

LATE WINTER CONFERENCE



Speaker Biographies

HJ Sims

Presents the 15th Annual Late Winter Conference:
Financing Methods and Operating Strategies
in the Senior Living Industry for
Non-Profit and Proprietary Senior Living Providers
Omni Orlando at ChampionsGate | **Orlando, FL**
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INSIDE SPORTS WITH MEL LOWELL

Mel Lowell, Chief Operating Officer, Jewish Federation of South Palm Beach County

Before entering the senior living industry, Mel served as Vice President of Finance and Business Affairs for Madison Square Garden, the New York Knickerbockers, the New York Rangers and Madison Square Garden Boxing. After leaving the Garden, Mel was an owner of a start-up National Hockey League franchise, the Tampa Bay Lightning, where he served as Executive Vice President and Treasurer.

Today, Mel is the Chief Operating Officer of the Jewish Federation of South Palm Beach County and was the lead professional for the Organization's development of Sinai Residences, a Life Plan Community in Boca Raton, Florida.

Mel received his BBA degree in Accounting and Finance from Pace University's Lubin School of Business.

CFO BREAKFAST

Devin Anderson, Vice President, Greenbrier Development

Devin Anderson is responsible for project evaluations as well as for the coordination of the financial activities for acquisitions, new developments, and turnaround opportunities. He also oversees the accounting department that provides accounting services for Greenbrier managed communities.

Prior to joining Greenbrier Senior Living, Devin was First Vice President in the planning and finance department of Greenbrier Development. He previously worked for Ernst & Young where he provided financial services for clients.

Devin received a Bachelor's degree in Accounting from Brigham Young University and graduated Summa Cum Laude with a Master's degree in Real Estate from the University of Texas at Arlington. In addition, Mr. Anderson received a graduate certificate in Property Repositioning and Turnaround Strategies from the University of Texas at Arlington.

Matthew Lux, Chief Financial Officer, Lee Healthcare Resources

Matthew Lux joined Lee Healthcare Resources in 2016. As Chief Financial Officer, he is responsible for the strategic financial planning and supervision of all financial and accounting aspects of Lee Healthcare Resources ("LHR") and its wholly-owned management company Lee FP, Inc. ("LFP"), as well as the effective management of the contracted services provided to affiliated companies. Matt participates in the real estate development activities of LHR's associated companies, including the supervision of financial feasibility studies for proposed projects. He is a strong engagement team leader committed to the delivery of superior client service through a hands-on approach to the development process.

Matt received his BBA in Accounting magna cum laude from Georgia State University, J. Mack Robinson College of Business.

Bryan Starnes, Chief Financial Officer, Affinity Living Group

Bryan Starnes, CPA is Chief Financial Officer for Affinity Living Group. He oversees Affinity's day-to-day accounting and treasury functions as well as financial and tax planning, capital and budgeting processes, trend analysis and forecasting and strategic planning. Bryan has nearly 30 years of accounting and healthcare experience. He joined Affinity's predecessor company, Meridian Senior Living, in 2012. Previously, Bryan was a founding partner of the national accounting firm Martin, Starnes and Associates CPAs, P.A.

Bryan is an accomplished speaker and has spoken on numerous occasions for the Government Finance Officers Association, NC Association of CPAs, Association of Government Accountants, University of North Carolina at Chapel Hill, and UNC Charlotte. He is a guest lecturer at the Institute of Government in Chapel Hill.

REINVENTING THE RELATIONSHIP BETWEEN ACUTE CARE HOSPITALS AND SENIOR LIVING COMMUNITIES

GUEST SPEAKER

Brendan Carr, MD, MA, MS, Professor and Vice Chair in the Department of Emergency Medicine and Associate Dean in the Sidney Kimmel Medical College at Thomas Jefferson University.

Thomas Jefferson University Hospital is a quaternary care hospital located in center city Philadelphia. The Jefferson network includes 13 hospitals, 9 colleges and 4 schools, \$5 billion in annual revenue, 3.6 million patient interactions, and 30,000 employees.

Dr. Carr's career has focused on understanding the relationship between the healthcare delivery systems and patient outcomes. He has authored more than 150 peer-reviewed manuscripts and has applied this expertise by developing innovative programs at Jefferson focused on making healthcare more timely, efficient, and patient centered. He uses academic skills, including intervention design and evaluation blended with administrative skills, to build consensus and shape delivery system transformation.

In addition to his role at Jefferson, Dr. Carr currently serves as the Director of the Emergency Care Coordination Center (ECCC) in the US Department of Health & Human Services. In this role, he works to integrate the emergency care system into the broader healthcare delivery system through interactions with health information technology, quality measurement, consumer transparency, and through the use of financial incentives and novel delivery system solutions.

SENIOR LIVING COMMUNITIES AND DOWNTOWN DEVELOPMENT

Brian Carnaghi, Senior Vice President of Finance and Business Development/CFO/Treasurer, Presbyterian Villages of Michigan

Brian W. Carnaghi, Senior Vice President of Finance and Business Development/CFO/Treasurer, joined Presbyterian Villages of Michigan in 2003. He has over 36 years in the healthcare and long-term care fields, including Ernst & Young, CFO for a healthcare system and a state-wide fraternal organization, CEO for an aging services network, and consultant for a national planning firm.

Brian holds undergraduate and graduate degrees from Western Michigan University, with a Master in Public Administration. He has served on committees and boards of national, regional, and local non-profit and aging service organizations, including the Continuing Care Accreditation Commission Financial Advisory Panel. Brian is an invited speaker on issues of collaboration, innovation, repositioning, strategic development and capital planning.

Edward Nordberg, Jr., Managing Partner and Chief Executive Officer, Wakefield Capital

Edward Nordberg is Managing Partner of Wakefield, which he founded in 2004. He is also a Managing Partner for Hickory Ridge Funds and provides financial and healthcare industry expertise, leveraging more than 20 years of investment experience. Since 2010, he has directed Wakefield's investments in senior housing. From May 2004 through April 2006, Ed directed Wakefield's investment activities on behalf of its partners and CNL Retirement, Inc. Medical Office Properties' medical building portfolio was sold to CNL Retirement, Inc. in April 2004. In 1993, Ed co-founded and served as CFO and Director of HealthCare Financial Partners, Inc.

Prior to 1993, Ed was a practicing attorney with Williams & Connolly in Washington, DC. He is currently a Trustee of Washington College and a Director and Treasurer of the US Lacrosse Foundation. Ed received his B.A. from Washington College, his M.B.A. from Loyola College and his J.D. from Georgetown University Law Center.

Robert Wallace, President/CEO and Executive Director, Canterbury Woods

Robert Wallace has been with the Episcopal Church Home and Affiliates and Canterbury Woods since 2007. Previous to Canterbury Woods, Rob spent three years as Vice President of Health Care Services with RLS, a developer, manager and marketer of continuing care retirement communities. His primary roles at RLS included the development, operations management, and integration of health care services within the CCRC environment.

Rob has been a licensed nursing home administrator in New York State for twenty-two years. He started his career at Monroe Community Hospital in Rochester, New York. He has worked for the University of Rochester's Strong Health System, as well as for Finger Lakes Health in Geneva, New York. His operational experience includes facilities with specialties in ventilator, neuro-behavioral, sub-acute, dementia and medical model adult day care.

Rob holds a Bachelor's Degree in Political Science from the State University of New York at Geneseo and a Master's Degree in Public Administration from the State University of New York at Brockport.

Robert Sumner, President and Founder, Retirement DYNAMICS

Robert Sumner's career in senior services began in commercial loans with First National Bank in Charlotte, NC. He launched his senior services mission in 1983 and continued as the President of Sumner Development, Inc. as a marketing consultant in the development and administration of assisted living facilities, continuing care and life care retirement communities before starting Retirement DYNAMICS® in 2001.

Bobby's signature style incorporates that quintessential motivational mix that promotes peace-of-mind, and peace-of-mind is the ultimate goal for everything Retirement DYNAMICS offers in the retirement business. Bobby believes that successful sales require a unique blend of confidence and "soul," and his soul-crafted sales strategy leaves an indelible mark on communities throughout the country.

He is a graduate of the College of Charleston with a BS in Business Administration and received his MBA from the University of South Carolina. He has been licensed as an Assisted Living Administrator in the State of North Carolina and also has his real estate license.

SKILLED NURSING TODAY AND IN THE FUTURE

William Jones, President, Berkshire Healthcare Systems

William Jones is the President of Berkshire Healthcare Systems ("Berkshire"), a not-for-profit company providing rehabilitation, skilled nursing, long-term care, hospice and residential services to communities throughout Massachusetts, with additional sites in Pittsburgh, Pennsylvania and Dayton, Ohio. As the largest not-for-profit long-term care organization in Massachusetts, Berkshire owns and operates 17 skilled nursing and rehabilitation facilities with over 2,300 beds, hospice services, a continuing care retirement community and assisted living facility.

Bill joined the firm as Chief Financial Officer and was most recently Executive Vice President prior to his position as President. He is the senior executive for the organization, responsible for oversight of all aspects of the company, including its successful diversification into assisted living and hospice. Prior to joining Berkshire, Bill was an audit manager with Heffler & Company, a Certified Public Accounting Firm located in Philadelphia, Pennsylvania, where his responsibilities included leading audit engagements and consulting services for a broad based healthcare clientele.

Bill holds a Bachelor of Science in Accounting from LaSalle University, granted in 1984 and an MBA from the University of Massachusetts at Amherst, granted in 1999. He serves on a number of boards and is the past Chairman of the Massachusetts Senior Care Association, representing skilled nursing, assisted living, residential care and continuing care retirement communities across the Commonwealth of Massachusetts.

Stephen Monroe, Managing Editor and Partner, Irving Levin Associates

Stephen M. Monroe has been a healthcare and senior care financial expert for over 30 years. In addition to being an often-quoted healthcare finance expert in mainstream media, he has published over 50 bylined articles dealing with various aspects of investing in health care and senior housing. He is also called upon to keynote and speak at organizations such as the American Seniors Housing Association, Assisted Living Federation of America, National Investment Center for Seniors Housing and Care, American Health Care Association and the New York State Health Facilities Association, among others.

After Steve received his MBA in Finance from Columbia University, he began his career at Kidder, Peabody & Co. in New York City where he completed a variety of public equity, bond and merger and acquisition transactions and eventually became a vice president of investment banking.

This effectively prepared Steve for his 1986 purchase of the publishing firm Irving Levin Associates, Inc., which specializes in the seniors housing and health care investment markets. Steve has been the firm's co-owner and Seniors Housing & Care expert for nearly 30 years — serving as editor of *The SeniorCare Investor* newsletter and *The Senior Care Acquisition Report*. Additionally, he serves as Managing Editor, oversees all of the other publications, and moderates many of the company-produced webinars.

Under Steve's leadership, these publications have won numerous industry awards from the American Society of Healthcare Publication Editors (ASHPE), including but not limited to, Newsletter of the Year (2012, 2010, 2009), Gold Award for Best Blog (2013, 2011, 2007) and Gold Award for Best Single Newsletter Issue (2009, 2008).

Steve uses his expertise to give back in his community, having served on several boards including Prism Health Care and the Waveny Care Center Community Board.

Paul Ogier, Chief Financial Officer, Lutheran Senior Services

Paul Ogier is the co-founder of Provident Group, which became a subsidiary of LSS in June 2001. He served LSS as Vice President of Development and Other Services until he was named Chief Financial Officer in 2006. His professional career began in 1981 as a consultant with Laventhol & Horwath, a national accounting firm.

Paul has a B.S. degree in Finance from Missouri State University and is a Certified Public Accountant (CPA). He has a vast knowledge of development, operations and financing, with a special emphasis on project financing. Paul has been a leader in the senior housing industry for over 20 years.

Robert Siebel, President, Carriage Healthcare Systems

Robert Siebel, CFACHCA, is President of Carriage Healthcare Companies, Inc., a multi-state operator of long term care facilities as well as a consulting firm providing services to facilities, financial institutions and other entities interested in the field of long-term care.

A licensed administrator since 1971, Bob has served as President of the American College of Health Care Administrators, as Chairman of the Long Term Care Professional Technical Advisory Committee for the Joint Commission on Accreditation of Healthcare Organizations, and has conducted seminars for nursing home professionals in over 45 states to groups such as the American Hospital Association, the American College of Healthcare Executives, the Chicago Municipal Analysis Society, the Health Care Financial Management Association and others.

Bob has served as an expert witness in a dozen states, has published numerous articles on various aspects of long term care and was the recipient of both the Distinguished Service Award and the Educator of the Year Award from the American College of Health Care Administration.

Bob is the author of *A Very Personal Look at the First 50 Years of Long Term Care*, which is a touching and often humorous overview of the senior care industry from its infancy, the development of regulation, the beginnings and progression of Medicare/Medicaid and life as an administrator in the ever-changing landscape of senior care.

ACQUISITIONS – TARGETING, VALUING, PRICING AND FINANCING

Henry Keith, Chief Financial Officer, Westminster Communities of Florida

Henry Keith has an extensive background in the healthcare industry. He started his career in public accounting with Moore Stephens Lovelace, working with nursing homes and continuing care retirement communities. In 1992, he joined Westminster Communities of Florida as the Controller and three years later was promoted to Chief Financial Officer. Hank is responsible for safeguarding the assets of the corporation, reporting and analyzing financial activities, acquisition, due diligence, tax exempt bond issues, information systems, annual budgets, annual audits, Medicaid/Medicare cost reports, tax returns, cash management and investment management for each of Westminster's communities.

Hank received a Bachelor's degree in Accounting from the University of Florida in 1983 and is a Certified Public Accountant.

Doug Leidig, President and Chief Executive Officer, Asbury Communities

A licensed nursing home administrator in Maryland and Pennsylvania, Doug Leidig's current role as President & Chief Executive Officer of Asbury Communities, Inc., continues more than 25 years of experience dedicated to enhancing and enriching the lives of older adults. During more than 18 years with Asbury, he has remained firmly committed to the organization's mission to "do all the good we can by providing exceptional lifestyle opportunities to those we serve."

During Doug's career, he has overseen the operations of several senior living communities and implemented numerous advancements in care and wellness for residents within those communities. Doug previously served as the Chair and Vice Chair of LeadingAge Maryland, and in April 2015, he was selected to join the advisory board for Senior Living 100, the premier leadership event for C-level executives from the nation's largest, most progressive assisted living, independent living and continuing care providers dedicated to advancing the role of senior living in the continuum of care. Doug also previously served on the Kairos Health Systems Board of Directors.

Doug holds a Bachelor's degree in Long-Term Care Administration from York College in Pennsylvania and a master's degree in Business Administration from Mount St. Mary's University in Maryland.

Allen McMurtry, Executive Director, Cushman & Wakefield

Allen McMurtry is responsible for the origination and execution of senior housing sales nationally for Cushman & Wakefield. With 29 years of experience in senior housing brokerage, Allen has sold 165 communities throughout the country with an aggregate value of over \$2 billion.

Allen has exclusively represented sellers of senior housing properties across the United States since 1986. He has represented numerous types of owners, including publicly traded companies, institutional real estate investment advisors, lenders, bond trustees, not-for-profits and individual owners. For these owners, Allen has sold 136 Senior Housing communities with aggregate sales volume of over \$1.6 billion. Since 2005, Allen has sold eight entry fee CCRCs.

Allen graduated from Vanderbilt University with a degree in Economics. He is a licensed Real Estate Broker in 10 states.

Rutul Shah, Partner and Principal, Birchwood Healthcare Partners

Birchwood Health Care Properties is a Chicago-based health care investment firm that invests across the post-acute sector, including skilled nursing, senior housing and related ancillary businesses. Rutul Shah, Partner and Principal of Birchwood has extensive experience in healthcare private equity across many post-acute sectors, including 12 Years of transaction experience in private equity and as an advisor.

Rutul was previously with Creative Health Capital, Linden, LLC and Merrill Lynch & Co. He graduated from Northwestern University with a BS in Bio-Engineering and received his MBA with honors from the University of Chicago.

PREPARING FOR AND LIVING THROUGH NATURAL DISASTERS

Michael Ferreira, Executive Vice President of Sales and Distribution, Propel Insurance

Michael Ferreira, EVP of Sales and Distribution, has worked in the insurance industry since 1990. He joined Propel's Tacoma office in 1996 in the Commercial Insurance Division as Commercial Manager as well as Marketing Manager. He was named Sales Manager in 1997 and was appointed to the Company's Executive Committee in 2000. In 2002, Michael assumed additional responsibilities as Director of Sales for the company. As Director, he is part of a sales leadership group that supports Propel's Sales Coaches and Sales Executives throughout its network of branch offices.

Prior to joining Propel, Michael worked for Safeco Insurance Company in Redmond, Washington as a Claims Adjuster and then as a Commercial Underwriter. His areas of underwriting expertise include senior living/retirement communities, construction, manufacturing, workers' compensation and professional liability.

Michael is a graduate of the University of Puget Sound with a Bachelor's degree in Economics and Business Administration. He also earned the professional insurance designation Chartered Property Casualty Underwriter (CPCU).

Bruce Glanzer, President/CEO, Good Shepherd Community

Bruce Glanzer has been President/CEO of Good Shepherd Community in Sauk Rapids, Minnesota since 1999. The Community sits on a 30-acre campus and provides a full continuum of care, from patio home living to subsidized and market rate senior apartments (with or without assisted living services), a home health care agency, memory care cottages and a skilled nursing facility. Good Shepherd also provides the Home Delivered Meals program to seniors in Sauk Rapids and Sartell.

Bruce was previously CEO/Administrator for Beverly Enterprises for more than 20 years. He received his Bachelor's degree in Chemistry from the University of South Dakota.

Bruce Jones, Chief Executive Officer, LCPS Management

Prior to being named Chief Executive Officer of LCPS Management in November of 2012, Bruce Jones was the Director of Health Services at Vicar's Landing, a resort retirement community located in Ponte Vedra Beach, Florida. During his tenure in that role, Bruce led both Vicar's Landing and its sister community, Glenmoor, through the accreditation process of CARF-CCAC. He was also responsible for multiple Governor's Gold Seal Awards of Excellence in Long Term Care for Vicar's Landing and created the Vicar's Landing Home Health Agency to service both communities and capture private pay revenue. Prior to joining Vicar's Landing, Bruce was the Administrator and President of a 120-bed, free-standing skilled nursing facility in Gainesville, Florida.

Bruce serves as a LeadingAge Advocate, is Chairman of the Education Committee and is a member of the Governance and CCRC Public Policy committees. He also serves on the Board of Directors of the St. John's County (Florida) Council on Aging. He is an active Rotarian at the Rotary Club of Ponte Vedra Beach. He is the former Treasurer, President and member of the Board of Directors of the Florida Chapter of the American College of Health Care Administrators.

Bruce has a Bachelor of Science in Psychology from the University of Central Florida and a Master of Business Administration from the Crummer Graduate School of Business at Rollins College. He is a Fellow of both the American College of Health Care Administrators and the LeadingAge Leadership Academy. Bruce holds a Florida Nursing Home Administrator license, is a licensed Preceptor and has completed the CORE assisted living training.

Michael Morris, Chief Operations Officer, Pacific Retirement Services

Michael Morris has worked for PRS since 1998, when he began in Resident Services. Since then, he has overseen the operations of skilled nursing, assisted living and memory care facilities, multi-level retirement communities (“MLRCs”) and CCRCs in California and Oregon. In addition to serving as Executive Director for University Retirement Community in Davis, California, Mike has been involved in CCRC startups and acquisitions in multiple states. He has supported the operational and financial turn-around of several retirement communities throughout the west coast, including the repositioning of campuses and conversions from MLRCs to CCRCs.

Mike is a licensed Nursing Home Administrator in California and Oregon, and a certified Residential Care Facilities for the Elderly Administrator in California. He is a member of LeadingAge, and served as Vice Chair on the Board of Aging Services of California (now LeadingAge California).

Mike holds a B.A. in Psychology and Business Administration from the University of Puget Sound in Washington.

I GOT SICK THEN I GOT BETTER

GUEST SPEAKER

Jenny Allen, Author and Performer

Jenny Allen is a humorist and an ovarian cancer survivor. Her essays and articles have appeared in The New Yorker and The New York Times among many other publications. Her book, “Would Everybody Please Stop? Reflections On Life And Other Bad Ideas”, was published in June.

Ms. Allen’s one-person show, “I Got Sick Then I Got Better”, has been seen in theaters across the country. She serves on the Board of the Ovarian Cancer National Alliance.

THE POWER OF DESIGN TO ENRICH THE HUMAN EXPERIENCE

Tama Duffy Day, Firmwide Health & Wellness Practice Area Leader, Principal, Gensler

Tama Duffy Day, LEED AP, is an interior designer, strategist and translator who seeks to align business and operational strategies with the physical and social environment. A principal and Firmwide Health and Wellness practice area leader with Gensler in Washington, D.C., she leads teams and clients in leveraging the power of design to impact lives and enrich communities.

Tama is a frequent columnist, lecturer and spokesperson who has received more than 60 awards and honors for her work. For three consecutive years, she was named one of the “Most Influential People in Healthcare Design” by *Healthcare Design* magazine. She is one of a few professionals to become a Fellow with the American College of Healthcare Executives, the International Interior Design Association and the American Society of Interior Designers.

Tama volunteers for a diverse group of organizations whose missions range from healthcare and academics to aging in place. She is a Fellow with the American College of Healthcare Executives. She serves on the boards of Capitol Hill Village, the Healthcare Facilities Symposium and the CARITAS Project. Tama is also on the editorial board of *Medical Construction and Design* magazine.

She received an M.F.A. in Interior Design Research from Marymount University and a B.S. in Interior Design from North Dakota State University. Both alma maters have recognized her with alumni achievement awards.

Jordan Goldstein, Regional Managing Principal, Gensler

Jordan Goldstein, Managing Principal of Gensler's Southeast Region and a Board Member of the firm, is an award-winning architect who uses design to help clients unravel complex problems and craft relevant solutions that evolve their businesses and brands.

Throughout his 20-plus-year career, Jordan has provided vision and leadership on projects that range in scale from China's Duke Kunshan University campus to Thailand's 60-story Siam Square Tower to mixed-use projects in the Washington DC metro area. What unites these diverse projects is an interdisciplinary approach and a focus on the user experience, resulting in spaces equally attuned to functional considerations and visceral impact.

For Jordan, a project typically has a larger story than what appears at the outset. Thus, much of his effort focuses on teasing out hidden opportunities to help clients realize unforeseen benefits. As a result, his projects have won numerous awards from the American Institute of Architects (AIA), International Interior Design Association (IIDA), and NAIOP, among others. His work has also appeared in various periodicals, including *Architect*, *Interior Design*, *Contract*, *Fortune*, *US News & World Report*, *The Washington Post*, and *Dwell*. His views on leadership have been included in several books including Lorraine Segil's *Fast Alliances*.

In addition to being recognized for his design skills, Jordan has also been honored for his leadership. In 2013, 2015 and 2017, he was included among the *Washington Business Journal's* "Power 100" list of the most influential area business leaders. He was also recognized by *Building Design & Construction* and the *Washington Business Journal* as one of their "40 under 40" design leaders.

An advocate of helping the next generation of designers prepare for tomorrow, Jordan teaches a graduate course on design at the University of Pennsylvania, where he earned his Master in Architecture and served as the Kea professor at the University of Maryland, where he earned his Bachelor of Science in Architecture.

Liz Resenic, WELL Accredited Professional

Liz Resenic is a sustainability specialist in Gensler's Washington, D.C. office and has been deeply involved in the development of the firm's WorkWell Model, as well as an active contributor to Gensler's internal Wellbeing initiatives. She is keenly interested in a holistic view of sustainability seeking to implement strategies that are enduring in their resource consumption, impact to the environment and ability to augment the wellbeing of the occupants.

To realize this, she works closely with offices throughout the firm, with a focus on the Southeast region, to integrate sustainable design and wellbeing practices on a variety of project types ranging in scale from a 2,000 SF retail bank to a 4.5 million SF corporate office campus.

Liz received her Bachelor of Architecture from Kent State University and is a WELL Accredited Professional, a member of the US Green Building Council and a Fitwel Ambassador.

LET'S HEAR FROM THE LEADERS: SETTING THEMSELVES APART

Lynne Katzmann, *Founder and President, Juniper Communities*

With 22 properties in four states and more than 1600 employees, Juniper had over \$70 million in revenues in 2016. Celebrating its 30th Anniversary in 2018, 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 from the London School of 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 act 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."

Juniper has been known as a thought leader and innovator within the senior's housing industry since its inception. Currently Lynne's focus is on promoting senior living as a population health solution for that segment of the senior population defined as high care and high needs. These are the small portion of Medicare recipients who are most in need of coordinated care and service. Her brain-child, Juniper's Connect4Life program shows real promise in promoting well-being for this cohort.

Lynne has been involved in the health care industry for nearly 35 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.

Dan Lavender, *President/CEO, Moorings Park*

Daniel (Dan) Lavender is President and Chief Executive Officer of Moorings Park Institute, Inc. He assumed the full responsibilities of Chief Executive Officer in 2009 and has been with Moorings Park since 2006. The recipient of a Master's in Business Administration degree from Ohio University, an Ohio Certified Public Accountant license, and a Bachelor of Arts in Accounting and Economics from Bluffton College, he has spent the majority of his career serving seniors. Earlier, he was Chief Financial Officer for Methodist ElderCare Services in Columbus, Ohio, helping to guide it through a period of strategic growth and improving financial performance.

Previous assignments included regional and division leadership roles at Ohio Presbyterian Retirement Services, one of the 15 largest multi-site, non-profit senior living organizations in the country.

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 its 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.

Paul Winkler, *President/CEO, Presbyterian SeniorCare*

Paul Winkler is President and CEO of Presbyterian SeniorCare (PSC), a continuum of senior housing and care communities and services at 40 locations across 9 counties of southwestern Pennsylvania serving approximately 6,000 older and disabled persons annually. Paul has been with PSC since 1987 and has served as Senior Vice President and Chief Operating Officer for the PSC system, overseeing its range of services and facilities including Woodside Place, the internationally recognized specialty care facility for persons with Alzheimer's disease. Mr. Winkler was elected President and CEO in March of 1999.

Prior to joining PSC, Mr. Winkler worked as an administrator within Allegheny County's John J. Kane Hospital/Kane Regional Center's long-term care system.

A graduate of Pennsylvania State University with a B.S. degree in Health Planning and Administration, and a B.A. degree in General Arts and Sciences, Paul also holds a Master of Public Health degree in Health Administration from the University of Pittsburgh. He has represented PSC on numerous local, state and national boards and advisory committees.

THE SCIENCE OF EMOTION AND HOW IT FUELS YOUR BRAND

GUEST SPEAKER

James L. McQuivey, Ph.D, Vice President, Principal Analyst, Forrester Research

James serves CMOs. He is the foremost analyst tracking and defining the power and impact of digital disruption on traditional businesses. His consumer models identify the ways consumers have embraced digital experiences and platforms, and his strategy models help companies prepare to serve those consumers. He applies this knowledge to a wide variety of industries, from consumer media to consumer technology, from financial services to retail and consumer products. In February 2013, James published his book *Digital Disruption: Unleashing the Next Wave of Innovation*.

Previously at Forrester, James served as a vice president and research director, running Consumer Technographics® North America, Forrester's unparalleled consumer research effort. In addition to keynoting at industry events and Forrester Forums, James is routinely sought after for comment by such publications as *The New York Times* and *The Wall Street Journal*. He also appears frequently on NPR and CNBC. James came to Forrester after teaching marketing research and media management at Boston University's top-rated College of Communication. In addition, he has served as research director at WGBH in Boston and as a graduate fellow at Syracuse University.

James earned his Ph.D. in Mass Communication Research at Syracuse University. He also holds an M.B.A. with an emphasis in marketing.