

AGENDA & SESSION DESCRIPTIONS

DAY 1: TUESDAY, AUGUST 21, 2018

8:00-9:00 a.m. Registration, Continental Breakfast & Exhibitor Fair

| Time | Financing | Property Management | Development | Homeownership |
|-------------|--|--|---|---|
| 9:00-10:30 | <p>National Housing Trust Fund Essentials</p> <p>Learn the basics of the National Housing Trust Fund Program in Oklahoma and hear case studies from successful recipients.</p> <p><u>Panelists:</u> Greg Shinn, Mental Health Association Oklahoma, & Sharon Wise, Native American Housing Services, Inc. <u>Moderator:</u> Darcy Green, OHFA</p> | <p>Aging in Place</p> <p>A leading national expert discusses how to modify housing to allow residents to age in place.</p> <p><u>Presenter:</u> Jack Werner, A to Z Inspections</p> | <p><u>Required</u> Fair Housing, ADA & Section 504 Training for Developers, Architects and Contractors</p> <p>Architects, contractors and developers can complete the required training for 2019 LIHTC applications during this day long course.</p> <p><u>Presenters:</u> Mark English, E&A Team, & Scott Moore, Attorney</p> | <p>Reverse Mortgages: Salvation or Scam?</p> <p>Reverse mortgages allow homeowners to borrow money against the equity they've accumulated in their home. While these mortgages may allow seniors some choices in retirement, what happens when the loan exceeds the value of the home or the senior can no longer afford to pay for taxes, insurance and upkeep?</p> <p><u>Presenter:</u> Tricia Auberle, Oklahoma Homebuyer Education</p> |
| 10:30-10:45 | Break / Exhibit Viewing | | | |

**Please note that sessions and speakers are subject to change and will updated periodically.*

| | | | | |
|------------|---|---|---|---|
| 10:45-Noon | <p>Funding Through the Federal Home Loan Bank of Topeka & the Federal Reserve Bank of Kansas City-OKC Branch</p> <p>Learn about funding opportunities through the Federal Home Loan Bank AHP and the Federal Reserve Bank of Kansas City Investment Connections Program.</p> <p><u>Presenters:</u> Tom Thull, Federal Home Loan Bank of Topeka, & Steve Shepelwich, Federal Reserve Bank of Kansas City-OKC Branch</p> | <p>Income Averaging</p> <p>Understand how the new income averaging option will impact leasing and compliance monitoring.</p> <p><u>Panelists:</u> Sandra McGougan, OHFA; Garth Rieman, National Council of State Housing Agencies; Mike Celkis, CohnReznick; and Jim Rice, Arzon Development Company, LLC.</p> <p><u>Moderator:</u> <i>TBD</i></p> | <p>Required Fair Housing, ADA & Section 504 Training for Developers, Architects and Contractors continued...</p> | <p>Native American Housing Resources</p> <p>HUD's Office of Native American Programs offers a broad array of Indian Country specific housing programs. Programs include the HUD_VASH, Indian Housing Block Grant Program and HUD Section 184 Indian Home Guarantee Program. Learn which programs are available on and off native land, serve homeless veterans or support housing development.</p> <p><u>Panelists:</u> Michelle Tinnin, HUD Native American Programs, & Nancy Bainbridge, Bank 2</p> <p><u>Moderator:</u> Sandra Kerr, FDIC</p> |
| Noon-1:30 | <p>Luncheon & General Session: Welcome & Purpose Greg Shinn, OCAH Board President & Deborah Jenkins, OHFA Executive Director Keynote Speaker: Beth VanDuyne, Regional Administrator, U.S. Department of Housing and Urban Development Southwest Region</p> | | | |
| 1:30-2:45 | <p>New Markets Tax Credit Basics and their Role in Affordable Housing</p> <p>A session focused on introduction New Markets Tax Credits (NMTC) financing and how NMTC can benefit community development. The session will also discuss how NMTC financing can be used to fund affordable housing or be paired with Low Income Housing Tax Credits to create high impact projects serving low income communities.</p> <p><u>Presenter:</u> Monica Clark Petersen, S.B. Clark Companies</p> | <p>SQ788: Now What?</p> <p>A panel of experts discuss property management issues related to the passage of SQ788: Medical Marijuana.</p> <p><u>Presenters:</u> David Chapman, Phd.D, University of Central Oklahoma; Chris Cotner, Attorney; & Mark Woodward, Oklahoma Bureau of Narcotics</p> <p><u>Moderator:</u> Chris Griswold, Attorney</p> | <p>Required Fair Housing, ADA & Section 504 Training for Developers, Architects and Contractors continued...</p> | <p>Oklahoma Homebuyer Resources</p> <p>Presenters will cover Oklahoma-specific affordable housing resources such as down payment assistance, programs for specific populations such as teachers and fire fighters, and rehabilitation programs.</p> <p><u>Presenters:</u> LeeAnn Smith, OHFA; Tom Thull, Federal Home Loan Bank of Topeka; & Dena Sherrill, REI Oklahoma</p> |

*Please note that sessions and speakers are subject to change and will updated periodically.

| | | | | |
|-----------|--|---|---|---|
| 2:45-3:00 | Break / Exhibit Viewing | | | |
| 3:00-4:30 | <p>Tax Credit 101</p> <p>Oklahoma Housing Credit experts discuss basic Oklahoma Housing Credits requirements related to the federal Low Income Housing Tax Credit Program including 4% and 9% developments.</p> <p><u>Presenters:</u> Darrell Beavers, OHFA, & Sammy Ehtisham, Midwest Housing Equity Group</p> | <p>Developing & Implementing a Smoke-Free Policy for Housing</p> <p>Explore the intricacies of designing and implementing a smoke free policy for healthy housing.</p> <p><u>Panelists:</u> Matthew Mills, Oklahoma City Housing Authority; Bobbi Jo Lucas, Cornerstone Associates, LLC; & Deb Holcomb, Excel Development</p> <p><u>Moderator:</u> Sara Church, Midwest Housing Equity Group</p> | <p>Required Fair Housing, ADA & Section 504 Training for Developers, Architects and Contractors continued...</p> | <p>Duty to Serve</p> <p>In January 2018, Fannie Mae and Freddie Mac began to execute their Duty to Serve plans which focus on three key underserved market segments: manufactured housing, affordable housing preservation and rural housing / housing on Tribal trust and restricted lands. The plans include new product development, increased loan purchases, ground-breaking research and expanded consumer education aimed at improving access to affordable housing for low- and moderate-income populations.</p> <p><u>Panelists:</u> Kellie Coffey, Fannie Mae, & Kelly Noonan Marrocco, Freddie Mac</p> <p><u>Moderator:</u> Sandra Kerr, FDIC</p> |
| 4:30-6:30 | Cocktail Reception & Networking Event | | | |

**Please note that sessions and speakers are subject to change and will updated periodically.*

DAY 2: WEDNESDAY, AUGUST 22, 2018

7:30 - 8:30 a.m. Registration, Continental Breakfast & Exhibitor Fair

| | | | | |
|-------------|---|--|---|--|
| 8:30-10:00 | Keynote Presentation: Matthew Desmond, Author of <i>Evicted</i> | | | |
| 10:00-10:30 | Break/Exhibitor Fair/Book Signing with Matthew Desmond | | | |
| Time | Advanced LIHTC | Property Management | Development | Special Focus |
| 10:30-11:30 | <p>Year 15 Exit Strategies</p> <p>Practical Guidance and Advice on Strategies, Workouts & Refinancing for Low Income Housing Tax Credit Developments approaching Year 15.</p> <p><u>Panelists:</u> Omar Chaudry, Hunt Capital Partners; Bob Davidson, Zimmerman Properties, LLC; Garrick Gibson, Tidwell Group; & Shane Deaver, Kutak Rock <u>Moderator:</u> Darrell Beavers, OHFA</p> | <p>Required Fair Housing Training for Management Companies</p> <p>Management firms can complete the required training for 2019 LIHTC management experience during this day long course. OHFA will require a minimum of 2 persons from each firm complete the required training.</p> <p><u>Presenters:</u> Mark English, E&A Team, & Scott Moore, Attorney</p> | <p>Workforce Development: Building Your Future Workforce</p> <p>The Oklahoma Office of Workforce Development discusses how to develop a pipeline of employees.</p> <p><u>Presenter:</u> Jenna Morey, OK Office of Workforce Development</p> | <p>The Nuts & Bolts of Communications & Marketing</p> <p>Communications and marketing experts provide attendees with a strong foundation to build a marketing plan and reach the right audience.</p> <p><u>Panelists:</u> Kinsey Crocker, The Homeless Alliance; Holley Mangham, OHFA; & Tracey Zeeck, Bumbershoot PR <u>Moderator:</u> Molly Fleming, The Journal Record</p> |
| 11:30-1:00 | Lunch & General Session: Federal Legislative Update Josh Yurek, Midwest Housing Equity Group; Garth Rieman, National Council of State Housing Agencies; & Tori Bourret, National Low Income Housing Coalition | | | |
| 1:00-2:00 | <p>2018 Required Changes to Operating and Partnership Agreements</p> <p>Gain an understanding of the impact of tax reform as it relates to LIHTC Operating and Partnership Agreements.</p> <p><u>Presenters:</u> Shane Deaver, Kutak Rock, & Garrick Gibson, Tidwell Group</p> | <p>Required Fair Housing Training for Management Companies continued...</p> | <p>Opportunity Zones</p> <p>Opportunity Zones, a new community development tool authorized in the 2017 tax reform bill, encourages investment in high-poverty neighborhoods through favorable capital gains treatment and other incentives. Experts explain the new program, eligible investments, and how it could be used with the Housing Credit.</p> <p><u>Presenters:</u> Nancy Morton & Justin Rumer, Dauby O'Connor & Zaleski</p> | <p>Oklahoma Affordable Housing Act</p> <p>Learn the history of the Oklahoma Affordable Housing Act, the impact on low income housing and the economic impact for the state.</p> <p><u>Panelists:</u> TBD <u>Moderator:</u> Scott Nixon, Sugar Creek Capital</p> |

*Please note that sessions and speakers are subject to change and will updated periodically.

| | | | | |
|-----------|--|---|---|--|
| 2:00-2:15 | Break & Exhibitor Fair <i>*Note: Break will be held in room between 2:00-2:30 p.m.</i> | | | |
| 2:15-3:15 | Equity & Debt Forum Industry experts on Oklahoman lending and syndication discuss 2018 debt and equity market activity and offer their perspectives on the LIHTC market. <u>Panelists:</u> Lisa Albers, Bank of Oklahoma; James Dunton, Raymond James; Janet Latimer, Horizon Bank; & John Wiechmann, Midwest Housing Equity Group <u>Moderator:</u> TBD | Required Fair Housing Training for Management Companies continued... | OHFA Rehab Standards Contract inspectors discuss OHFA Rehab Standards and requirements for HUD programs. <u>Panelists:</u> Cameron Dozier, Northeast Oklahoma Community Action Agency; Bill Fulmer, Neighborhood Housing Services Oklahoma; Christi McCullough, Muskogee County Community Action Foundation, Inc.; & Mike Viseur, Program Management Group <u>Moderator:</u> Chevelle Galbreath, OHFA | Challenges and Opportunities in Rural Historic Tax Credit Developments An expert panel discusses the challenges and opportunities found in building affordable housing projects that are both historic and located in rural areas. Case studies on the Hotel Bell in Alva and Oakland Flats in Oakland will give unique perspectives from the viewpoint of architects, contractors and historic consultants. <u>Panelists:</u> Catherine Montgomery, Preservation & Design Studio; Steve Ortloff, LW Construction; & Beth Windel, Southern Design Group <u>Moderator:</u> Kay Decker, Northwestern Oklahoma State University |
| 3:15-3:30 | Break & Exhibitor Fair <i>Exhibitor Fair ends at 3:30</i> | | | |
| 3:30-4:30 | Casualty Losses and Ability to Claim Tax Credits Explore the ramifications of casualty losses and claiming credits during the period units are out of service due to a casualty event. <u>Panelists:</u> Mike Celkis, CohnReznick; <i>additional panelists TBD</i> <u>Moderator:</u> TBD | Required Fair Housing Training for Management Companies continued... <u>*Session ends at 4:00 p.m.*</u> | UPCS Training National trainers from US Inspection Group give a brief overview of the requirements of the Uniform Physical Condition Standards, which are used for REAC inspections as well as HOME, LIHTC and NHTF. <u>Presenter:</u> Dennis Guyton, US Inspection Group | Advocacy in Action State and federal advocacy experts discuss best practices on outreach to stakeholders and policy makers as well as provide insight on current housing issues. <u>Presenters:</u> Tori Bourret, National Low Income Housing Coalition, & Bailey Perkins, OK Policy Institute |

**Please note that sessions and speakers are subject to change and will updated periodically.*