



HJ Sims 2016 Conference Schedule

Tuesday, February 23

GOLF TOURNAMENT ON DISNEY'S MAGNOLIA GOLF COURSE

- 6:45am** Motor coach transportation from Grand Floridian Convention Center Porte Cochere
7:15am Check-in and Breakfast Buffet
8:00am Shotgun Start
Return to Grand Floridian by motor coach at conclusion of tournament

PERSONAL WATERCRAFT (JET SKI) TOURS

- 7:15am** Motorcoach transportation to from Grand Floridian Convention Center Porte Cochere to Disney's Contemporary Resort Marina T-Dock for Group 1 for **8:00am—9:00am tour**
8:15am Motorcoach transportation for Group 2 for **9:00am—10:00am tour**
9:15am Motorcoach transportation for Group 3 for **10:00am—11:00am tour**

MINIATURE GOLF

- 9:15am** Motor coach transportation from Grand Floridian Convention Center Porte Cochere
10:00am—12:00pm Miniature Golf on Fantasia Gardens Miniature Golf Course
Return to Grand Floridian by motor coach

BASS FISHING

- 9:30am** Check in at Captain's Shipyard Marina at Disney's Grand Floridian
10:00am—12:00pm Bass Fishing Excursion on Pontoon Boats

4:30pm

NETWORKING—Free time to network on your own. The WHITEHALL ROOM & PATIO is a perfect place to catch up with colleagues and meet new people

OPENING NIGHT RECEPTION AND DINNER AT GRAND FLORIDIAN

- 7:00pm** Reception at SUMMERHOUSE PATIO & SAND BEACH
8:00pm Dinner in Grand Floridian SALONS 6-9

Wednesday, February 24

7:30am—8:30am

Moderator:
James Rester,
Sr. Vice President,
HJ Sims

FOR CFOs and FINANCIAL EXECUTIVES – WHITEHALL ROOM

A SPECIAL NETWORKING BREAKFAST.

Both non-Profit and Proprietary CFOs and Financial Executives are invited to meet each other to discuss topics of interest.

Tanya Hahn, Senior Vice President/CFO, National Church Residences

Jeffrey Hongslo, Chief Financial Officer, American Baptist Homes of the Midwest

Steve Kearney, Chief Financial Officer, Presbyterian Communities and Services, Dallas, TX

7:30am—8:30am

BREAKFAST AND NETWORKING—SALONS 4-6 LOBBY & SALON 6

8:40am—8:50am

WELCOME AND INTRODUCTION—SALONS 4 & 5

William Sims, Managing Principal, HJ Sims

8:50am—10:00am

GENERAL SESSION—SALONS 4 & 5

THE SENIOR LIVING INDUSTRY AND CAPITAL MARKETS TODAY AND 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.

William Sims, Managing Principal, HJ Sims

R. Jeffrey Sands, Managing Principal / General Counsel, HJ Sims

Aaron Rulnick, Managing Principal, HJ Sims

Anthony Luzzi, President, Sims Mortgage Funding

10:00am—10:30am

NETWORKING BREAK

10:30am—11:45am

BREAKOUT SESSIONS

I.

THE NEW WORLD OF SKILLED NURSING. SALONS 4 & 5

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.

Isaac Dole, Founder/Managing Principal, Birchwood Health Care Properties

Carol Irvine, President and CEO, Abramson Center for Jewish Life

John Snader, President and CEO, Brethren Village

Grant Tribble, Executive Vice President and Chief Financial Officer, Good Samaritan Society

II.

OVERLOOKED MARKETS FOR NEW DEVELOPMENT. ST. AUGUSTINE HALL

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. Successful operators will describe how they choose the right markets for their new products.

Debra Lockwood, President and Chief Financial Officer, Provident Resources Group

Keith Seeloff, Partner, Dixon Hughes Goodman

Michael Starke, Managing Director, PMD Advisory Services

Charles Trefzger, President and Chief Executive Officer, Meridian Senior Living

11:45 am—1:00 pm

LUNCH AND NETWORKING—SALONS 6-9

Wednesday, February 24

1:00pm—2:30pm

GENERAL SESSION—SALONS 4 & 5

Introduction:
Kerry Moynihan,
Director of
Organizational
Development,

DISNEY'S APPROACH TO SELECTION, TRAINING AND ENGAGEMENT OF EMPLOYEES.
GUEST SPEAKER: MARK MATHEIS, Facilitator, Disney Institute

Mark Matheis' presentation will include how to create and sustain a strong culture that fosters employee loyalty and engagement; how to engage the hearts of employees and create a culture of commitment; how communication is the loudest signal of culture that an organization can send; how to select employees; and how Disney develops its people.

2:30pm—3:00pm

NETWORKING BREAK

3:00pm—4:00pm

BREAKOUT SESSIONS

I.

INNOVATIVE MEMORY CARE PROGRAMS AND SERVICES. SALONS 4 & 5

Moderator:
Andrew Nesi,
Executive Vice
President, HJ Sims

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.

Matthew Anderson, Chief Executive Officer, The Osborn

Sherry Daughtery, Consultant

Carissa Suggs, Certified Teepa Snow Trainer, Director of Health Services, Savannah Commons

II.

STRATEGIES AND INNOVATION TO THRIVE UNDER HEALTH CARE REFORM. ST. AUGUSTINE HALL

Moderator:
James Bodine,
Executive Vice
President, HJ Sims

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.

Warren Cole, Co-Chief Executive Officer, Post Acute Partners

Michael McRae, President and CEO, St Ann's Community

Robert Rundle, President/CEO, SpiriTrust Lutheran

4:00pm—4:15pm

NETWORKING BREAK

4:15pm—5:15pm

GENERAL SESSION—SALONS 4 & 5

Introduction:
William Sims,
Managing
Principal, HJ Sims

INVESTMENT STRATEGIES FOR INDIVIDUALS AND ORGANIZATIONS.

GUEST SPEAKER: LEO P. GROHOWSKI, EVP, Chief Investment Officer, BNY Mellon Wealth Management

Leo Grohowski 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.

5:15pm—5:45pm

INFORMAL DISCUSSION ON INVESTMENT STRATEGIES. WHITEHALL ROOM & PATIO

SPECIAL EVENING EVENT AT EPCOT

5:45pm

TRANSPORTATION: Motorcoaches will leave from Grand Floridian Convention Center Porte Cochere. Return transportation will be provided following the event.

6:15pm—7:00pm

RECEPTION on the Italy Isola Terrace at the Pavilion at Epcot

7:00pm—8:30pm

DINNER in the American Adventure Rotunda at the American Pavilion at Epcot

8:30pm—9:30pm

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.

Thursday, February 25

7:00am—8:00am **BREAKFAST AND NETWORKING—SALONS 4-6 LOBBY & SALON 6**

8:00am—9:00am **GENERAL SESSION—SALONS 4 & 5**

Introduction:
Mark Landreville,
Executive Vice
President, HJ Sims

CYBER SECURITY FOR YOUR ORGANIZATION.

GUEST SPEAKER: RANDALL ROMES, Principal, CliftonLarsonAllen

Randall Romes is a Principal in the information security services and financial institutions groups at CliftonLarsonAllen LLP (CLA) and leads a team of technology and industry specialists who provide IT audits and security assessments for clients in a wide range of industries. 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 pretext phone calls and e-mail attacks. He will also provide specific examples of how to counter cyber attacks plus 10 keys to mitigate risk.

9:00am—10:15am **GENERAL SESSION—SALONS 4 & 5**

Moderator:
R. Jeffrey Sands,
Managing Principal
General Counsel,

LET’S HEAR FROM THE LEADERS: SETTING THEMSELVES APART.

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

David Gehm, President and Chief Executive Officer, Wellspring Lutheran Services

Joel Nelson, President and Chief Operating Officer, LCS

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

Roger Stevens, Chief Executive Officer, Westminster Communities of Florida

10:15am—10:45am **NETWORKING BREAK**

10:45am—12:00pm **GENERAL SESSION—SALONS 4 & 5**

Moderator:
Aaron Rulnick,
Managing Principal
HJ Sims

DEVELOPING, DESIGNING, OPERATING AND FINANCING MODERATELY PRICED RENTAL AND 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 the experts on how to create an efficient, value-oriented, high quality experience in a new senior living community.

Eric Anderson, Vice President of Development, Ryan Companies US

Ward Isaacson, President, Pope Architects

Anthony Luzzi, President, Sims Mortgage Funding

Wayne Olson, Senior Vice President, Volunteers of America National Services

Aaron Rulnick, Managing Principal, HJ Sims

12:00pm **LUNCH AND CONCLUSION OF CONFERENCE SESSIONS**
Box Lunches will be provided outside the meeting room.



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