Speakers



Marvell Adams Chief Operating Officer

The Kendal Corporation

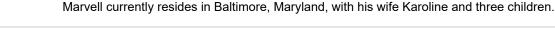
Marvell Adams Jr. is an aging services professional, serving The Kendal System since 2011.

Marvell's career began over 15 years ago at Monroe Community Hospital (LTC) in Rochester, NY, where he became a licensed nursing home administrator. He remained in Rochester for seven years as Administrator/COO for The Highlands at Pittsford, a senior living community affiliated with the University of Rochester Medical Center. Marvell also took on numerous other roles inside and outside of the URMC system including LEAN performance improvement facilitator, dementia skills coach and CARF-CCAC surveyor.

When the opportunity to serve Collington – A Kendal Affiliate arose, Marvell, a native South Carolinian, was happy to move back toward warmer climates. He has led the successful restructuring of Collington's debt, development of a comprehensive strategic plan and oversaw the stabilization of independent living occupancy. Recently, Marvell was honored of becoming a member of the LeadingAge Board of Directors.

Marvell currently serves the residents, staff and board members of the Kendal System as Chief Operating Officer. Only the second individual in Kendal's history to serve in the role.

Marvell received his undergraduate degree in Political Science at the College of Charleston in South Carolina and his Master of Healthcare Administration from the School of Public Health at the University of North Carolina at Chapel Hill. In contributing to the academic community and helping to cultivate the next generation of aging services professionals, Marvell, in the capacity as Director for Emerging Talent of the Kendal Corporation, was a regular guest speaker at Cornell University, UNC – Chapel Hill, Penn State and University of Maryland Baltimore County.





Steven Ailey CFO

Forefront Living

Mr. Ailey, chief financial officer for Forefront Living, has 22 years of experience in financial and operations management. His background is with both non-profit healthcare organizations and financial firms. Steven is a strong leader who develops and enhances teams to achieve long-term financial and mission driven objectives.

In Steven's former role as corporate vice president for Greystone Communities, Inc., he provided oversight of the accounting & financial reporting functions with a team of accountants that provided controller/CFO functions for retirement communities managed by Greystone. His responsibilities included the analysis of operating results, projection of future performance and compliance with regulatory reporting requirements.

Additional responsibilities included the development of policies and procedures, the implementation of accounting

systems, the reporting of monthly financial outcomes, the development of annual budgets and long term forecasts, the creation of real time key indicator analyses and financial reports and the coordination of annual audits. In addition, Steven was a corporate specialist for financially complex and operationally challenged communities.

Steven received his Bachelor of Science degree in accounting from the University of North Texas and is an active licensed CPA.



Stuart Almer
President & CEO

Gurwin Healthcare System

As President and CEO of Gurwin Healthcare System, Mr. Almer oversees Gurwin Jewish Nursing & Rehabilitation Center, Gurwin Jewish ~ Fay J. Lindner Residences, Gurwin Home Care Agency and Gurwin Healthcare Foundation. Prior to joining Gurwin in 2015, Mr. Almer served as Executive Vice President and Chief Operating Officer at Parker Jewish Institute for Health Care and Rehabilitation, and prior to that as Vice President, Operations at Peninsula Hospital Center. Mr. Almer has also held senior management positions at Syosset Community Hospital, Brookdale University Hospital Medical Center and Huntington Hospital.

In a career spanning more than 30 years, Mr. Almer has garnered substantial administrative and management experience in both the acute care and long-term care settings. Since joining the Gurwin team in 2015, Mr. Almer has been responsible for the day-to-day operations of Gurwin's 460-bed nursing and rehabilitation center. In that time, he spearheaded the creation of a 60-bed memory care unit, expanded the adult day care program to include a social program for those with mild to moderate dementia, and has influenced change in the facility's CMS rating to five stars, among other highlights.

Mr. Almer is an Adjunct Professor in the Masters in Health Administration Program at Hofstra University, and previously served in a similar capacity in Hofstra's Gerontology Program. He often lectures to community and civic organizations on quality, leadership, the status of long-term care, and the overall state of the healthcare system. Mr. Almer received his undergraduate degree from SUNY College at Purchase, and possesses an MBA Degree in Hospital Management from Adelphi University. He holds a Certificate Degree from Molloy College, and is a New York State licensed Nursing Home Administrator. Mr. Almer is also a Fellow of the American College of Healthcare Executives.



Kevin Anderson President/CEO

Wesley Homes

Kevin became the Executive Director of Wesley Homes in Des Moines, Washington in 1999, with prior experience in management of skilled nursing homes, senior housing, assisted living, home health care, adult day services and other areas of senior services. In 2005, he became the President and CEO of Wesley Homes Corporation which oversees development and overall management of several entities including: Wesley Homes Des Moines, Wesley Homes Lea Hill, Wesley Homes Foundation, Wesley Homes Community Health Services, and Wesley Homes at Home. He holds Masters Degrees in Human Services, Planning, and Administration; and in Church History; as well as a BA in Religion with a minor in Sociology. Kevin is active in community service organizations and has held Board and leadership positions with health and housing organizations both statewide and nationally.



Mary Ellen Bloodgood

CEO

Menorah Park, Inc.

Mary Ellen Bloodgood is the Chief Executive Officer of Jewish Home of Central NY/Menorah Park, a healthcare campus located in Syracuse. NY. She has been employed at Menorah Park since 1987 when she was hired as the Chief Financial Officer. In 2004, she became Chief Executive Officer.

Under Ms. Bloodgood's leadership, the Jewish Home has expanded its role in the central New York region and provides healthcare, community based services and housing. Today, the organization includes a skilled nursing facility, inpatient rehabilitation, moderate, low and market rated senior housing, home health, medical adult day, group residence for individuals with developmental disabilities, institute for applied research on aging, historical museum, specialized dementia care and Syracuse Jewish Family Service.

Mary Ellen has served on several local, state and national boards and committees, and is very involved in policy and advocacy for seniors. She is currently Vice President of the Board of Directors of the Association of Jewish Aging Services in Washington, DC and past Treasurer of LeadingAge New York Board of Directors.

Mary Ellen was awarded the Dr. Herbert Shore award from the Association of Jewish Aging Services in 2014. Ms. Bloodgood is also a past recipient of Syracuse Temple Adath Yeshuruh's Citizen of the Year in 2014 and Regional Non Profit Executive of the Year Award in 2017.



Meredith Boyle

Senior Vice President, Strategic Initiatives

Mather Lifeways, Inc.

Meredith Boyle serves as a catalyst for innovation in developing strategic partnerships, collaboration and alliances that supports the mission, vision, goals and values of Mather.

Her unique skill-set helps expand strategic partnerships, affiliations, and relationships with senior living providers, organizations, companies, and educational institutions to increase Mather's reach and grow the number of older adults served. She also serves as a catalyst for innovation, working with team members to conceive and implement innovative practices and approaches to serving older adults, with special emphasis on workforce initiatives and wellness.

Meredith brings more than 30 years of strategic and results-driven industry experience to Mather, with experience in marketing, sales, branding, finance and enterprise growth, and most recently utilized her talents as the Chief Strategy Officer for an investment banking firm.

In addition, Meredith held various leadership positions for a large not-for-profit, multi-site senior living provider where she achieved unmatched occupancy results despite challenging economic conditions. As an innovator and sales trainer, Boyle developed system-wide promotional strategies, best practices, and measurement tools. She also spearheaded branding efforts for all business lines by directing the organization's brand identity strategy, websites and multi-channeled publication and digital platforms.

Ms. Boyle has spoken internationally and is a frequent speaker at senior living conferences.



Jonathan Cook
President & CEO

LifeSpire of Virginia

In December 2014, Virginia Baptist Homes, now LifeSpire of Virginia, called Jonathan R. Cook to serve as its new President and CEO, succeeding Dr. Randall Robinson, who retired after 20 years of service.

Jonathan brings two decades of valuable experience in the senior living industry, with the majority of service in the not-for-profit sector. He began his career in senior services with Lutheran Homes of South Carolina, near Charleston. Lutheran Homes, a faith-based, not-for-profit operator of retirement communities and allied services for senior adults in South Carolina. At Lutheran Homes, Jonathan directed Franke at Seaside, a CCRC in Mt. Pleasant, across the river from the Charleston harbor.

After growing with Lutheran Homes, Jonathan joined Life Care Services, LLC, a national developer, owner, operator and manager of retirement communities throughout the United States. With LCS, Jonathan served as both an Executive Director and a Regional Director of Operations Management where he provided oversight to 12 mostly not-for-profit communities.

Jonathan is originally from the Philadelphia area. He is a graduate of Stockton University and is a licensed Nursing Home Administrator in VA, NC and SC. Jonathan is married to Barbara and they have two daughters. They are an active, sports-loving family, and Jonathan especially loves to play golf.

In his short tenure with LifeSpire, Jonathan has led the organization to re-envision the possibilities for residents and staff, especially emphasizing customer service and hospitality. He prides himself on the ability to bring proper balance to margin and mission in serving seniors and has challenged the organization to value its faith-based heritage while positioning the communities anew to better meet the needs and desires of today's and tomorrow's retirees in Virginia.



Jason DuPont

Civitas Senior Living

Jason Dupont serves as CFO and Partner in Civitas Senior Living based in Fort Worth, TX. Since he joined the Civitas family in 2013, Jason has been instrumental in the growth of the organization, being responsible for the financial projections, performance development, banking and investor relations, and budget development and compliance. Jason is a graduate of the University of Texas in Austin with a Bachelor of Arts in Humanities and an MBA from the University of New Orleans. He has engineered over \$2B in senior living transactions during his twelve-year career in the industry. He credits his success to his decade of previous experience as an assistant chief financial officer for a major regional operator, where he grew their assets from fewer than 10 buildings to almost 40.



Jon Fletcher Vice President

Presbyterian Homes & Services and Senior Housing Partners

Jon Fletcher is Vice President with Presbyterian Homes & Services (PHS) and Senior Housing Partners. Jon provides leadership to a variety of real estate and financing initiatives and brings over \$1.5 billion in project development experience to the table for both internal and external client partners. Prior to joining the PHS staff, Jon served on the PHS Board of Directors as well as the Board of Trustees of Crown College and several other non-profit organizations. Previously, Jon was a Vice President at Lennar Multifamily Communities, a subsidiary of Fortune 500 company Lennar, where he specialized in the development of multi-family and mixed-use apartment communities. Jon has over 10 years' experience in real estate, development, for-profit and not-for-profit leadership, entrepreneurship, and finance. Jon is also a veteran of Operation Iraqi Freedom, having spent 8 years in the Army Reserves. Jon was the youngest recipient of the 2012 '40 under Forty' award from Minneapolis-St. Paul Business Journal. Jon holds degrees in

Christian Ministry and Music Performance from Crown College and an MBA in Finance from UW-Whitewater and has completed executive education course work at MIT.



Rosemary Jordan, MPH, MPP

VP Business Development & Strategies

Elder Care Alliance

Since joining ECA in 2016, Rosemary Jordan has led the organization's growth strategy and been a key participant in workforce and innovation strategic planning and execution. Her focus is on expanding ECA's unique and personalized services to more Californians.

With 20+ years of health care and consulting leadership experience, Rosemary is a seasoned leader with the knowledge and creativity to help realize ECA's strategic vision. Prior to Elder Care Alliance, Rosemary held senior positions at Blue Shield of California and Kaiser Permanente, with experience in Business Development, Operations, Quality Improvement, Sales and Strategy.

Ms. Jordan is passionate about creating a more just society that celebrates all voices and experiences. She's leading original research to explore the impact of technology on relationships, the power of mindfulness to reduce caregiver stress, the opportunity to tap into elders' own voices to inform care delivery improvement – and more.

Most recently, Ms. Jordan has taken on ECA's climate action plan, "ECA Green 2030," to refine food sourcing, waste and energy.

Ms. Jordan is a graduate of Vassar College, and received her master's degrees in Public Health and Public Policy from the University of California - Berkeley.

Elder Care Alliance is an Alameda, California-based not-for-profit public-benefit organization that has served elders and their families throughout California for the last 110 years. Operating from both the mind and the heart, their mission is to serve and enrich the holistic wellness of older adults through education, innovation and a network of professionals. Elder Care Alliance communities offer assisted living, memory care, skilled nursing and independent living.



Pamela Kaufmann

Partner

Hanson Bridgett LLP

Pam Kaufmann is a partner at the San Francisco law firm of Hanson, Bridgett LLP. For more than 31 years, she has devoted her practice to advising health and senior care providers on issues ranging from tax-exempt law and corporate structuring to patient/resident autonomy, end-of-life, legal capacity, and consent issues. Pam is a recent Chair of the LeadingAge Legal Committee and a recent member of the board of directors of LeadingAge California. She is also a co-author of *Advising California Nonprofit Corporations*, published by the Continuing Education of the Bar of California, and a past Chair of the Tax-Exempt Organizations Committee of the California State Bar. Over the years, Pam has served on several State and federal task forces on behalf of providers and has testified before the IRS on behalf of charities. She was actively involved in drafting California's continuing care and continuing care at home bills. She is a frequent speaker about social issues in health and senior care including marijuana, end of life, mental health, and violence. In 2019, Pam received the "Health Care Law Trailblazers" award from the National Law Journal. She has been recognized for over a decade by "Best Lawyers in America" for her work in the nonprofit/tax-exempt arena. Pam is committed to helping clients find practical solutions to their legal and operational challenges.



Cari Levy MD, PhD.

Professor of Medicine

University of Colorado

Dr. Levy currently is a Professor in the Department of Medicine at the Rocky Mountain Regional Veterans Affairs (VA) Medical Center and the University of Colorado School of Medicine. She serves as Section Chief of Palliative Medicine and Associate Director of the Center of Innovation for Veteran-Centered and Value-Driven Research at the Denver VA Medical Center.

Dr. Levy received her undergraduate degree from Pepperdine University in Malibu, California and her medical degree from the University of Colorado. She completed her residency and chief residency at Vanderbilt University. Her geriatric fellowship and PhD in clinical sciences were completed at the University of Colorado.

Dr. Levy served as President of AMDA (2018-2019) – The Society for Post-Acute and Long Term Care and is an active member of the American Geriatric Society and the American Academy of Hospice and Palliative Medicine. She has been involved extensively in research with a focus on improving nursing home and end-of-life care for older adults with publications of articles related to this research in *Chest, Cancer, Medical Care, JAMA Internal Medicine, The Journal of the American Medical Directors Association, The Gerontologist* and *the Journal of Hospital Medicine*.



Jordan Lovelady

CFO

Morningside Ministries

Jordan Lovelady is the Chief Financial Officer for Morningside Ministries. He has more than 12 years of experience in senior living, operations and finance environments. Before joining Morningside in 2017, Jordan served in various different roles with Buckner Retirement Services, Inc and Raytheon Company in Dallas. He is a graduate of Baylor University where he received his Bachelor of Business Administration in Business Management.



Anthony Luzzi

President

Sims Mortgage Funding

Websites: Online Biography



William Pettit

Vice Chairman

Merrill Gardens

Bill Pettit is the president of the R. D. Merrill Company with responsibility for Merrill Gardens and sister company Pillar Properties. Merrill Gardens is one of the most respected assisted living operators in the country with 70 communities in 20 states. Pillar Properties is an award-winning owner and operator of multi-family housing with 1,700 units in

operation and the developer for Merrill Gardens new communities.

Bill joined the R. D. Merrill Company 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 and Pillar Properties commitment to quality.

Bill was a 2018 Seattle Business Magazine http://seattlebusinessmag.com/profiles/2018-executiveexcellence-awards-bill-pettit-rd-merrill-company. Executive Excellence Award winner and under his leadership the R. D. Merrill Company was named the http://seattlebusinessmag.com/2016-family-businessawards-business-year-large-firms. Family Business of the Year for its commitment to residents, team members and community service.

Bill received a bachelor's degree from Princeton in 1971 and a MBA from the University of Oregon in 1973. He was the first senior living executive in residence for Washington State University. He serves on the Argentum Board of Directors and he is the past Chairman of the Executive Board of the American Seniors Housing Association (ASHA).



Larry Pino, Esq. Founder and CEO

Tuscan Gardens Senior Living

Larry Pino is the Founder and CEO of Tuscan Gardens Senior Living, an upscale senior living company in Winter Park and throughout Florida. Prior to founding the company in 2010, he was the Founder and CEO of a private equity enterprise development and management company. He created some 80 businesses selling over \$1.5 billion of goods and services, employing several thousand employees and generating half a billion dollars of investment capital. His numerous real estate, stock, and investment transactions also exceeded a billion dollars.

By background, Larry is a commercial litigation attorney specializing in business and investment law. He's admitted to practice law in FL, NY, CA and various federal courts nationally.

Larry has spoken in some 5,500 speaking engagements to over one million people and appeared on 140 radio and television talk shows. He teaches courses as an Adjunct Professor on Rapid Enterprise Development and Operating High Performance Organizations at Rollins College.

Larry graduated with a Bachelor's Degree from the University of Notre Dame and a J.D. from New York University Law School. He has received Certificates of Study from the University of Madrid, L'Alliance Française in Paris, and the Centro Linquistico Italiano dante alighieri in Rome and is currently ABD as a doctoral candidate at the Warrington College of Business at the University of Florida.

Larry has authored 11 books including: Finding Your Niche (Berkley-Putnam Publishing), Finding Your E-Niche, The Desktop Lawyer, and Cash In On Cash Flow (Simon & Schuster) and Reinventing Senior Living: Creating a Life of Purpose, Passion & Joy (Impact Publishing). He co-authored Morphing: Radical Evolution for Revolutionary Times with Dr. Craig McAllaster.

Larry and his wife, Janet, are residents of Winter Park, FL and the proud parents of two sons and one daughter.



Aaron Rulnick
Managing Principal

HJ Sims

Websites: Online Biography



Jeffrey Sands Managing Principal

HJ Sims

Websites: Online Biography



Jacob Schaefer CFO

Sante Partners

Jacob Schaefer was the first employee at Santé when it was founded in 2008. As Chief Financial Officer, Jacob provides the company with financial guidance, manages debt and equity relationships, and is integral in looking at new opportunities for company growth. He has a thorough understanding of real estate financial analysis, discounted cash flow analysis, market analysis, and a variety of financing programs (including HUD). Jacob's knowledge and hard work coupled with his drive to uphold Santé's goal of providing seniors with access to the highest quality care has contributed strongly to placing Santé as a leader in the seniors housing and healthcare industry. Jacob started his career working in the construction industry for a family business in 2002. Next he gained great knowledge in the field of Seniors Housing as an associate appraiser at Tellatin, Short & Hansen. During his time with TS&H he completed over 70 valuation and market analysis reports, focusing primarily on proposed construction projects being financed by the US Department of Housing and Urban Development (HUD). His strong financial talent and detailed personality gained him the opportunity to transfer to Santé when it began. Jacob assisted with the market and site selection, due diligence, design, and financing of Santé's first few projects. He was also instrumental in setting up systems for ongoing project budgeting, forecasting, and management allowing for ease of expansion and ongoing development tasks. Jacob graduated with a Bachelor of Science Degree in Finance from Linfield College.



William Sims Managing Principal

HJ Sims

Websites: Online Biography



Bryan Starnes
Chief Financial Officer

Affinity Living Group

Certified Public Accountant (CPA) since 1989

Bachelor of Science in Accounting – Univ of NC – Charlotte 1987

Began public accounting career with Deloitte & Touche 1987 – 1990

Controller – Furniture Manufacturer 1990- 1992

Started CPA firm – Martin Starnes & Associates CPAs P.A. in 1992, sold practice in 2011. The firm was recognized by Accounting Today magazine as "Top 100 Firms to Work For" for the last three years he owned the firm, ranking in the top 10 all three years.

Bryan joined the Meridian Senior Living in January 2012 as the Chief Accounting Officer. In September 2013, Bryan was named the Chief Financial Officer. Affinity Living Group spun out of Meridian in 2016 and Bryan became CFO for Affinity with that change.

Bryan is also an accomplished speaker, offering leadership and accounting training for the American Institute of CPA's, NC Association of CPA's, various trade associations as well as University continuing education programs.

Bryan has been married to Sandy Starnes for 33 years and has three children, four grandchildren.



Toby Tilford Co-Founder & Co-CEOLinks Healthcare Group

Mr. Tilford co-founded Links Healthcare Group in 2017 and currently serves as Co-CEO. Links successfully owns and operates 10 skilled nursing facilities in California.

Prior to co-founding Links, Mr. Tilford served as an executive of Plum Healthcare, where he served as Chief Executive Officer from 2015-2017 and Chief Operating Officer from 2009-2015. Under Mr. Tilford's leadership as CEO and COO, EBITDA increased by approximately 3.5x times.

Mr. Tilford holds a Bachelor of Business Administration in Accounting from Brigham Young University and is a graduate of the Advanced Management Program at Harvard University. He is a certified public accountant and a licensed Nursing Home Administrator in the state of California. He currently serves on the Operator Advisory Board for the National Investment Center (NIC) and has been on the Government Relations Committee for California Association of Healthcare Facilities (CAHF).



Charlie Trefzger

Affinity Living Group

Charles E. Trefzger, Jr. is the founder, President and CEO of Affinity Living Group. Headquartered in Hickory, North Carolina, ALG provides assisted living and memory care services to residents throughout the southeast.

ALG's genesis is rooted in Trefzger's entrance in Long Term Care in 1986. Over the following decades, spanning a wide spectrum of hands-on experiences, he has developed a keen understanding of the daily needs and challenges of the senior community. This is the impetus for his vision of providing value-driven, cost-conscious senior housing services to those needing assistance with the most fundamental tasks of daily living. This has remained his singular goal and foremost consideration for more than thirty years.

Trefzger has served for twenty years on the Executive Board of the North Carolina Senior Living Association and serves on the National Board of Directors of Argentum, senior housing's national trade organization.

Trefzger holds a Bachelor of Science in Business Administration degree from Virginia Commonwealth University and a Juris Doctor degree from Wake Forest University. A licensed North Carolina attorney, he also serves as Chairman of

the Board of Visitors for the Wake Forest University School of Law and helped create the Wake Forest School of Law Center for Health Law and Policy.

An avid student of American history, Trefzger is also a Trustee of The American Battlefield Trust. Married with three children, he resides in Hickory, North Carolina.

Keynote Speaker



Robert Genetski

Economist

Dr. Robert Genetski is one of the nation's leading classical economists. He is known for using humor and anecdotes to make complex economic issues easily understandable. For five consecutive years, speaking.com named him as one of the top-five speakers in the field of economics and finance.

He has authored five books on classical economic principles. His latest book, *Rich Nation, Poor Nation*, provides detailed evidence showing why some nations prosper while others fail. For the past 25 years, Dr. Genetski has provided economic and financial advice through his consulting firm. He has appeared on CNN and Fox News, as well as and nationally syndicated radio and TV programs. His articles have appeared in Fortune Magazine, the Wall Street Journal and Investors' Business Daily.

Dr. Genetski has served as a professor of economics at University of Chicago's Graduate School of Business and at New York University. He has held various positions in the financial industry, including Senior VP & Chief Economist for Chicago's Harris Bank, money manager, investment advisor and director of investment research.



Matthew Lieberman

Professor and Social Cognitive Neuroscience Lab Director, UCLA Department of Psychology, Psychiatry

Dr. Matthew Lieberman is a professor at UCLA and considered one of the founders of the field of Social Neuroscience. He is the best-selling author of *Social: Why Our Brains Are Wired to Connect*. He has also published more than 200 articles and chapters in journals such as *Science* and *Proceedings of the National Academy of Sciences*. His work has received worldwide attention from outlets like the *New York Times, HBO, Time Magazine*, and *Scientific American*. Dr. Lieberman won the American Psychological Association's Distinguished Scientific Award for Early Career Contribution to Psychology (2007) and the Society for Experimental Social Psychology Career Trajectory Award (2015). *Science* magazine named him one of the "Top 50 Science Stars of Twitter."

He is currently working on his next book, *Lenses: How Our Seeing Shapes Who We Are, How We Work, and Why the World Seems Crazy.* Dr. Lieberman is founder and chief scientist of Resonance Inc., an organization that helps businesses and employees to thrive through advanced mobile neuroscience techniques. He is also chief scientist at Imagining Human where he is working to create a tool that assesses the variety of lenses we use to see the world and using this tool to help organizations create teams that are positioned to 'see' more and thus, innovate more.



Gary Milner
EVP, Development, At Sea & Senior Living
Canyon Ranch

Gary Milner has been instrumental in extending the brand to new audiences, helping to establish the award-winning Canyon Ranch spa + fitness in Las Vegas, co-developing the same concept for the At Sea division, and negotiating several international resort and residential property transactions. A former private practice lawyer, he also serves as a legal advisor to various Canyon Ranch business entities.