

Affordable Housing: Putting the  
Pieces Together  
**2013 National Housing Symposium**

November 8, 2013  
Washington, DC



## 2013 National Housing Symposium Affordable Housing: Putting the Pieces Together

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Time	Topic	Presenters
8:30 - 9:00	<b>Registration and Continental Breakfast</b>	
9:00	<b>Welcome and Introductions</b>	<b>Opening Remarks</b> <ul style="list-style-type: none"><li>○ Sharon Wilson Géno, Ballard Spahr</li></ul>
9:15 - 10:15	<b>Session One</b> Heard on the Hill	<b>Moderator</b> <ul style="list-style-type: none"><li>○ Sharon Wilson Géno, Ballard Spahr</li></ul> <b>Panelists</b> <ul style="list-style-type: none"><li>○ Thom Amdur, National Housing &amp; Rehabilitation Association</li><li>○ Chris Estes, National Housing Conference</li><li>○ Bernard B. Fulton III, U.S. Department of Housing and Urban Development</li><li>○ Charla G. Ouertatani, U.S. House of Representatives, House Financial Services Committee</li><li>○ Nicholas Wyatt, U.S. Senate Committee on Finance</li></ul>
10:15 - 10:30	<b>Break</b>	
10:30 - 12:00	<b>Session Two</b> Integrating the Fair Housing Piece of the Puzzle	<b>Moderator</b> <ul style="list-style-type: none"><li>○ Michael W. Skojec, Ballard Spahr</li></ul> <b>Panelists</b> <ul style="list-style-type: none"><li>○ Robert E. Hazelton, Dominion Due Diligence Group</li><li>○ Scott A. Marks, Coats   Rose</li><li>○ Richard Meyer, Freddie Mac</li></ul>
12:00 - 12:30	<b>Lunch and Networking</b>	
12:30 - 1:00	<b>Keynote Presentation</b> Perspective on GSE Reform	<ul style="list-style-type: none"><li>○ Barry Zigas, Bipartisan Policy Center's Housing Commission</li></ul>

# Agenda

Time	Topic	Presenters
1:00 - 2:30	<b>Session Three</b> Utilizing the Most Recent HUD Programs in Your Affordable Housing Puzzle	<b>Moderators</b> <ul style="list-style-type: none"><li>○ Mitzie V. Smith-Mack, Ballard Spahr</li><li>○ Rania S. Arja, Ballard Spahr</li></ul> <b>Panelists</b> <ul style="list-style-type: none"><li>○ Peter F. Engel, Housing Authority of Baltimore City</li><li>○ Ava J. Goldman, The Michaels Development Company</li><li>○ David Lacki, Lancaster Pollard</li><li>○ Margaret S. Salazar, U.S. Department of Housing and Urban Development</li><li>○ Denise Troeschel, Love Funding</li></ul>
2:30 - 2:45	<b>Break</b>	
2:45 - 4:00	<b>Session Four</b> Solving the Investment and Funding Gaps Puzzle	<b>Moderator</b> <ul style="list-style-type: none"><li>○ Mark J. Maichel, Ballard Spahr</li></ul> <b>Panelists</b> <ul style="list-style-type: none"><li>○ John Nunnery, PNC Bank</li><li>○ Jeff J. Englund, Greystone Servicing Corporation</li><li>○ Brian Kimes, Affordable Equity Partners</li><li>○ Carl Wise, Hunt Capital</li></ul>
4:00	<b>Closing</b>	<ul style="list-style-type: none"><li>○ Ryan R. Warburton, Ballard Spahr</li></ul>
4:00 - 6:00	<b>Reception</b> Meet and Greet with Industry Leaders	

Faculty

## Faculty

### **Thom Amdur**

Executive Director  
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Rehabilitation Association  
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Thom Amdur joined National Housing & Rehabilitation in 2004 and currently serves as its Executive Director, where he directs the association's day-to-day operations, including legislative and regulatory advocacy, committee activities, conferences and events, publications, and strategic planning. Mr. Amdur is also the creator of NH&RA's Preservation through Energy Efficiency Project, a major educational initiative supported by the John D. and Catherine T. MacArthur Foundation. He is a frequent speaker at affordable housing, sustainable development, and tax credit industry events and has been published in a variety of industry journals, including *Tax Credit Advisor*, *Independent Banker*, and the *Novogradac Journal of Tax Credit Housing*.

Mr. Amdur also serves as the Associate Publisher of *Tax Credit Advisor*, a monthly magazine for tax credit and affordable housing professionals, and is an Executive Vice President at Dworbell Inc., a boutique association management and communications firm in Washington, D.C. He was previously employed at a national lobbying firm focusing on financial services and technology issues.

Before moving to Washington, Mr. Amdur worked in media relations in the New York State Assembly and as a research assistant for New Hampshire Governor Jeanne Shaheen. He graduated *magna cum laude* from Tufts University with a double major in political science and history.

### **Rania S. Arja**

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Rania S. Arja represents mortgage lenders in all facets of commercial real estate financing, with an emphasis on multifamily project loans insured by the Federal Housing Administration.

Ms. Arja reviews lender title policies and surveys, land record documents, covenants, easements, conditions and restrictions, and planned-use development agreements. She also drafts loan documents and security instruments for construction, acquisition, and refinancing loans utilizing various financing structures, including Government National Mortgage Association securities, Section 8 properties, and tax-exempt financing.

Before entering private practice, Ms. Arja served a clerkship with the Offices of the Orange County (Calif.) Public Defender, where she wrote legal case summaries, reviewed witness statements, and completed extensive case law research on gang-related cases.

# Faculty

## **Peter F. Engel**

Housing Authority of Baltimore  
City  
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Peter F. Engel is the Deputy Commissioner for Project Finance and Development at Baltimore Housing. In this capacity he is responsible for major residential and mixed-use development projects involving affordable and public housing. Mr. Engel also oversees the City's HOME and other multifamily lending programs. Ongoing development work includes thousands of units, with a total cost of over \$1 billion.

Prior to his work at Baltimore Housing, Mr. Engel developed mixed-income housing for the Housing Opportunities Commission of Montgomery County Maryland, and supervised all multifamily housing programs for the Maryland Department of Housing and Community Development. He is a graduate of The Johns Hopkins University and Harvard Law School.

## **Chris Estes**

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Chris Estes became President and CEO of the National Housing Conference in 2012. He leads NHC's policy and advocacy work both in Washington and throughout the country. Mr. Estes came to NHC after nine years as Executive Director of the North Carolina Housing Coalition, one of the nation's best-known state housing groups. While Mr. Estes served with the coalition, the group worked to pass important consumer protections in manufactured housing and legislation that created important foreclosure prevention programs, brought changes to the way LIHTC developments are valued in terms of property taxes, and added affordable housing to the state's Fair Housing Act to make it more difficult to defeat affordable housing developments at the local level. On the national level, the coalition advocated for funding for the HUD and USADA housing program, Section 8 voucher reform, the creation and funding of the National Housing Trust Fund, and changes to the LIHTC program to stabilize the program.

Mr. Estes graduated from the University of North Carolina at Chapel Hill, where he double-majored in economics and industrial relations. He also holds two master's degrees from UNC-Chapel Hill: one from the School of Social Work with a concentration in community practice, and the other from the Department of City & Regional Planning with a concentration in housing and community development.

Prior to his work with the coalition, Mr. Estes worked for CAHEC, a regional tax-credit equity syndicator, and DHIC, a nonprofit affordable housing developer in Raleigh, as well as several other area nonprofits as a

resource development officer. He also served on the board of United Way of N.C., N.C. Assets Alliance, and the N.C. Community Reinvestment Association.

## **Jeff J. Englund**

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Jeff J. Englund joined Greystone in 2005 to establish a dedicated affordable housing team focused solely on low-income housing tax credit, tax-exempt bond, and other affordable multifamily products designed to preserve multifamily affordable housing nationwide. Mr. Englund has over 15 years' experience in the affordable housing industry and previously worked with MMA Financials' construction lending, tax credit syndication, and agency lending platforms prior to joining Greystone. He has an in-depth understanding of affordable housing finance and successfully analyzed and structured more than \$1 billion in multifamily affordable housing loans. In his current role, he leads Greystone's Affordable Housing lending platform that includes Fannie Mae, Freddie Mac, FHA, and other non-agency executions.

## **Sharon Wilson Géno**

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Sharon Wilson Géno is a partner in Ballard Spahr's Real Estate Department and a member of the firm's Housing Group. She focuses her practice on affordable-housing and real estate transactions, legislative advocacy, general corporate and nonprofit organizations, and administrative law. She has represented housing authorities on HOPE VI and mixed-finance transactions, administrative and regulatory issues, the Moving to Work Program, and the borrowing of private monies secured by a pledge of Public Housing Capital Funds. She has spent a considerable amount of time engaged in legislative advocacy on behalf of public housing authorities and other affordable-housing interests.

Before joining Ballard Spahr, Ms. Géno practiced in a Washington, D.C., law firm focused on affordable and public housing and nonprofits. She has also been a housing and community development consultant, assisting local governments, housing authorities, private companies, property managers, nonprofits, and other entities on affordable housing and community development issues, including projects involving CDBG, HOME, UDAG, and Section 108 funds; privately owned, federally assisted properties; and other federal, state, and local programs.

## Faculty

### **Ava J. Goldman**

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Ava J. Goldman is President of the Michaels Development Company, one of the nation's leading privately held affordable and mixed-income housing developers, having produced, since 1973, more than \$3 billion of residential assets across 33 states, the District of Columbia, and the U.S. Virgin Islands. She provides guidance and direction to a team of 60 professionals developing, at any given time, 50+ new and revitalized communities.

Before being named President in December 2012, Ms. Goldman served as Senior Vice President at Michaels, and in that capacity developed more than 3,000 residential units valued at almost \$600 million. In partnership with local public housing authorities, she and her staff developed HOPE VI and other mixed-finance communities in cities as diverse as Kansas City, Missouri; Camden, Newark, and Jersey City, New Jersey; New Haven, Connecticut; Meridian, Mississippi; and Honolulu, Hawaii. The new homes and apartments in these communities cater to renters and homeowners with a wide range of incomes.

Housing preservation and the acquisition and rehabilitation of existing affordable rental developments have been a specialty since Ms. Goldman joined the Michaels Organization in 1992. She has supervised the preservation of federally assisted rental developments in such states as Texas, California, Florida, Louisiana, New Jersey, Oklahoma, Kansas, and Virginia.

Before joining the Michaels Organization, Ms. Goldman was the head of the Atlantic County Department of Regional Planning and Development in Atlantic City, New Jersey. Earlier in her career, she served as Director of Housing and Redevelopment for the Atlantic County Improvement Authority. Ms. Goldman began her career in community redevelopment in 1979, as a Senior Planner for the Atlantic County Division of Planning.

### **Robert E. Hazelton**

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Robert E. Hazelton is President of Dominion Due Diligence Group (D3G). He is a graduate of Bucknell University, and has vast experience with multifamily housing construction, design, cost estimation, energy conservation, and environmental issues. He has worked for real-estate due diligence firms in Boston, New York, and Richmond. D3G, founded in 1994 by Mr. Hazelton, focuses on due diligence inspections for affordable housing and health care properties financed through FHA mortgage insurance programs and Low Income Housing Tax Credits (LIHTCs). Mr.



## Faculty

Hazelton has worked in all 50 states, with every HUD office in the nation, and with the majority of State Finance Housing Agencies. He is an active member of the five HUD-MAP Lender regional associations; a member of the MBA, NLHA, NCSHA, USGBC and HAG; and a founding member of the National Engineering and Environmental Due Diligence Association (NEEDDA).

### **Brian H. Kimes**

Affordable Equity Partners, Inc.  
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Brian H. Kimes, Director of Acquisitions/Underwriting for Affordable Equity Partners, Inc. (AEP), helps originate investment opportunities and manages key developer and investor relationships that AEP maintains throughout the nation. His responsibilities include the analysis of acquisition pricing, pre-acquisition due diligence, and underwriting. Mr. Kimes is also engaged in the execution of lower-tier investment closings, as well as structuring upper-tier investment funds, both from a modeling and an asset allocation prospective.

Mr. Kimes has been with AEP since 2000. He previously worked for Wells Fargo Bank and was involved in loan origination. He currently serves on the board of the Georgia Affordable Housing Coalition, and is a member of the Missouri Historic Preservation Society, the Texas Affiliation of Affordable Housing Providers, and the National Council of State Housing Agency.

Mr. Kimes has a B.S.B.A. in finance and real estate from the University of Missouri. He is active with the United Way and the Multiple Sclerosis Foundation, and is involved with the College of Business at the University of Missouri as a member of the Herbert J. Davenport Society.

### **David Lacki**

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David Lacki is the Managing Director of Affordable Housing with Lancaster Pollard, a financial services firm based in Columbus, Ohio, that specializes in providing capital funding to the health care, senior-living and affordable housing sectors. In addition to underwriting tax-exempt and taxable bond offerings, Lancaster Pollard provides organizations a complete range of funding options through its Fannie Mae/FHA/GNMA/ USDA-approved mortgage lender subsidiary. Mr. Lacki leads the firm's national effort to expand its investment banking and mortgage banking finance activities for income-restricted and subsidized rental properties.

Mr. Lacki has served as the investment banker, mortgage banker, or financial adviser to virtually every type of tax-exempt issuer in the housing market, including state-housing finance agencies, public-housing authorities, and developers. In the past 10 years, Mr. Lacki has structured and negotiated in excess of \$1.4 billion of multifamily financings in 120 transactions using bond structures and enhancements relying on virtually all current bond structures and enhancements, including total-return swaps; FHA/HUD, Fannie Mae, Freddie Mac, Federal Home Loan Bank, Standard & Poor's, and Moody's Affordable Housing Programs; senior/subordinated issues; pooled financings; and institutional private placements, among others.

Mr. Lacki holds registered securities representative (Series 7 and Series 63) licenses. He holds a Bachelor of Science degree in computer science from Daemen College in Amherst, N.Y., and received his MBA from California State University, Hayward. Before joining Lancaster Pollard, Mr. Lacki held the following positions: RBC Capital Markets, Director; Green Park Financial (now Walker Dunlop), Senior Vice President; CharterMac Mortgage Capital (now Centerline Capital Group), Senior Vice President; Capri Capital, Managing Director; Washington Capital, Senior Vice President; York Associates, loan underwriter; and JM Jayson & Co, acquisitions officer.

**Mark J. Maichel**

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Mark J. Maichel focuses on providing tax advice to investors and syndicators who invest in real estate projects that generate federal and state income tax credits, including affordable housing properties developed with low-income housing tax credits and historic buildings renovated with historic rehabilitation tax credits. Mr. Maichel frequently provides tax advice to investors and community development entities in connection with investments in and loans to qualified active low-income community businesses that generate federal New Markets Tax Credits.

On the energy front, Mr. Maichel has counseled clients on tax matters relating to federal energy investment tax credits for the use of solar and other renewable energy equipment in projects and federal production tax credits for the development of renewable electricity production facilities. He has also assisted clients in successfully applying for federal advanced energy project credits to equip or expand manufacturing facilities for the production of renewable energy technologies.

## Faculty

Mr. Maichel routinely represents tax-exempt entities, such as charitable organizations, social welfare organizations, and business leagues, regarding their formation, qualification for and maintenance of tax-exempt status, and mergers.

### **Scott A. Marks**

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Scott A. Marks is a Director in the Affordable Housing section of Coats Rose. He joined the firm's Austin office in October 2006, and has more than 15 years of experience representing developers of affordable housing.

Mr. Marks served as General Counsel of a real estate development firm and closed partnerships financed with Section 42 Housing Tax Credits and loans financed by conventional and governmental lenders. He has also represented many governmental clients, including one of the nation's largest housing authorities. In the late '90s, he assisted the Chicago Housing Authority with redeveloping the Cabrini-Green public housing high-rise towers into mixed-finance properties.

His housing authority and business experience can provide insights on strategy and assist with negotiation of partnership agreements, loan documents, and alternative financing arrangements. Mr. Marks has successfully closed financing for many supportive housing developments and for historic tax credit developments. He also has fair housing experience, including obtaining desegregation court approvals for affordable housing development plans. His government advocacy work has led to successful appeals and rule changes by the Texas Department of Housing and Community Affairs. Mr. Marks has also successfully advised clients on year-15 exit strategy for housing tax credit developments.

### **Richard A. Meyer**

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Mr. Meyer works in Multifamily Credit Risk Management. He is responsible for managing physical risk issues, which involves understanding, communicating, and mitigating risks associated with property condition, construction, and environmental issues affecting the Multifamily loan portfolio and mortgage purchase business. Mr. Meyer also manages multifamily loan loss reserves.

Mr. Meyer has been with Freddie Mac for 22 years. He is a registered architect and a member of the American Institute of Architects. His background includes a degree in architecture from the University of Notre Dame, an MBA from George Washington University, and professional

## Faculty

experience in the fields of architecture and real estate development as well as in finance.

### **Margaret S. Salazar**

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Margaret Solle Salazar is the Associate Deputy Assistant Secretary of the Office of Affordable Housing Preservation at the U.S. Department of Housing and Urban Development in Washington, D.C. She oversees programs to recapitalize and preserve affordable rental housing and advance energy efficiency of multifamily properties through the Mark-to-Market program and the Department's new Rental Assistance Demonstration, among other programs.

Ms. Salazar spearheads HUD preservation policy efforts related to expiring use and maturing HUD properties. She joined HUD Headquarters from the San Francisco Multifamily Hub, where she served as Chief of Insured Production and oversaw the development, refinance, and substantial rehab of hundreds of multifamily homes with FHA multifamily mortgage insurance programs. A former Presidential Management Fellow and a graduate of UC-Berkeley's Goldman School of Public Policy, Ms. Salazar began her career working on affordable housing, social justice, and economic development issues with state and local government agencies and community-based nonprofits in Northern California.

### **Michael W. Skojec**

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Michael W. Skojec concentrates on representing owners, developers, contractors, lenders, management companies, and other firms in a wide variety of advisory and contested matters. His practice is focused on real estate, fair housing, and disabled accessibility matters, including: housing discrimination defense; defense of housing accessibility claims; advice on compliance with accessibility laws including the Americans with Disabilities Act (ADA); defense of ADA claims; advice on Rehabilitation Act and UFAS compliance; claims against design professionals; and insurance coverage advice

Mr. Skojec is a member of the American Bar Association, Litigation and Construction Law Sections, and the Maryland State Bar Association, where he is the former Chair of the Construction Law Section. He is a Fellow of the Maryland Bar Foundation and a board member of both the Baltimore Courthouse and Law Museum Foundation and the Columbia Downtown

Housing Corporation, a nonprofit authorized by the Howard County Council to provide affordable housing in downtown Columbia, Maryland.

Mr. Skojec previously acted as an instructor at the University of Maryland School of Law's Cardin Program, teaching housing- and litigation-related matters. He has guest lectured at George Washington University Law School, the University of Maryland Graduate Program in Real Estate Development, and various legal assistant degree programs. Mr. Skojec has regularly spoken on fair housing, accessibility, and construction law matters for the National Multi-Housing Council, the National Apartment Association, design professionals, and other industry organizations. He is also a chapter author for the *Maryland Construction Law Deskbook*.

### **Mitzie V. Smith-Mack**

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Mitzie V. Smith-Mack is an experienced real estate and housing attorney. Before joining Ballard Spahr, she spent almost a decade in roles of increasing responsibility with the District of Columbia Housing Authority (DCHA), Office of General Counsel, most recently as Acting General Counsel.

She held the position of senior counsel for real estate, where she provided lead legal advice on HOPE VI redevelopment grant projects and mixed-finance development transactions. These mixed-finance transactions included residential and commercial components creating mixed-income communities (rental and home ownership) as well as elderly housing opportunities.

Also at DCHA, Ms. Smith-Mack drafted and negotiated development agreements, commercial and residential leases, covenants and deeds, loan and grant documents for public and private funds, operating agreements, and bond and tax credit documents for financing of affordable housing redevelopment. Most recently, she served as Acting General Counsel.

Ms. Smith-Mack is a member of the Board of Directors of the Housing and Development Law Institute (HDLI), a nonprofit legal resource for the affordable and public housing industry. She is also a member of the ULI Leadership Program's Inaugural Class (2011-2012). In September 2010, the National Alliance of Resident Services in Affordable and Assisted Housing (NAR-SAAH) recognized her pro bono work with its Corporate Partner of the Year Award.

## Faculty

### **Denise Troeschel**

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Denise Troeschel joined Love Funding in 2007 and now serves as Senior Vice President and chief underwriter. She is responsible for managing the multifamily transactions as well as training, lender compliance, and quality control. Ms. Troeschel also oversees the entire FHA underwriting and processing staff for all Love Funding offices, and is responsible for the continued controlled expansion of the FHA underwriting department. She carries more than three decades of experience in the mortgage and banking industry, serving in underwriting, servicing, and asset management roles. Ms. Troeschel is an instructor with the Mortgage Bankers Association of America, and is a frequent speaker at industry events and conferences.

Before joining Love Funding, Ms. Troeschel worked with Deutsche Bank Berkshire Mortgage, KeyBank, and the National Cooperative Bank. She holds a Bachelor of Science degree in psychology from Bowie State University. She is actively involved in the community, volunteering with the Girl Scouts for the past 26 years. She served two terms on the Board of Directors of the Girl Scout Council of the Nation's Capital and currently serves as troop leader for over 50 girls with cognitive disabilities.

### **Ryan R. Warburton**

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Ryan R. Warburton is Team Leader of the firm's Housing Bonds Team. He focuses on municipal finance, with emphasis on tax-exempt private activity bonds, including housing, 501(c)(3), and manufacturing facilities.

Mr. Warburton has extensive experience with mortgage revenue bonds and multifamily residential rental bonds and has served as counsel in charter school financings, capital grant funding securitizations, and Low Income Housing Tax Credits financings. His experience includes financings with variable-rate debt, and various types of credit-enhancement and derivative products.

Mr. Warburton has served as counsel to practically all sides and parties involved in public finance transactions and has represented these parties in numerous workouts and restructurings. As bond counsel, he has assisted one client in bringing more than \$1.8 billion of capital via tax-exempt and taxable bonds to its state to finance over 12,600 single-family residences for families of low or moderate income. Mr. Warburton has also been instrumental in structuring and documenting a financing program for another client that has provided for the financing of rental housing for low- and moderate-income people across the United States. He has represented this client on over 50 transactions in approximately 15

different states aggregating approximately \$540 million of financing for such rental housing projects.

Mr. Warburton is a member of the National Association of Bond Lawyers, American Bar Association, and Utah State Bar Association. He has lectured at municipal and bond association conferences on issues related to tax-exempt financings.

Mr. Warburton has volunteered his time as a scoutmaster and cubmaster in Boy Scouts of America. He has volunteered for the Future Business Leaders of America and is a past chair of his office's United Way campaign. He is active in his local church, where he has served in multiple leadership positions and provides volunteer service to his community.

### **Carl Wise**

Hunt Capital Partners  
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Carl Wise has over 25 years of experience in affordable housing both as an investor and working to structure investment funds and raise investor equity. Mr. Wise is Senior Vice President – Affordable Housing for Hunt Companies, Inc., where he is responsible for structuring investments and raising equity for Hunt Capital Partner's multi-investor syndication platform as well as structuring and placing proprietary investments with select corporate investors. Mr. Wise also served for 10 years as Senior Vice President with Alliant Capital and for 12 years as Senior Managing Director for DaimlerChrysler Capital Services, where he was responsible for real estate lending activities as well as equity investments in income-producing properties and in affordable housing funds and properties. He also previously served as a Vice President and as a member of the Board of Directors for the Affordable Housing Investors Counsel and practiced real estate law in New York City with Emmet, Marvin & Martin and Stroock & Stroock & Lavan.

Mr. Wise is a graduate of the University of Massachusetts and New York Law School. He is a member of the bar in New York and Connecticut.

### **Nicholas Wyatt**

U.S. Senate Committee on  
Finance  
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Nicholas Wyatt serves as Tax and Nominations Professional Staff Member on the Republican staff of the U.S. Senate Finance Committee. In this role, Mr. Wyatt is responsible for the vetting of all presidential nominees referred to the Finance Committee, as well as for advising Ranking Member Hatch on many tax issues, including the Highway and Airport and Airway trust funds. He has been with the Finance Committee since

### **Barry Zigas**

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early 2005. A native of Rockford, Illinois, Mr. Wyatt has a degree in economics from the University of Rochester and a Master of Public Policy degree from Georgetown University.

Barry Zigas became Director of Housing for the Consumer Federation of America in 2008. He is responsible for CFA's policies on housing and mortgage finance, including secondary-market systems, foreclosure and loan modification policies, and community reinvestment issues. He also consults with housing and community development nonprofits and foundations on strategy, innovation, and leadership through his firm Zigas and Associates LLC.

Mr. Zigas was Senior Vice President at Fannie Mae from 1995 to 2006, leading the company's single-family community lending initiatives, as well as corporate and regulatory reporting on the company's housing goals, investments in CDFIs, and support for homeownership counseling and education. He joined Fannie Mae in 1993 as Vice President for Housing Impact.

Mr. Zigas served as President of the National Low Income Housing Coalition from 1984 to 1993, where he led the efforts to create the Low Income Housing Tax Credit and the HOME program, and expanded responsibilities for community lending at Fannie and Freddie. He also served as Associate Executive Director and other staff positions at the U.S. Conference of Mayors from 1976 to 1984. He is a Phi Beta Kappa graduate of Grinnell College, from which he also received an Alumni Award in 2012, and a 1997 graduate of the Wharton School's Advanced Management Program.

Mr. Zigas serves as Chairman of the Board of Mercy Housing, Inc., and as a Director of the Low Income Investment Fund (LIIF), the National Housing Conference, and the Avalon Theater Project, a neighborhood-supported nonprofit movie theater in Washington, D.C. He was appointed to the Bipartisan Policy Center's Housing Commission in December 2011, and previously served on the Rouse-Maxwell Task Force and the Mitchell-Danforth Task Force in the 1980s. He is an active participant in the Mortgage Finance Working Group, sponsored by the Center for American Progress, as well as the foreclosure working group of Americans for Financial Reform (AFR). His articles and commentary have appeared in *American Prospect*, *American Banker*, *Washingtonian*, and other publications, and he is frequently quoted in print and electronic media.



## List of Attendees

# List of Attendees

<b>Last Name</b>	<b>First Name</b>	<b>Job Title</b>	<b>Company Name</b>
Abel	Larry		Housing Authority and Community Services Agency of Lane County
Abernathy	Brian	Executive Director	Philadelphia Redevelopment Authority
Aguda	Milagros	HOPE VI Grant Manager	U.S. Department of Housing and Urban Development
Ahmadian	Lance	Investment Associate	Greysteel
Alexander	Kimberley	Board Member	Mary's House for Older Adults
Allison	Emily	Managing Director	Duvernay & Brooks LLC
Amatya	Jateen		PNC Bank, NA
Amdur	Thom	Executive Director	National Housing & Rehabilitation Association
Anderson	Jessica	Executive Director	Rockville Housing Enterprises
Andrews	Jim	Chief Executive Manager	Access Andrews Consulting, LLC
Aniban	Fernando	Chief Financial Officer	Housing Authority of the City of Milwaukee
Anvar	Artin		Love Funding Corporation
Arja	Rania	Associate	Ballard Spahr LLP
Armiger	L. Earl	President	Orchard Development Corporation
Ashford	Ronald	Director, Public Housing Supportive Services	U.S. Department of Housing and Urban Development
Au	Kathryn	Presidential Management Fellow, Environmental Review Division	U.S. Department of Housing and Urban Development
Badger	Paul	President and CEO	The Badger Group
Badger	Janet	Senior Counsel	Housing Authority of Baltimore City
Bainum	Michael	Senior Development Manager	Enterprise Homes, Inc.
Bell	Christopher	Associate General Counsel	Fannie Mae
Belot-Pave	Irene	Counsel	Ally Financial Inc.
Bennett	Shirelle	Deputy Director	Howard County Housing and Community Development Board
Best	Michael	Principal	Cardinal Court Capital, LLC
Binion	Caster	Executive Director	Housing Authority of the City of Pittsburgh
Binitie	Buwa	Managing Partner	Dantes Partners
Bleser	Melissa	Associate	Ballard Spahr LLP
Blitzer	Mara		U.S. Department of Housing and Urban Development

# List of Attendees

Last Name	First Name	Job Title	Company Name
Bly	Belinda	Supervisory Public Housing Revitalization Specialist	U.S. Department of Housing and Urban Development
Boe	P. Nathaniel	Chief Development Officer	Housing Authority of the City of Pittsburgh
Bond	Charlie	Associate Development Director	Beatty Development Group
Bose	Gira	Senior Legislative and Policy Associate	National Council of State Housing Agencies
Boyd	Dana		U.S. Department of Housing and Urban Development
Brady	Terrance	Director of Energy Services and Special Projects	Tampa Housing Authority
Brandenburg	John	Vice President - Asset Management	Enterprise Community Investment, Inc.
Bray	Holly	Senior Director	Love Funding Corporation
Brennet	Jarrod	Housing Development Assistant	So Others Might Eat
Bressman	Hadley	Underwriter	Metropolitan Funding Corporation
Brooks	Keegan	Sr. Program Manager	Thomas & Herbert Consulting
Brown	Qwendolyn	Associate General Counsel	District of Columbia Housing Authority
Buchanan	Kathy	Customer Account Manager	Fannie Mae
Byrne	Gregory	Director, Financial Management Division	U.S. Department of Housing and Urban Development
Campanile	Roma	Architect	U.S. Department of Housing and Urban Development
Cooke	James	Partner	Ballard Spahr LLP
Carbo	Thomas	Executive Director	Howard County Department of Housing
Casey	Paul	Partner	Ballard Spahr LLP
Cavanaugh	Gordon		
Chapman	Hilary	Housing Program Manager	Metropolitan Washington Council of Governments
Chen	Peilin	Asst. Director, Policy & Administration	Philadelphia Redevelopment Authority
Clarke	John	Executive Director	New Brunswick Housing and Redevelopment Authority
Clarke	Charlene	Asset Manager	DC Housing Finance Agency
Clayton	Caroline	Choice Neighborhoods Team	U.S. Department of Housing and Urban Development
Coakley	Frank	Assistant Secretary	Maryland Department of Housing and Community Development
Cohen	Susan	General Counsel	Cambridge Housing Authority
Coile	Adam		SOME, Inc.

# List of Attendees

Last Name	First Name	Job Title	Company Name
Colon	Tim	Affordable Housing Specialist	U.S. Department of Housing and Urban Development
Cornick	Elaine	Team Leader	Maryland Department of Housing & Community Development
Cortiella	David	Program Coordinator	District of Columbia Housing Authority
Crow	Todd	Executive V.P. Real Estate Finance, Manager of Tax Credit Capital	PNC Bank, NA
Cullen	Sean	Director - Housing Capital Group	RBC Capital Markets
Darden	K. Miranda	Projects Planner	Arundel Community Development Services, Inc.
Davis	Stuart	Director	Fannie Mae
Davis	Clayton	Senior Director	Freddie Mac
Day-Marshall	Maria	General Counsel	District of Columbia Housing Finance Agency
Dean	Mark	Managing Director	Citi Community Capital
DeGaetano	Joseph	VP	Affordable Housing Partners, Inc.
DeLapenha	Monique	Partner	Ballard Spahr LLP
Dick	Michael	Director	Fannie Mae
Dickson	Bryan	Director	Citi Community Capital
Dotts	Phil	Managing Director	Public Financial Management
Doyle	Laurie	Vice President of Development	Real Estate Development Services, LLC
Drobenare	Neal	Vice President	The NHP Foundation
Ducey	John	Manager - Multifamily Affordable Housing-Credit	Fannie Mae
Dunn	Pamela		Montgomery County Planning Department
Duvert	Pascale	Attorney	
Earle	Nicole		Housing Authority for Baltimore City
Easley	Robert	Acting Deputy Director	Fairfax County Redevelopment & Housing Authority
Eaton	Christy	Executive Director	Home Aid Northern Virginia
Edson	Rick	President	Housing Capital Advisors, Inc.
Ellison	Ken	Senior Housing Advisor	SOME (So Others Might Eat)
Engel	Peter	Assistant Commissioner-Project Finance and Development	Housing Authority of Baltimore City
Englund	Jeff	Managing Director	Greystone Servicing Corporation, Inc.

# List of Attendees

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Estes	Chris	President and CEO	National Housing Conference
Evans	Naomi		Naomi Evans
Extein	Lynn	Director, Affordable Housing Group	Freddie Mac
Fadlelmola	Belinda	Senior Management Analyst	U.S. Department of Housing and Urban Development
Fallon	Frank	Managing Director	RBC Capital Markets
Fawzi	Amr	Director, Credit Risk Management	Fannie Mae
Fazio	Denise	Vice President	PNC Bank, NA
Fennell	Catherine		Urban Atlantic
Field	Mark		Freddie Mac
Fleming	Helena	Board of Director's	Mary's House for Older Adults
Flood	Kyle	Director, Community Development & Design	Philadelphia Housing Authority
Flores	Virginia	Housing Program Specialist	The Department of Housing & Urban Development
Folwell	Mary Grace	Associate	Ballard Spahr LLP
Fulton	Bernard	Deputy Assistant Secretary for Congressional Relations	U.S. Department of Housing and Urban Development
Furlong	Chris		City Interests
Gage	Brian	Senior Policy Advisor	Houston Housing Authority
Gale	Thomas	Vice President and Regional Manager	Lancaster Pollard & Company
Garner	Kevin	Housing Program Manager	HUD/FHA/Office of Multifamily Housing Programs
Gaughan	Michael		PNC Capital Markets
Gause	Phillip	Director	Arbor Commercial Mortgage, LLC
Geary Jones	Caitlin	Policy Associate	National Housing & Rehabilitation Association
Géno	Sharon	Partner	Ballard Spahr LLP
George	Mary Jo	Partner	Ballard Spahr LLP
Gest	David		Ballard Spahr LLP
Gilligan	Morgan	Vice President, Business Development Officer	Stewart Title
Glassman	Amy	Associate	Ballard Spahr LLP
Goldstein	Alan	Director, Multifamily Division	AHC Management, LLC

# List of Attendees

Last Name	First Name	Job Title	Company Name
Goslee	Jannai	General Counsel	Housing Authority of Baltimore City
Goslee	Jan		Housing Authority of Baltimore City
Graham	Nicole	Vice President	CSG Advisors
Grayson	Chickie	President & Chief Executive Officer	Enterprise Homes, Inc.
Green	Terry	President	Triad Housing Corporation
Greene	Michelle	Real Estate Development Manager	Housing Authority of Baltimore City
Greenspan	Tamar	Policy Advisor, Public and Affordable Housing	National Association of Housing and Redevelopment Officials
Grigsby	Donna	Community Development Manager	TD Bank
Grospe	Sylvia	VP Regulatory & Compliance Counsel	Carrington Mortgage Holdings, LLC
Grzywacz	Elizabeth	Senior Counsel - Real Estate	PNC Bank, NA
Guarnaccia	Teri	Partner	Ballard Spahr LLP
Handshy	Brian	Policy Analyst	U.S. Department of Housing and Urban Development
Hardy-Phillips	Yvonne		H & B Developers, LLC
Harris	Artie	Vice President of Real Estate	Montgomery Housing Partnership
Harrold	Scott	Associate	Lancaster Pollard
Harzinski	Maureen	Office of Landlord Tenant Affairs	Montgomery County Department of Housing and Community Affairs
Hazelton	Robert		Dominion Due Diligence Group
Henderson	John	PHRS - Grant Manager	HUD Office of Public Housing Investments
Henderson	Kimberly	Executive Director	Be The Change
Henson	Daniel	President	Henson Development Co.
Hobbs	Christine		
Hodges	Lisa	Senior Advisor	Oystertree Consulting, LLC
Hopkins	Duane	Chief Financial Officer	Fort Collins Housing Authority
Horton	Steven	Executive Director	New Rochelle Municipal Housing Authority
Hsiao	Michelle		Fannie Mae
Hurst	Edmond	Senior Managing Director	Crews & Associates, Inc.
Iloanya	David	Director of Real Estate Development	Tampa Housing Authority

# List of Attendees

Last Name	First Name	Job Title	Company Name
Jackson	Joanne	VP	SLM Financial
Jayachandran	Priya	Senior Vice President	Bank of America Merrill Lynch
Johnson	Gregory	Project Manager	DC Revenue Bond-Enterprise Zone Program
Johnson	Debbie	VP Compliance	Citi
Johnson	Dawn		
Johnston	Robert	Senior Vice President, Acquisitions	Affordable Housing Partners, Inc.
Joseph	Gerry	Principal	Joseph Development
Kaiser	Timothy	Executive Director	Public Housing Authorities Directors Association
Kane	Andrew	Managing Director/Senior Vice President / Public Finance	D. A. Davidson & Co.
Kauffmann	Ellen	Partner	Ballard Spahr LLP
Kelleher	Margo	Vice President, Development	Vesta Corporation
Kelly	Siobhan	Multifamily Credit Risk Officer	U.S. Department of Housing & Urban Development
Kimm	Terence	Principal	Cohn Reznick LLP
Kirschner	Eli	Attorney-Advisor	U.S. Department of Housing and Urban Development
Klein	Jennifer	Housing Counselor/Trainer	Housing Counseling Services
Knobbe	Craig	Of Counsel	Ballard Spahr LLP
Koczela	Jim	Chief Financial Officer	Boulder Housing Partners
La Branche	Mindy	Legislative and Policy Associate	National Council of State Housing Agencies
Lacki	David	Managing Director	Lancaster Pollard
Lapane	Lisa	Multifamily Asset Management	PNC Real Estate Finance
Lay	Marion	Analyst	Love Funding
Lazdins	Valdis		MNCPPC
Lee	Andrew		U.S. Department of Housing and Urban Development
Lee	Bakari	Partner	McManimon, Scotland & Baumann, LLC
Lee	Lori		Academy Mortgage Corporation
Leech	Spencer	Vice President/General Manager	Severn Construction Company, LLC
Leithead	Michael	Director of Real Estate Development	Dale Corporation

# List of Attendees

Last Name	First Name	Job Title	Company Name
Lett	Woullard	consultant	Lett Consulting
Lindsay	Kafi	Senior Counsel	Philadelphia Housing Authority
Lipsetz	David	Senior Policy Advisor	U.S. Department of Housing and Urban Development
Liu	Michael	Senior Vice President	Dutko Grayling
Lowder	Darin	Associate	Ballard Spahr LLP
Lurie Hoffman	Ellen		National Council of State Housing Agencies
Macias	Adrian		U.S. Department of Housing and Urban Development
Macleod	Brett	Vice President	JPMorgan Chase
Maichel	Mark	Of Counsel	Ballard Spahr LLP
Markel	William	Executive Vice President	Affordable Equity Partners, Inc.
Markham	Maureen		Arlington County
Marks	Scott		Coats Rose Yale Ryman & Lee, P.C.
Marsells	Roberta	Assistant Secretary	Housing Authority of the City of Milwaukee
Marshall	Sunaree	Program Analyst	U.S. Department of Housing and Urban Development
Marter	Linda		Law Offices of Nancy M. Rice
Mauk	Edward	Chief Financial Officer	Housing Authority of the City of Pittsburgh
Mauldin	Cara	Analyst	Love Funding Corporation
McClain	Amy	Partner	Ballard Spahr LLP
McCoy	Antwoine	Senior Financial Analyst	Thomas & Herbert Consulting LLC
McGuire	Carmel	Sr. Director, Multifamily and Affordable Housing Finance	National Association of Home Builders
McIlvaine	Helen	Deputy Director	City of Alexandria - Office of Housing
McMillan	Linda		Montgomery County Council
McPhail	Gregory	Sr. Program Manager	Thomas & Herbert Consulting LLC
McRae	Lynnette		U.S. Department of Housing and Urban Development
Melin	Melodee	Director	Quadel Consulting
Meyer	Richard		Freddie Mac
Meyers	Leslie	Senior Vice President	Bank of America Merrill Lynch



# List of Attendees

<b>Last Name</b>	<b>First Name</b>	<b>Job Title</b>	<b>Company Name</b>
Miller	Trisha	Senior Advisor	U.S. Department of Housing and Urban Development
Mills	Carol	Senior Vice President	Agency Advisors, Inc.
Montenegro	Rachel	Land Use Specialist	Ballard Spahr LLP
Moore	Tiwanda	Multifamily Underwriter	Maryland Department of Housing & Community Development
Morath	Amy		U.S. Department of Housing and Urban Development
Moreira-Smith	Zorayda	Manager, Affordable Housing, Community and Economic Development	CASA de Maryland
Morris	Grace	Director	CHC
Mortensen	Christina	Presidential Management Fellow	U.S. Department of Housing and Urban Development
Moses	Beverly	Housing Community Developer III	Fairfax County Department of Housing & Community Development
Mullen	John	Director	Greysteel
Mullin	Stephen	President & Principal	Econsult Solutions, Inc.
Murphy	LaShonia	Senior Mortgage-Backed Securities Specialist	Ginnie Mae
Mustapha	Madiana	Project Coordinator for Sustainable Financing	Economic Opportunity Studies, Inc.
Nackerman	Dan	Executive Director	Housing Authority of the County of San Bernardino
Nazzaro	Marianne		U.S. Department of Housing and Urban Development
Nelson	Richard	Director	Montgomery County Department of Housing and Community Affairs
Neumann	Kent	Financial Advisor	Eichner Norris & Neumann PLLC
Neuner	Tillman		Washington Regional Advocacy for Affordable Housing
Nigam	Aseem	Director, Real Estate Finance and Grants Management	Fairfax County Redevelopment & Housing Authority
Nix	Raymond	Managing Director	Urban Matters Development Partners
Noland	Robert	Grant Manager	U.S. Department of Housing and Urban Development
Norlander	Adam	Special Assistant	U.S. Department of Housing and Urban Development
Norris	R. Wade	Partner	Eichner Norris & Neumann PLLC
Nunnery	John	Senior Vice President, Regional Manager of Originations	PNC Bank, NA
O'Brien	Joy	Associate	Ballard Spahr LLP
O'Neill	Timothy	Managing Associate General Counsel	Freddie Mac
Osias	Tedi	Aide to Council Member Nancy Floreen	Montgomery County Council

# List of Attendees

<b>Last Name</b>	<b>First Name</b>	<b>Job Title</b>	<b>Company Name</b>
O'Sullivan	Ruth	Executive Director	Rockville Housing Enterprises
Paolisso	Paul	Originations Director	Arbor Commercial Mortgage, LLC
Paradise	Neil	Housing Program Specialist	U.S. Department of Housing and Urban Development
Parker	Norman	Of Counsel	Ballard Spahr LLP
Parker	Tracy		DC Housing Finance Agency
Parker	Leslie		Econsult Solutions
Parker	Carin		Freddie Mac- TAH Underwriting
Parris	Lori	Deputy General Counsel	District of Columbia Housing Authority
Paschal	Martha	Consultant	Malachite LLC
Patterson	Alan	President	CreditVest
Peace	Rebecca	Chief Counsel	Pennsylvania Housing Finance Agency
Petherick	Glenn	Editor	Tax Credit Advisor
Phillips	Denise	Grant Manager	U.S. Department of Housing and Urban Development
Poduska	Joseph	Public Housing Coordinator	National Leased Housing Association
Pogliani	Tina	Architect	Hord Coplan Macht
Polyzois	Stephanie	Senior Vice President	Alliant Capital
Porter	Marcie	Senior Managing Consultant	Public Financial Management, Inc.
Pouyes	Nydia	Associate	Ballard Spahr LLP
Powell	Andrea	Supervisory Counsel	District of Columbia Housing Authority
Powell	Johnette	Economic Development Program Specialist	D.C. Department of Housing and Community Development
Prickril	Lisa	Events Coordinator	Ballard Spahr LLP
Prince	Preston	Executive Director	Fresno Housing Authority
Propert	Christopher	Associate General Counsel	Freddie Mac
Randolph	Chaundi		U.S. Department of Housing and Urban Development
Redican	Larry	Deputy General Counsel	Philadelphia Housing Authority
Reed-Morton	LaDonna	Senior Advisor for PIH Budget and Financial Management	U.S. Department of Housing and Urban Development
Reichanadter	Tracey	Director National Business Development - Affordable Housing Industry	Cohn Reznick LLP

# List of Attendees

<b>Last Name</b>	<b>First Name</b>	<b>Job Title</b>	<b>Company Name</b>
Rhodes	William	Partner	Ballard Spahr LLP
Richardson	Lorraine	Senior Management Analyst	U.S. Department of Housing and Urban Development
Richardson	Keith	Managing Director	Philadelphia Housing Authority
Ricketts	Michael	Senior Development Director	Harbor East Development Group
Riveira	Noemi	Project Manager	Habitat for Humanity of Northern Virginia
Roberts	La Tonya	Housing Consultant	Thomas & Herbert Consulting
Rogers	Andrew	Associate	Ballard Spahr LLP
Roodman	Stephanie	Senior Project Manager / Legal Counsel	Montgomery Housing Partnership
Rowe	Paul		Paul Rowe & Associates
Rudnick	Nikki	Associate Director, Housing	Bipartisan Policy Center
Rudow	Steve	Senior Vice President	AGM Financial Services, Inc.
Ruiz	Roberto	Urban Planner, Research Manager	Montgomery County Planning MNCPPC
Russell	Sean	Principal	C&RES, Inc.
Salazar	Margaret	Acting Director, Office of Affordable Housing Preservation	U.S. Department of Housing and Urban Development
Sampson	Paula	Director	Fairfax County Department of Housing & Community Development
Sann	David	Director of Housing Development	St. Ambrose Housing Aid Center
Sarin	Amit		Office of Affordable Housing Preservation, HUD
Schwartz	Lisa	Senior Planning Specialist	Montgomery County Department of Housing and Community Affairs
Schwartz	Matthew	CEO	Greysteel
Sclafani	Salvatore	Senior Policy Analyst	U.S. Department of Housing and Urban Development
Seymour	Charles	Senior Vice President	Agency Advisors, Inc.
Shaff	Stephen	Founder	Community-Vision Partners
Shah	Anil		Freddie Mac
Shapiro-Cyr	Lila	Partner	Ballard Spahr LLP
Shattuck	Jeanie	Senior Policy Analyst	Enterprise Community Partners
Shepherd	Steven	Presidential Management Fellow	US Dept of Housing and Urban Development
Siegel	Peter	Owner	Landex Development, LLC

# List of Attendees

Last Name	First Name	Job Title	Company Name
Simmons	Andrew		Urban Development Consultant
Simms	Edward	Multifamily Underwriter	Maryland Department of Housing and Community Development
Sitanggang	Christian	Default Advisory Analyst	Nationstar Mortgage LLC
Skinner	Raymond	Secretary	Maryland Department of Housing and Community Development
Skojec	Michael	Partner	Ballard Spahr LLP
Smith	J. Paul	Vice President	Oak Grove Capital
Smith	William	Marketing Technology Specialist	Ballard Spahr LLP
Smith	Tiffany	Chief of Staff	Howard County Housing
Smith	Shaun	Senior Director, Targeted Affordable Production	Freddie Mac
Smith-Mack	Mitzie	Partner	Ballard Spahr LLP
Spadoni	Lindsay	Attorney-Advisor	U.S. Department of Housing and Urban Development
Spencer-Horsley	Audrey		MDHCD
Sprecher	Stephen	Housing Development Director	Volunteers of America
Srivatsa	Kalavathi	Manager - Compliance and Assurance	Altisource Business Solutions Private Ltd
Stern	Margo	Associate General Counsel	Freddie Mac
Talios	Diana	Housing Development Officer	Maryland Department of Housing and Community Development
Thomas	David	Deputy Executive Director, Operations	Philadelphia Redevelopment Authority
Thomas	LaToya	Director of Business Development & Communications	Wienczek + Associates Architects + Planners
Tolbert	Jamila	Redevelopment Planning Specialist	Thomas & Herbert Consulting
Tran	Phuc	Development Specialist	Jair Lynch Development Partners
Trent	Donna	Human Resources Generalist	Philadelphia Redevelopment Authority
Troeschel	Denise	Vice President/Deputy Chief Underwriter	Love Funding Corporation
Troup-Leighton	Charlotte	Business Development Executive	Chicago Title - DC NCS
Turner	Marvin	Director	HUD National Capitol Area Office
Waller	Michelle	General Counsel	Richmond Redevelopment & Housing Authority
Warburton	Ryan	Partner	Ballard Spahr LLP
Warner	Morris	Assistant Chief Asset Development & Preservation Officer	Newark Housing Authority

# List of Attendees

<b>Last Name</b>	<b>First Name</b>	<b>Job Title</b>	<b>Company Name</b>
Watson	Vicki	Assistant Director	National Community Development Association
Weaver	Elizabeth	Associate General Counsel	Freddie Mac
Weisner	Aron	Development Officer	Bellwether Enterprise Real Estate Capital, LLC
Wilbourn	Beverly	General Counsel	District of Columbia Housing Authority
Wilds	Karen	Executive Director	Newport News Redevelopment and Housing Authority
Wilhelm	Gary		Columbia Housing Authority
Williams	Owen	Vice President	Bellwether Enterprise Real Estate Capital, LLC
Williams	Risha	Senior Asset Manager	DC Housing Finance Agency
Winter	Michael	Deputy General Counsel	DC Housing Finance Agency
Wise	Carl	Senior Vice President	Hunt Capital Partners, LLC
Wittman	Kyle	Financial Analyst	AGM Financial Services, Inc.
Wright	Thomas	Director of Loan Guarantee	U.S. Department of Housing and Urban Development
Wyatt	Nick		U.S. Senate Finance Committee
Young	Shannia	Associate	Ballard Spahr LLP
Zavos	Bruce	Owner, Architect	Zavos Architecture & Design
Zegeye	Meti	Attorney-Advisor	U.S. Department of Housing and Urban Development
Zigas	Barry		Zigas & Associates, LLC
Zuniga	Jessica	Vice President	Conifer Realty, LLC

General Firm Information

# About Ballard Spahr

## About Ballard Spahr

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Ballard Spahr LLP is a national firm of more than 500 lawyers in 14 offices across the country. Our attorneys provide counseling and advocacy in more than 40 areas within intellectual property, litigation, business and finance, real estate, and public finance. We represent a diverse cross-section of clients, ranging from large public companies and privately held corporations to government agencies and nonprofit organizations. Our practices span the life sciences and technology, energy, health care, and other sectors that are driving innovation and growth in today's marketplace.

The firm's mission is straightforward: to provide nothing less than excellence in every legal representation. Our client focus is absolute. We help clients achieve success as they define it. We respect and anticipate their needs, take action to keep them informed, and devise forward-thinking solutions to get the most favorable results. This is Ballard Spahr's pledge.

### Practices

- Antitrust
- Bankruptcy
- Business and Finance
  - Bank Regulation and Supervision
  - Investment Management
  - M&A/Private Equity
  - Securities
  - Transactional Finance
- Consumer Financial Services
- Employee Benefits and Executive Compensation
- Environment and Natural Resources
- Family Wealth Management
- Franchise and Distribution
- Government Relations, Regulatory Affairs and Contracting
- Housing
- Intellectual Property
  - Patents
  - Trademarks and Copyrights
  - Trade Secrets
  - Entertainment and Media
  - Intellectual Property Litigation
- Labor and Employment
- Litigation
  - Appellate
  - Commercial Litigation
  - E-Discovery and Data Management

# About Ballard Spahr

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- Intellectual Property Litigation
- Product Liability and Mass Tort
- Professional Liability
- Real Estate and Construction Litigation
- Securities Enforcement and Litigation
- Mortgage Banking
- Municipal Securities Regulation and Enforcement
- P3/Infrastructure
- Privacy and Data Security
- Public Finance
- Real Estate
- Real Estate Development and Complex Transactions
  - Construction
  - Eminent Domain
  - Leasing
  - Mixed-Use Development and Condominiums
  - Real Estate Tax
  - Zoning and Land Use
- Real Estate Finance and Capital Markets
  - Commercial Loan Servicing
  - Distressed Real Estate
  - Private Equity Real Estate
- REITs
- Resort and Hotel
- Tax
  - Exempt Organizations
- Tax Credits
- Water Rights
- White Collar Defense/Internal Investigations

## Industries

- Energy and Project Finance
- Health Care
- Higher Education
- Insurance
- Life Sciences/Technology
- Sports

## Initiatives

- Climate Change and Sustainability
- Health Care Reform
- Korea
- Municipal Recovery



## Department / Practice Group Information

### Housing Group

With more than 70 attorneys, our housing practice is one of the largest in the country. We provide innovative and practical advice in the development and financing of housing and community development projects nationwide.

Our experience includes the representation of more than 75 housing authorities, the closing of hundreds of bond transactions as bond and underwriter's counsel, and involvement in thousands of tax-credit transactions. We routinely represent borrowers and more than a dozen lenders under all of the multifamily programs of Freddie Mac, Fannie Mae, and HUD.

We are called upon by clients engaged in the acquisition, development, expansion, and disposition of virtually every type of housing, including:

- Military housing
- Mixed-income/mixed-use housing
- Multifamily housing
- Planned communities/condominiums
- Senior/special needs housing
- Single-family housing
- Student housing
- Workforce housing

#### **A Team Approach to Complex Housing Issues**

Our experience in banking, securities, zoning, green building, litigation, and bankruptcy complements our housing practice. We have been engaged as bond counsel in billions of dollars in single family and multifamily housing revenue bonds. Our energy team is at the forefront of the green construction and retrofitting of buildings, and several of our lawyers hold the LEED AP designation.

Our finance lawyers provide pragmatic, leading-edge advice on even the most complex transactions, including:

## Department / Practice Group Information

- Acquisitions/assumptions
- Bonds
- Construction and bridge loans
- Capital grant financing programs
- Community development lending
- Defaults and workouts
- Green building/energy efficiency initiatives
- Fannie Mae/Freddie Mac
- FHA-insured loans/GNMA
- HOPE VI and other HUD programs
- Mixed finance
- Portfolio sales and acquisitions
- Section 8 contracts and vouchers
- Tax credits

We represent clients in every space in the market, including:

- Developers
- General contractors
- Government-sponsored enterprises
- Housing authorities
- Investors

## Department / Practice Group Information

- Lenders
- Loan servicers and asset managers
- Mortgage and investment bankers
- Municipal bond underwriters
- Nonprofit organizations
- Property managers
- Special servicers
- State and local housing finance agencies
- Syndicators

### **Public Housing**

We work with housing authorities nationwide, advising on the demolition, disposition, and development of public housing projects. Our work includes implementing HOPE VI projects, obtaining HUD regulatory waivers, structuring and closing transactions involving capital fund bonds, and private financings using various tax credits.

We have closed numerous affordable housing projects, including mixed-income units, mixed-use developments, and sustainable-energy improvements. Our attorneys assist clients in innovative transactions, combining public housing redevelopment with energy improvements, continuing care facilities, school construction, and transit-oriented development.

We also assist housing authorities with other programs, such as Moving to Work, Section 8 contracts, asset management, the Section 30 Public Housing Mortgage Program, and OIG investigations. Our lawyers have developed productive working relationships with HUD officials and have a solid understanding of their programs and procedures.

### **FHA-Insured Financing**

We represent private and public lenders, borrowers, and other clients nationwide, counseling on all aspects of HUD-insured financing transactions. Our work has included acquisition, rehabilitation, and new construction loans; tax-exempt bond financings credit enhanced by HUD insurance; Government National Mortgage Association mortgage-backed securities; IRP decoupling transactions; and transfer of physical assets applications. We are experienced in virtually all of HUD's multifamily programs and with the related tax, securities, environmental, and other legal issues associated with HUD transactions.

We also assist lenders in obtaining HUD mortgagee and MAP approvals to originate HUD-insured loans. We help lenders respond to audit reports, pre-penalty determinations, and other adverse findings and advise on servicing issues. We negotiate loan and servicing portfolio sales and perform due diligence reviews. Our lawyers enjoy effective working relationships with HUD headquarters and local office employees.

### **GSE-Related Financing**

We counsel lenders, borrowers, and other clients nationwide on all aspects of Fannie Mae and Freddie Mac financing products for multifamily housing projects and seniors facilities and on related compliance and servicing issues. Our attorneys handle all types of conventional mortgage and bond financings, including acquisition, rehabilitation, refunding, and forward commitment new construction loans. We also assist clients with loan assumptions, distressed asset advice, and default resolution. We represent Freddie Mac on an ongoing basis as counsel for its tax-exempt bond credit enhancement and securitization programs.

Our attorneys assist lenders in obtaining approval to originate and deliver loans to Fannie Mae and Freddie Mac, advise on servicing issues, negotiate loan participations and loan and servicing portfolio sales, and perform due diligence reviews. We have developed extensive relationships throughout Fannie Mae and Freddie Mac and have a solid understanding of their loan products, procedural requirements, and preferences.

### Tax Credit Practice

Ballard Spahr's tax credit practice is an integral component of our nationally recognized housing law practice, which is marked by a long history of leadership in the development and financing of housing and community development projects.

Ballard Spahr's tax credit practice team takes a comprehensive approach to representing clients in tax credit transactions. In addition to having handled a wide range of tax credit transactions, our lawyers have represented the many types of participants in tax credit deals. This broad perspective allows our team to take a practical approach to better understanding and achieving client's goals.

#### **Representation of Client Interests in Tax Credit Transactions**

Our team has considerable experience representing clients in tax credit deals. From sophisticated, upper-tier transactions to lower-tier investments, we have participated in nearly every type of housing transaction:

- 4% and 9% tax credit deals
- HOPE VI / Mixed-finance transactions
- Syndicated tax credits involving guaranteed and non-guaranteed funds
- State tax credit transactions
- Historic tax credits
- New Markets tax credits
- "80-20" transactions
- Restructuring and partnership disputes
- Lending and credit enhancement program development

#### **Spectrum of Representation**

Ballard Spahr represents the broad range of participants in the tax credit industry, including syndicators of federal and state tax credits, developers, housing authorities and other public entities, tax credit investors, and non-profit organizations. Our lawyers know and understand the expectations and requirements of the different entities involved in these complex transactions.

## Department / Practice Group Information

### **The Strength of Ballard Spahr is in our Breadth**

Our tax credit practice is highly integrated with the firm's national resources in lending, community development, housing authority representation, public finance, and tax. The result is well-coordinated efforts by our legal team to provide clients with the highest level of service.

Tax credit investing involves many legal complexities and requires a keen understanding of the entire process. Ballard Spahr's tax credit practice combines our experience in various complex transactions and representation of diverse participants with our broad resources and capabilities of nationally recognized practices to accomplish our clients' goals.

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