Type Basics for Senior Living Design* (2013 second edition). He taught a course on planning and design for a new generations of seniors at Harvard’s Graduate School of Design (15 years) and currently teaches this program at the University of Southern California.

David received his Bachelor of Science in Architecture from Rensselaer Polytechnic Institute and a Master of Architecture degree from the University of Illinois at Urbana-Champaign. During his graduate studies, he received a National Endowment for the Arts grant and a university fellowship in order to visit group homes in Scandinavia and England—an instrumental source of his approach to senior living design.

Greg Huntzman, AIA, President, Pi Architects

Greg Huntzman has been involved in medical and senior living projects since his graduation from the University of Texas. His passion for care has led him to the forefront in developing creative and compassionate environments for seniors while supporting and fine tuning efficient operations for owners. Greg is the president of Pi Architects, which focuses on the integration of architectural, landscape, and interior spaces designed specifically for our elders.

Education and Certification:

- Bachelor of Architecture - The University of Texas at Austin, 1992
- Certified Assisted Living Manager - Southwest Texas State University

Affiliations and Registrations:

- Member National Council of Architectural Registration Boards
- Member American Institute of Architects
- Pivot Senior Living Specialists, founding member
- Texas Assisted Living Association (TALA) Public Policy Committee Member
- Texas Association of Homes and Service for the Aging (TAHSA) Housing Committee member
- Texas Culture Change Coalition (TxCCC) founding member

Michael J. Martin, AIA, Managing Partner of RLPS Architects.

Mike possesses more than 25 years of experience providing project leadership for retirement community campuses and new life plan communities. Based upon a thorough understanding of the complexities associated with operating and updating a successful senior living community, Mike orchestrates the planning and design process and facilitates client and consultant communications. His project experience has

provided a thorough knowledge of land use, development, future planning and technology initiatives. Mike has served as a speaker at regional, state and national conferences including LeadingAge and many of its state affiliates.

An NCARB registered architect with current registration in more than a dozen states in the U.S., Mike earned a Bachelor's of Architecture Degree from Temple University in 1986.

THE EXPANSION OF SENIOR SERVICES TO MULTI-FAMILY HOUSING

Nichole Doye Battle, Chief Executive Officer, GEDCO (Govans Ecumenical Development Corporation)

GEDCO was started by a dedicated group of seven pastors from different denominations and parishes in the northern Baltimore City neighborhood called Govans as a means of answering a strong community need for affordable, supportive living facilities for elderly congregants with low incomes. Today, this group has grown to include 56 different organizations. GEDCO began as "Govans Ecumenical Homes" in 1984. As the organization continued to expand its efforts and projects as a growing nonprofit that provided affordable housing, it became a development corporation in 1991. These changes were made in order to broaden the base of community involvement and to expedite the development of new projects. GEDCO is now an independent, interfaith, 501(c)(3) tax-exempt non-profit organization.

Michael Comparato, Chairman, Chief Executive Officer, Vieste, LLC

Michael Comparato is responsible for turn-key project delivery and construction program management of National Standards Public/Private projects and serves as President and CEO of Vieste, LLC a public/private partnership services company located in Chicago, Illinois. Vieste has opened a rental independent, assisted and memory care community near Orlando, Florida and closely associated with Solvita, an active adult community.

Mike has served as owners' representative/program manager for both public and private sector clients on capital projects with an aggregate value exceeding \$5 billion. He also has extensive experience in corporate mergers, acquisitions and asset management.

Mike received a B.S. in Management, Finance and Marketing from Purdue University.

John Mehrkens, Vice President of Project Development, Senior Housing Partners

John has served in the senior housing and service industry since 1987 and has held positions in management, operations, research, finance and development. John is the Vice President of Senior Housing Partners, the development arm of Presbyterian Homes and Services, where he oversees the project development and consulting services of the organization. John has been a part of the development group since its inception in 1997 and has led the Senior Housing Partners group since 2004. SHP has developed a full

range of older adult product types including independent living, assisted living, memory care, and skill nursing care, representing over 6000 units and \$1.25 billion dollars of development value. Senior Housing Partners provides comprehensive development consulting services including architectural program design, municipal entitlement, project financing, construction owner's representation, and transition to management.

John received a BS degree in Economics from the University of Minnesota.

William Pettit, Jr., President and Chief Operating Officer - R.D. Merrill Co.

Bill Pettit is the President and Chief Operating Officer of the R. D. Merrill Co. with responsibility for Merrill Gardens and sister company Pillar Properties. Bill joined Merrill Gardens in 1992 after 18 years in the banking industry. He was instrumental in the formation of the company, starting with one community in 1993. He directed the rapid growth and timely execution of acquisitions, and developed the policies that speak to the Merrill Gardens commitment to quality.

Under Bill's leadership, the Better Business Bureau named Merrill Gardens the Business of the Year in 2004 for the company's commitment to residents, team members and community service. The Family Business Institute named Merrill Gardens the Washington State Family Business of the Year three times. The company was chosen based on innovative business strategies, company performance, and contributions to the community. Merrill Gardens has also received a Finalist Award in the American Business Awards in the Innovative Business Practices category.

Bill is the past chairman of the Executive Board of the American Seniors Housing Association. He received a Bachelor's degree from Princeton and a M.B.A. from the University of Oregon.

Frank Rockwood, Co-Founder and President, Rockwood Pacific

Frank and Susan Rockwood founded Rockwood Pacific in 2013. Frank is responsible for overseeing development advisory and program management client engagements, and Susan is responsible for company administrative matters and analytical support.

Frank combines his passion for building better communities with decades of real estate strategy, finance and development experience. Frank has served as a development executive with Sunrise Senior Living, Transamerica Senior Living, Disney Development Company, the City and County of Denver, and one of the most prominent developers of residential high-rises in New York City. In the realm of real estate strategy, Frank has advised several prominent organizations on major strategic issues including Transamerica Corporation, the JEDC (economic development agency), Gables Residential (major apartment owner/developer) and the St. Joe Company (major land developer). He also worked in conjunction with BAE Urban Economics, the federal government, and various local governments on real estate strategy and execution

consulting assignments. Frank has served as a finance executive with Transamerica Realty Services (spearheading their affordable housing investment program).

Frank graduated cum laude from Harvard College with an A.B. in Applied Mathematics (Harvard Scholar) and from Berkeley-Haas with a Master of Business Administration (Appraisal Institute Scholar).

FINDING AND MOTIVATING EMPLOYEES

Andrew Carle, Chief Operating Officer, Affinity Living Group

Affinity Living Group is a national senior housing provider with more than 100 communities in operation or development, totaling 6,500+ beds and 4,200+ employees in 9 States.

Andrew has 30+ years of executive level senior housing and healthcare experience, including prior experience as Senior Housing VP, and CEO, COO, and Director of Planning and Marketing for hospitals and vertically integrated healthcare systems.

Additionally, he has served as Executive-in-Residence, Assistant Professor, and Founding Director, Program in Senior Housing Administration at George Mason University, Fairfax, Virginia.

Daniel Reingold, President and Chief Executive Officer, Riverspring Health™

Daniel Reingold is an award-winning, nationally recognized leader and visionary in the field of aging. As President and CEO of RiverSpring Health, he has led breakthrough efforts to create revolutionary programs in elder care, has won numerous honors and has spoken about innovations in and quality of healthcare for the elderly at major conferences throughout the world.

RiverSpring Health, led by Dan since 1990, is a leading non-profit senior care organization with a century of history and leadership, which includes the operation of the renowned Hebrew Home at Riverdale. As a passionate advocate for older adults, Dan and his team opened the Weinberg Center for Elder Abuse Prevention, the nation's first elder abuse shelter, in 2005.

Dan is on the Board of the Greater New York Hospital Association (GNYHA), the Association of Jewish Aging Services (AJAS) and the Continuing Care Leadership Coalition (CCLC), in which he was a past chairman. He serves on the boards of directors of the Continuing Care Leadership Coalition, the Greater New York Hospital Association and the Association of Jewish Aging Services.

Dan received a B.A. from Hobart College, an M.S. from Columbia University, and a law degree from the Benjamin N. Cardozo School of Law of Yeshiva University.

Robert Syron, CEO/President, Peconic Landing

Robert Syron is President and CEO of Peconic Landing, a not-for-profit life plan community on the east end of Long Island, where he has been since 2003. He has worked in the senior services sector for more than 27 years, serving as Administrator for multiple skilled nursing care centers and as Executive Director of a life plan community before working as a consultant in the industry.

Under his leadership, Peconic Landing has been named one of *U.S. News and World Report's* "Best Nursing Homes" for six consecutive years, the first New York State life plan community to obtain a CARF-CCAC Person Centered Care certification, and an award-winning establishment for innovation and best practices. In 2012, the organization was rated one of the Top 10 "Best Companies" to work for in New York State by the State Society for Human Resource Management. Leading Age awarded Peconic Landing the Work Place Distinction Award in 2014. Bob is also the recipient of the James W. Sanderson Memorial Award for Outstanding Leadership by LeadingAge NY, and in 2016 he received the Corporate Citizenship Award for Leadership Excellence for a Non-Profit from *Long Island Business News*.

Bob holds a B.S. in Health Science and a Masters in Public Administration from SUNY Brockport. A licensed Nursing Home Administrator in New York, he is also a professionally Certified Nursing Home Administrator from the American College of Health Care Administrators (ACHA) and Certified Aging Services Professional (CAS) from the Coalition for Leadership in Aging Services. Bob serves on the LeadingAge New York Services Board.

TURNAROUND SUCCESSES

Denise deFiebre, Vice President, Acquisitions, Senior Care Development

In her role as Senior Care Development's acquisition point person, Denise defines success as the intersection of vision, people, financial resources, and opportunity. Denise was a principal at Retirement Living Services, a Connecticut-based company that provided a full range of services to sponsors of senior housing communities. Prior to that, she was a financial and analytical consultant to Public Financial Management, Inc. on behalf of its tax-exempt clients, and worked in the investment banking group of Kidder, Peabody & Co.

A strong advocate for the disadvantaged, Denise serves on the board of Our Piece of the Pie, an agency that provides a wide range of support services to the youth of Hartford, Connecticut.

Denise holds a BA in Public Policy from Hamilton College, where she graduated Magna Cum Laude and Phi Beta Kappa, and a Master's degree in Public and Private Management from Yale University's School of Management with a concentration in Finance.

Lynne Katzmann, Founder and President, Juniper Communities

Lynne Katzmann is Founder and President of Juniper Communities, which invests in, develops and manages senior living and long term care communities. With 18 properties in four states and more than 1200 employees, Juniper, has \$65 million in revenues. Celebrating its 25th Anniversary, Juniper is ranked #14 by Crain's New York on its Top 50 ranking of woman-owned companies for the New York tri-state area.

Juniper is the only woman-founded, owned and led business among the top 40 national assisted living companies. Lynne launched the business when she was 32, with six years' experience in the health care industry and a PhD in economics. An active leader in the social entrepreneurship movement at its beginning, she was a firm believer in the so-called double bottom line: doing well by doing good.

Lynne leads an organization known for resident-centered, personalized care. Juniper's priorities and its many award-winning innovations are consistent with her belief: "Aging and its challenges are a natural part of our life cycle. Quality of life in this third stage should be enjoyed to its fullest according to each person's choosing. There is no reason that a frail body should not allow a life of joy and meaning."

Lynne has been involved in the health care industry for almost 30 years, working in the public and private sectors in the United States and Europe. She serves as a board member of several for-profit and non-profit organizations including Senior Care Centers of Dallas, ElderCare Alliance of San Francisco, ArtsConnection of New York City and the Social Venture Network.

Christopher Keysor, President and Chief Executive Officer, Lenbrook

Chris Keysor first joined Lenbrook in 2009 to serve as its Interim Chief Financial Officer. That same year Lenbrook completed its \$160 million renovation and expansion, opening 140 new residential living apartment homes. Chris became President and Chief Executive Officer of Lenbrook in January, 2014

Chris is a seasoned senior living executive, having served in the healthcare and senior living industry for 25 years—first as a certified public accountant and then in executive capacities as a provider, developer and investment banker.

He began his career as a CPA in the healthcare and life sciences practices of KPMG Peat Marwick, progressing on to become a partner at BDO Seidman in Atlanta, and later became the national principal-in-charge of the senior living practice for LarsonAllen, the largest national accounting firm specializing in the senior living sector.

On the provider side, Chris was vice president of business development for CareLink Management Inc., a post-acute care subsidiary of a 1,500-bed hospital system, during its expansion into senior living campuses and nursing facilities. During his tenure as a

managing director with BB&T Capital Markets healthcare group, he led healthcare providers through tax-exempt financings of major projects.

Chris earned his B.S. in Accounting from the University of Florida and was a certified public accountant in Florida.

Kenneth L. Young, Executive Vice President Planning/Development & General Counsel, United Church Homes

Kenneth Young joined United Church Homes, Inc. (“UCH”) in 2005 and is responsible for the oversight of UCH’s and its subsidiary entities’ legal, insurance and compliance matters. Additionally, he is the lead executive to evaluate and manage prospective new acquisition, affiliation and partnership opportunities in concert with UCH’s strategic development plan. Prior to joining UCH, Ken was a partner with the law firm of Roth Bacon Young, Attorneys, where he served as retained corporate counsel for UCH from 1993 – 2005.

Ken earned his Bachelor of Arts degree in Economics from Ohio Wesleyan University in 1987 and his Juris Doctor degree from The Ohio State University College of Law in 1993. He is a Fellow of the Leading Age Leadership Academy and is a member of the Leading Age Core Legal Committee, the American Health Lawyers Association, the Association of Corporate Counsel, and the Ohio State Bar Association. Ken also serves as a member of the Board of Directors of The First Citizens National Bank in Upper Sandusky, Ohio and as a member of the Board of Trustees of Marion Technical College, Marion, Ohio.

MARKETING TO A CHANGING POPULATION

Liz Bush, Senior Vice President/Director of Senior Housing Marketing and Sales, LCS

Liz Bush serves as Senior Vice President/Director of Senior Housing Marketing and Sales for LCS® serving both *Life Care Services™* and *LCS Development™*.

In this role, Liz oversees the company’s marketing and sales programs, market research, marketing and sales systems, advertising, and all other activities that drive occupancy. She identifies the information, tools, strategies, and skills necessary to positively impact occupancy and census. Liz’s expertise lies in developing authentic and differentiated brand positioning, developing effective and motivated staffs, and executing strategies that address both internal and external opportunities.

Liz is also an advocate for senior living innovations that strengthen the consumer value proposition, such as the Lifestyle and Health Services wellness program and *Life Care Services* resident portal initiative.

Liz earned a Bachelor’s degree in Business and Music from the University of Evansville.

Patrick Fannon, Vice President of Sales and Marketing, Liberty Lutheran

Patrick Fannon is an accomplished, results-driven, enthusiastic management professional dedicated to exceeding performance goals, providing distinguished customer-focused service, while managing a large and varied senior living portfolio with the proven ability to establish, build, and maintain strong relationships while growing revenue and occupancy.

Prior to joining Liberty Lutheran, Patrick was Senior District Director of Sales for the Pennsylvania and New Jersey area for Brookdale and was responsible for 17 communities and over 1,380 units of assisted living, memory care and independent living services. Before that he was with Emeritus.

He received a Bachelor of Arts degree in History and Education in 1998 from Drew University and a Master of Arts in American Studies in 2000 from Trinity College – Hartford.

David A. Smith, Founder and CEO, One on One, Service to Seniors and One on One Sherpa

David Smith is co-owner, developer and manager of over 1,000 senior housing units including The Gatesworth at One McKnight Place Campus and Parc Provence Memory Care, both located in St. Louis and nationally recognized for innovation and quality services. He is also a co-owner of Quail Ridge Senior Living in Oklahoma, Mallard Cove Senior Living in Ohio and The Colonnade Senior Living in Illinois.

He is Founder and CEO of One On One, Service to Seniors and One On One Sherpa. One On One provides marketing and sales assessments, training, coaching and creative services to senior housing communities across the U.S. and Canada.

David was the Lead Instructor for the Sales and Marketing Curriculum at Erickson School Executive MBA Program at the University of Maryland and is a regular featured speaker at national senior housing conference presentations, including NIC, ASHA, ALFA and the annual Senior Housing Sales and Marketing Summit.

He is also a licensed real estate broker and a member of the Missouri Bar. He graduated Phi Beta Kappa from Lake Forest College and is also a graduate of the Washington University of Law.

J. Craig Statton, President and CEO, Atherton Baptist Homes

Rev. Craig Statton began his tenure at Atherton as the Director of Planned Giving in 2012. In January 2014, he was appointed Director of Operations, and in August 2014 he became the President and CEO. Since 2014, Craig has led a remarkable turnaround in the community, including superbly effective marketing to Atherton's changed neighborhood. Prior to joining Atherton, Craig worked for 28 years as a Christina

minister with the final 16 years as senior pastor of a multiple-staff church in Selma, California.

He graduated from the University of Colorado (B.M. Ed.) and Oral Roberts University Seminary (M. Div.) and completed a Graduate Certificate in Long-Term Care from the University of South Dakota in 2014.

LET'S HEAR FROM THE LEADERS: SETTING THEMSELVES APART

David Barnes, President, Watermark Retirement Communities.

Watermark Retirement Communities is one of the largest senior housing operators in the country. The Tucson, Arizona-based company has implemented a management approach that drives success by actively disrupting the status quo.

An operator with 38 communities in 22 states, Watermark first adopted the Leadership by Design approach decades ago. In an industry where it's common to hear that resident satisfaction and safety drives strategy and operations, the Watermark philosophy puts the company's employees, or associates, at the center.

"That's the core of it," says David "If you take good care of your associates, they will take good care of your residents, which will fill your buildings and take care of your investors."

David's career began with Fountains Retirement Communities in 1988 when he served as an operational trouble-shooter. He traveled to communities across the United States, typically living at the communities and working with the Executive Directors to implement policies, procedures and systems. In October of 2006, Fountains Retirement Communities of Arizona changed its name to Watermark Retirement Communities.

David serves on the Executive Board of the American Seniors Housing Association. He received his BS degree from California State University, majoring in computer science and mathematics

Nick Harshfield, Chief Financial Officer, Ascension Senior Living

Nick Harshfield's career includes over 25 years of corporate finance and accounting in an array of industries, including publicly traded and privately held profit and non-profit companies. He has worked in financial roles within the airline and manufacturing industries and spent over 13 years in health and human services companies. Nick is responsible for the oversight of all aspects of financial functions and information services of Ascension Senior Living. He has extensive experience in negotiating and obtaining financing for mergers and acquisitions as well as construction projects. He has also had experience in the implementation of several major information technology systems.

He received his Bachelor of Business Administration (BBA) from the University of Louisville in 1993.

Adriene Iverson, President and Chief Executive Officer, Elder Care Alliance

Elder Care Alliance (ECA) is a non-profit provider of care services for older adults, based in Alameda, California. It currently owns and operates four senior housing communities within California, including independent living, assisted living, skilled nursing and specialized dementia care.

Adriene Iverson joined Elder Care Alliance (ECA) in 2010 as VP of Operations and then served as Vice President of Strategy and Business Development beginning in March of 2014 before being named President and CEO in April of 2015. In her initial leadership role, Adriene had primary oversight for all of the organization's operational functions. In 2011, she led a comprehensive software conversion and implementation of electronic health records. She was also instrumental in ushering in Dr. John Zeisel's internationally recognized dementia care program I'm Still Here™ in ECA's memory care neighborhoods.

She then led the organization's comprehensive strategic planning process which resulted in the adoption of ECA's Strategic Framework. In her strategy and business development role, Adriene's key focus was on ECA's two macro-strategies of Focused Growth and Diversification of Service Mix and Research, Creation, Innovation. That work continues in her role as President & CEO along with ECA's third macro-strategy of establishing ECA as an Employer of Choice.

Adriene has extensive experience guiding the operations of not-for-profit organizations. Prior to joining Elder Care Alliance, she served for fifteen years as Vice President at the CNH District Church Extension Fund, a \$60 million church loan fund. Her responsibilities ranged from oversight of finance to marketing, underwriting, loan placement, and construction draw management. For more than a decade she has served as chair of the board for a startup Life Plan Community.

Adriene holds a Bachelor of Science in Marketing from Santa Clara University.

Jesse Jantzen, President and Chief Executive Officer, Ascension Health Senior Care

Jesse Jantzen has served as President and CEO of Ascension Health Senior Care since 2014. Ascension Health Senior Care is part of Ascension Health, the healthcare delivery subsidiary of Ascension.

Jesse is a highly regarded and respected leader in senior care who brings unique and distinguishing characteristics to faith-based leadership. Shaped by childhood experiences growing up a missionary child in the jungle of Colombia, South America, he has a passion for people that shows in his work in the field of aging.

He began his work in senior care as a skilled nursing home administrator and has held leadership positions in the senior living field for more than two decades. His career has spanned operations of skilled nursing facilities and life plan communities, development of new entrance fee communities and responsibility for a provider system. Before he

became President and CEO at Ascension, Jesse had been President and CEO of Elder Care Alliance based in Alameda, California, where he was responsible for overall operations, vision, strategy and strategic plan implementation.

Jesse earned an MBA and bachelor's degree at Texas Tech University.

Benjamin Pearce, Founder and CEO, EvoLve Senior Living

Benjamin Pearce is an expert in the senior living industry and dementia related care. He has over three decades of experience working with over 200 communities in 33 states. His book, *Senior Living Communities: Operations Management and Marketing for Assisted Living, Congregate and Continuing Care Retirement Communities*, was first published in 1998; and with a second edition in 2007 by Johns Hopkins University Press, it is now the go to handbook for effective senior residential facilities with almost 60,000 copies in print. In addition, it is being used as *the* textbook in major university geriatric and senior living courses and has also been converted into an online classroom for the certification of assisted living administrators in several states.

Ben shares his expertise as an adjunct professor for Johns Hopkins University and New York University, while teaching a variety of courses about senior living development and operations.

Prior to founding EvoLve, as former Chief Operating Officer for Bloom Senior Living, Ben managed all levels of care from independent living to special care units in 4 eastern states. Ben has also served as East District Vice President of Operations for Holiday Retirement, where he oversaw operations and marketing for 71 independent and assisted living communities. He was also President & CEO of Potomac Homes, Senior Vice President of Senior Housing of Genesis Health Ventures and Vice President of Operations for Classic Residence by Hyatt. He has over his career opened and taken 75 newly developed senior living communities from construction to stabilized occupancy.

PREDICTING U.S. INTEREST RATES AND THE S&P 500

Guest Speaker

Ehud I. Ronn, PhD

Ehud I. Ronn is a professor of Finance at the McCombs School of Business, University of Texas at Austin. He has published articles on investments, interest rate instruments and energy derivatives in the academic and practitioner literature. Prior to joining the University of Texas in July 1988, Dr. Ronn was a faculty member at the University of California, Berkeley, and the University of Chicago. During 1991 – '93, Dr. Ronn served as Vice President, Trading Research Group at Merrill Lynch & Co. Dr. Ronn served as the founding director of the University of Texas Center for Energy Finance from 1997 – 2009. From Jan. 2010 to Feb. 2011, Prof. Ronn was Commodity Market Modeling Practice Area Manager at Morgan Stanley & Co. In Nov. 2004, Dr. Ronn was selected by Energy Risk to the "Energy Risk Hall of Fame."

Dr. Ronn received his Ph.D. from Stanford University.