

# Ballard Spahr's 10<sup>th</sup> Annual Housing Symposium: A Decade of Housing Innovations and Foundations for the Future

November 6, 2015



# Agenda

## 2015 National Housing Symposium A Decade of Housing Innovations and Foundations for the Future

November 6, 2015 | Washington, D.C.

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>○ Molly R. Bryson, 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, Volunteers of America</li></ul> <b>Panelists</b> <ul style="list-style-type: none"><li>○ Thom Amdur, National Housing &amp; Rehabilitation Association</li><li>○ Bernard Fulton, U.S. Department of Housing and Urban Development</li><li>○ Nicholas Wyatt, U.S. Senate Finance Committee</li></ul>
10:15 - 10:30	<b>Break</b>	
10:30 - 11:45	<b>Session Two</b> Fair Housing and Disparate Impact: The Effect on Affordable Housing	<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>○ Michael Bodaken, National Housing Trust</li><li>○ Brian Gage, Houston Housing Authority</li></ul>
11:45 - 12:15	<b>Keynote Presentation</b>	<b>Presenter</b> <ul style="list-style-type: none"><li>○ Benson F. “Buzz” Roberts, National Association of Affordable Housing Lenders</li></ul>
12:15 - 1:15	<b>Lunch and Networking</b>	

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Time	Topic	Presenters
1:15 - 2:30	<b>Session Three</b> Innovative Approaches to Supportive Housing	<b>Moderators</b> <ul style="list-style-type: none"><li>○ Amy M. Glassman, Ballard Spahr</li></ul> <b>Panelists</b> <ul style="list-style-type: none"><li>○ A.J. Caputo, Clark Realty Capital</li><li>○ Kim Wilford, Salt Lake City Housing Authority</li><li>○ Elliot Frank, Autism Housing Development Corporation of Pittsburgh</li><li>○ Patrick Sheridan, Volunteers of America</li></ul>
2:30 - 2:45	<b>Break</b>	
2:45 - 4:00	<b>Session Four</b> Foundations of Financing for the Future	<b>Moderator</b> <ul style="list-style-type: none"><li>○ Christopher D. Bell, Ballard Spahr</li></ul> <b>Panelists</b> <ul style="list-style-type: none"><li>○ Emily Allison, Duvernay + Brooks</li><li>○ Angela Kelcher, Fannie Mae</li><li>○ Shaun K. Smith, Freddie Mac</li><li>○ Carl Wise, Alden Torch Financial</li><li>○ Theodore K. Toon, U.S. Department of Housing and Urban Development</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	

The agenda and attendee list are available online at <http://www.ballardspahr.com/2015nationalhousingsymposium>.

Speaker materials will be available online at [www.ballardspahr.com/2015symposiumhandouts](http://www.ballardspahr.com/2015symposiumhandouts) after the conference.

For further commentary and information on our program topics, please follow our blog at [www.housingplusblog.com](http://www.housingplusblog.com).

## Faculty

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# Faculty

## **Thom Amdur**

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Thom Amdur joined the National Housing & Rehabilitation Association 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 also serves as the Executive Director of the Tennessee Developers Council, a statewide trade association for affordable housing developers and professionals active in Tennessee. In 2013 he spearheaded the launch of NH&RA's Preservation through the Energy Efficiency Project, a major educational initiative supported by the John D. and Catherine T. MacArthur Foundation.

Mr. Amdur also serves on the Board of Directors for the International Center for Appropriate & Sustainable Technology (iCAST), a non-profit that develops and implements market-based environmental, economic and social solutions for issues that plague underserved communities. Mr. Amdur 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 Dworkbell Inc., a boutique association management and communications firm in Washington, D.C. Mr. Amdur was previously employed at a national lobbying firm focusing on financial services and technology issues.

Prior to 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.

## **Emily Allison**

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Emily Allison is a Managing Director of Duvernay + Brooks. Ms. Allison has been involved at every stage of the development process, from inception and master planning through negotiating closing documents and working to a financial closing. As a developer and a consultant, she collaborates with team members and clients to create and implement overall development strategies. Ms. Allison also creates program budgets and complex funding applications, negotiates business terms, and works with various

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governmental entities to secure necessary approvals. Ms. Allison has extensive experience in providing advisory services to public housing authorities. Among her current clients are the Dallas Housing Authority, Columbus (Georgia) Housing Authority, Louisville Metro Housing Authority, and the Lexington (Kentucky) Housing Authority. Ms. Allison also has significant experience with HUD's Rental Assistance Demonstration program; in 2014, she closed on one of the first cash-collateralized, tax-exempt bond RAD transactions.

## **Christopher D. Bell**

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Christopher D. Bell advises and represents real estate lenders, borrowers, and developers on transactional and regulatory issues, with a concentration on financing transactions involving government-sponsored enterprises (GSEs) such as Fannie Mae.

Prior to joining Ballard Spahr, Mr. Bell practiced for more than 10 years at Fannie Mae, a GSE chartered by Congress to support the secondary mortgage market. As the agency's Associate General Counsel of Housing and Community Development, he served as Fannie Mae's lead attorney for affordable housing transactions and secondary market construction loan participations and syndications. His experience includes a variety of complex real estate finance transactions, including those involving mortgage-backed securities, bond credit enhancement, mezzanine debt, senior housing, and pool purchases.

In addition, Mr. Bell served as lead counsel for Fannie Mae's corporate charitable arm, the Office of Community Investment and Engagement, where he provided legal counsel regarding grant documentation, intellectual property rights, procurement, audit, and compliance matters.

Mr. Bell has years of experience with form loan documents, requirements for Delegated Underwriting and Servicing (DUS) lenders, and product enhancement review and design.

Additionally, Mr. Bell has represented clients, both as in-house corporate counsel and as outside counsel, in the full range of real estate matters, including sales, acquisitions, foreclosures, zoning, land use, development cooperation agreements, retail and office

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leasing, bond purchase agreements, easement agreements, development conditions, and proffers.

## **Micheal Bodaken**

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Michael Bodaken serves both as President of the National Housing Trust and of the National Housing Community Development Fund, NHTCDF. The Trust engages in preservation policy, affordable housing development and lending. The Trust is committed to a 'balanced approach' to fair housing, which promotes access to wealthier communities through mobility and ensures that residents who remain in neighborhoods experiencing distress have access to resources and investments that improve their housing and neighborhoods.

He has been largely responsible for growing the organization in becoming a leader in the field of affordable housing and advocating for "Green Preservation" urging the targeting of resources for energy retrofitting of existing affordable housing. The Trust has financed and preserved over 25,000 affordable homes throughout the nation, involving over \$1 billion in financing. NHT Community Development Fund provides low interest loans to preservation developers across the U.S. Separately, NHT/Enterprise owns and operates 3,400 affordable apartments in eight states and the District of Columbia.

Mr. Bodaken is the convener of the National Preservation Working Group, a member of the Executive Committee of the National Housing Conference and is a former member of the Advisory Board of the Housing Development Reporter. He serves on the board of directors of Homes for America, Housing Preservation Project and Stewards for Affordable Housing (SAHF). He is a frequent guest lecturer and panelist at affordable housing industry events.

The Trust was the winner of the John D. and Catherine T. MacArthur Foundation Award for Creative & Effective Institutions.

# Faculty

## **Molly R. Bryson**

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Molly R. Bryson is Team Leader of Ballard Spahr's Tax Credits Team. She focuses on assisting major banks and companies with their investments in affordable housing, solar energy, businesses in low-income communities, and historic preservation using tax credits and commercial and subsidized financing. Ms. Bryson provides strategic advice to investors, syndicators, and developers in structuring the financing for low-income housing apartment complexes, ensuring that various federal and state subsidies work in tandem to allow for their development and continued operation. Her experience in this area of real estate development has made her an effective negotiator in complex business transactions.

Ms. Bryson also practices in the renewable energy financing arena by representing tax equity investors, developers, and lenders of solar energy projects in diverse markets and sizes. She structures the tax aspects of these transactions using industry frameworks such as partnership flips and the lease pass-through.

Ms. Bryson is a frequent lecturer on tax credits and has spoken at a number of conferences, including ones sponsored by the American Bar Association Forum on Affordable Housing & Community Development, the Pennsylvania Housing Alliance, and IPED Inc.

## **A.J. Caputo**

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A.J. Caputo has real estate development and asset management responsibilities for Clark Realty. Since joining Clark in 2000 he has been involved in the development and acquisition of approximately \$750 million of real estate and the asset management of its \$4.0 billion military and market rate housing portfolio.

Prior to joining the Clark Realty team, Mr. Caputo was a Senior Vice President with a large Chicago-based real estate property management and development company where he was involved in development, acquisitions and property management operations.



# Faculty

## **Elliot Frank**

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Elliot Frank is the President of the Autism Housing Development Corporation of Pittsburgh. He has been actively involved in the autism community for 20 years, serving eight years as Board chair for ABOARD's Autism Connection of PA. He has worked in the manufacturing, medical and software development fields.

## **Bernard B. Fulton III**

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Development  
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Bernard B. Fulton started his career with ACORN, a national coalition of neighborhood civic groups, where he was an organizer and advocate and rose to Legislative Director. His primary responsibility was lobbying to protect the Community Reinvestment Act (CRA) and the Home Mortgage Disclosure Act (HMDA) to encourage lending and banking services in underserved communities. While with ACORN, Mr. Fulton also served as ACORN's board member for the National Neighborhood Coalition.

Rep. Jan Schakowsky recruited Mr. Fulton from ACORN to assist with her work on the House Financial Services Committee. While he rose to be her Legislative Director, Rep. Schakowsky introduced anti-predatory legislation, amended Glass-Steagall reform legislation to study the impact of reform on small business lending, and was named one of Roll Call's top freshman legislators.

Mr. Fulton left Jan Schakowsky's office for the law firm Reno & Cavanaugh, where he served as Legislative Consultant. His major clients were the Council of Large Public Housing Authorities (CLPHA) and the Housing Authority Risk Retention Group (HARRG), and he advocated for federal funding for public housing, reauthorization of HOPE VI, a public housing redevelopment program, and expansion of the Risk Retention Act, which authorizes people and organizations to create federally chartered, membership-owned liability insurance companies.

Mr. Fulton joined New York City Mayor Michael Bloomberg's administration in 2005. He served as senior legislation representative in the Washington Office and focused on working with the New York Congressional delegation to meet the goals they

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shared with the Mayor, including for New York City's housing, education, and public safety needs. In this capacity, Mr. Fulton successfully protected radio spectrum for public safety communication at the FCC, eminent domain for community development, and voucher funding reserves for NYC's Section 8 programs.

Currently, for President Obama and HUD Secretary Castro, Mr. Fulton serves as the Assistant Secretary for Congressional and Intergovernmental Affairs, managing HUD's Congressional Relations team and overseeing legislative strategy.

## **Brian Gage**

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Mr. Gage joined Houston Housing Authority as the Senior Policy Advisor in 2012. Responsible for the oversight of all Houston Housing Authority's policy, compliance, public relations, and governmental affairs. Brian oversees policy and compliance for the Housing Choice Voucher Program (HCV) and Public Housing programs including, Rental Assistance Demonstration, Capital Fund, Choice Neighborhoods, Operating Subsidy, and Self-sufficiency programs. Previously he worked for the Department of Housing and Urban Development from 2002 to 2012. He developed policies, procedures, and guidance for the operations and management of the Housing Choice Voucher Program. As a HOPE VI Grant Manager he closed mixed finance rental and homeownership development activities and developed innovative solutions for HOPE VI Grantees. He also coordinated Moving to Work special initiatives including rent reform, business improvements, collaborative partnerships and self-sufficiency efforts for PHA's in the MTW demonstration program.

## **Sharon Wilson Géno**

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Sharon Wilson Géno is the Senior Vice President of Legal Affairs at Volunteers of America, Inc., the nation's largest non-profit affordable housing developer. For nearly twenty-five (25) years, Sharon has been dedicated to advising non-profit, for profit and governmental clients across the country on affordable housing and community development issues in a variety of contexts. As the senior corporate counsel to Volunteers of America, Sharon provides advice and counsel to the organization on a wide variety of legal matters, including housing operations and housing

development issues.

Prior to joining Volunteers of America, Sharon was a partner in private practice in Washington DC where she advised governmental entities, for-profit, and non-profit organizations across the country on issues related to housing and community development projects, government contracting, corporate structure, internal governance and compliance with Federal, state and local laws. During her career, Sharon has served as both in-house counsel and outside General Counsel for various types of organizations. Her work has given her substantive experience in many of the areas of affordable housing and community development law, including laws and regulations governing U.S. Department of Housing and Urban Development (HUD) programs, such as HOPE VI, public housing, Housing Choice Voucher (Section 8), the Community Development Block Grant Program (CDBG), the HOME program, and the Rental Assistance Demonstration Program (RAD). She has also worked in various tax incentive programs, including the Low Income Housing Tax Credit (LIHTC) program, New Markets Tax Credits (NMTC) program, and tax increment financing. Her legal experience includes providing advice regarding government and non-government contracts, non-profit organizations, corporate formation, litigation, employment law, tax law and other topics. She has also worked on legislation and advocacy efforts related to affordable housing programs on both the local and national levels.

Sharon has a Juris Doctorate from Georgetown University Law Center, a Masters of Arts in Urban Affairs from St. Louis University and a Bachelor's of Arts in American Studies from Newcomb College of Tulane University. She currently serves as an adjunct professor with Georgetown University School of Continuing Studies where she teaches Urban and Regional Planning. In addition, she is an adjunct professor at The George Washington University School where she teaches Housing Law and Policy. Sharon has also published pieces in numerous publications and is a frequent lecturer at national and regional conferences on legal and policy issues related to affordable housing and community development law.

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## **Amy M. Glassman**

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Amy M. Glassman represents public housing authorities, developers, nonprofits, and other recipients of HUD funds in regulatory, administrative, transactional, and related matters.

Ms. Glassman has extensive experience with HUD regulatory and statutory compliance issues. She works closely with housing authorities on applications for and implementation of HUD's Moving to Work (MTW) program, including negotiation of MTW agreements and development and implementation of MTW policies and programs. She assists clients on matters such as federal procurement requirements, relationships with public housing affiliates and instrumentalities, uses of program income, the Uniform Relocation Act (URA), and tenant-based and project-based housing choice vouchers. Ms. Glassman advises clients on fair housing, accessibility, and disability issues related to Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act, and Fair Housing Act, including policy development and fair housing investigations. She also defends clients in HUD debarment actions and Office of Inspector General audits and investigations.

Ms. Glassman's transactional practice includes work on mixed-finance public housing projects and related issues such as HUD demolition and disposition applications. She also advises clients on conversions of public housing to Section 8 using various methods, including disposition, voluntary conversion, and HUD's Rental Assistance Demonstration (RAD) program, and HUD multifamily housing matters.

Prior to becoming a lawyer, Ms. Glassman worked as an affordable housing consultant at the Cambridge Housing Authority and at TAG Associates.

## **Angela Kelcher**

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Angela Kelcher is the Director of Affordable Production for Fannie Mae's Multifamily Mortgage Business. In this position she manages production strategy and deliveries from the nationwide network of approved affordable lenders. The Affordable Channel focuses on properties with recorded rent or income restrictions or other affordability characteristics.

# Faculty

Before joining Fannie Mae in 2004, Ms. Kelcher worked for Bank of America providing construction financing for affordable multifamily properties. She also worked for SunAmerica structuring equity investments in Low Income Housing Tax Credit properties.

Ms. Kelcher has served on the board of the Central Arlington Housing Development Corporation and as an officer on the board of the North Texas Housing Coalition.

## **Benson F. "Buzz" Roberts**

National Association of Affordable  
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Benson F. (Buzz) Roberts is President and CEO of the National Association of Affordable Housing Lenders, an alliance of leading banks and mission-driven capital providers for affordable housing and underserved communities. Buzz was the Director of the Office of Small Business, Community Development and Housing Policy at the U.S. Treasury Department from 2011 to 2015. He was previously Senior Vice President for Policy and Program Development at the Local Initiatives Support Corporation (LISC), the nation's largest nonprofit investor in low-income community development. Mr. Benson has helped to create the Low Income Housing Tax Credit, the New Markets Tax Credit, the HOME housing partnerships program, the Capital Magnet Fund, a Treasury-HUD partnership to finance affordable rental housing, and bond guarantees for Community Development Financial Institutions. He has been a board member of several national nonprofit organizations and coalitions and has written extensively about affordable housing and community development.

## **Patrick Sheridan**

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Patrick Sheridan is an Executive Vice President for Housing with the Volunteers of America, a national, nonprofit, spiritually based organization. Mr. Sheridan is responsible for the overall strategy and administration of senior, multi-family, special needs housing and other real estate projects for the organization's national portfolio. Previously, Mr. Sheridan held the position of Assistant Deputy Administrator for Multi-Family Housing for the Rural Housing Service (RHS), an agency of the U. S. Department of Agriculture, where he was responsible for the implementation and management of the affordable multi-family housing programs administered by the Agency. He has also held the positions of Director of Housing Management with the Maryland Community

# Faculty

Development Administration of the Maryland Department of Housing and Community Development, along with private sector positions as Director of Loan Servicing for a national real estate advisory firm, and Director of Development for a multi-state apartment development company. He is a member of the boards of the National Affordable Housing Trust, Stewards for Affordable Housing for the Future, the National Housing Conference, the National Housing and Rehabilitation Association, an advisory board member to the Valued Advisor Fund, a new markets tax credit fund, and an editorial advisor to Affordable Housing Finance magazine.

## **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. Mr. Skojec's practice is focused on real estate litigation, construction matters, and fair housing and accessibility, including: real estate development dispute; mechanics lien claims; payment and performance bond claims; design and construction contracts; construction litigation and dispute resolution; condominium defects defense, housing discrimination defense; advice on compliance with accessibility laws, including the Americans with Disabilities Act (ADA) and Fair Housing Act; defense of housing accessibility and ADA claims; advice on Rehabilitation Act and UFAS compliance; and claims against design professionals.

## **Shaun K. Smith**

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Shaun K. Smith is Senior Director of Freddie Mac's Targeted Affordable Production group. In her role, she leads the national sourcing efforts and manages the company's marketing efforts with Freddie Mac Sellers and other constituents in the affordable housing space, including state and local housing agencies, policy makers, owners and investors.

During her tenure with Freddie Mac's Targeted Affordable Housing management team, she has been instrumental in doubling the company's annual volume in the affordable housing debt market. In addition, she is a frequent panelist and speaker at industry events.

# Faculty

A member of the Multifamily Division for 16 years, Ms. Smith was previously Senior Director of Targeted Affordable Underwriting and Credit, a post she held for six years. Prior to that, she held a variety of positions within the Risk Management and Underwriting and Credit Departments. A veteran of the commercial mortgage industry, she has also held production and marketing positions with The Archon Group, TIAA-CREF and CIGNA.

Ms. Smith has a B.A. in Government, cum laude, from Dartmouth College.

## **Theodore K. Toon**

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Theodore K. Toon is the Director of FHA Multifamily Development, with responsibility for oversight of HUD's multifamily mortgage insurance platform, including policy and procedures. Prior, Mr. Toon was Director of HUD's Office of Affordable Housing Preservation, focused on the preservation, recapitalization, and sustainability of the multifamily portfolio; Programs under his direction included the Mark to Market program, the Green Retrofit Program (a \$250 million Recovery Act program), and the restructuring and workouts in the FHA-insured multifamily mortgage portfolio. Prior to joining HUD in February of 2001, Mr. Toon was Vice President of ACG Professionals, an Atlanta-based consulting firm specializing in financial analysis, due diligence and underwriting services to the commercial real estate industry. He holds undergraduate degrees in Environmental Design, and Business, from the University of Colorado, Boulder, and earned a Master of Real Estate from MIT. Mr. Toon is also accredited through the US Green Building Council as LEED (Leadership in Energy and Environmental Design) AP (Accredited Professional) in Building Design and Construction.

## **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

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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 about \$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.

## **Kim Wilford**

Housing Authority of Salt Lake City  
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Kim Wilford is the Director of Operations at the Housing Authority of Salt Lake city with over 15 years of experience in the housing industry. Her career beginning started in the finance arena with her passion and dedication consistently ensuring the long term viability of housing authority projects. Throughout her tenure at the Housing Authority, Ms. Wilford specialized in the financial end of the development and operations of multiple supportive housing programs for the homeless blended with the Veteran Grant Per Diem program. She holds a Master Degree in Business Administration and a Master Certificate of Accounting.



# Faculty

## **Carl Wise**

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Carl Wise has over 30 years of experience in affordable housing both as an investor and working to raise investor equity. Mr. Wise works with equity investors in the tax credit syndication activities of the company. Previously, Mr. Wise was a Senior Vice President with Alliant Capital, responsible for overseeing the firm's property level investments and its multi-investor syndication platform as well as placing proprietary investments with select investors. Prior to joining Alliant Mr. Wise was Senior Managing Director for DaimlerChrysler Capital Services where he was responsible for lending activities as well as equity investments in income producing properties and in affordable housing funds and properties. He also served on DaimlerChrysler Capital's Board of Directors and Credit Committee for ten years. Mr. Wise is a graduate of University of Massachusetts and from New York Law School. He is a member of the bar in New York and Connecticut.

## **Nicholas Wyatt**

U.S. Senate Finance Committee  
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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 Chairman Hatch on many tax issues, including the Highway and Airport and Airway trust funds. He has been with the Finance Committee since 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.

## List of Attendees

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# List of Attendees

Last Name	First Name	Job Title	Company Name
Abel	Betts		TechMIS
Abrahams	Janet	Chief of Operations	Newark Housing Authority
Adams	Crystal		U.S. Department of Housing & Urban Development
Alkire	Bud		
Allison	Emily	Managing Director	Duvernay & Brooks LLC
Amatya	Jateen		PNC Bank
Amdur	Thom	Executive Director	National Housing & Rehabilitation Association
Ammarell	Scott	General Counsel	Chicago Housing Authority
Anderson	Frank	Executive Director	Housing Authority of the City of Orange
Anderson	Jessica	Executive Director	Rockville Housing Enterprises
Arnold	Althea	Legislative and Policy Associate	National Council of State Housing Agencies
Arnold	Jackie	Recap. Transaction Specialist	U.S. Department of Housing & Urban Development
Ashford	Ronald	Director, Public Housing Supportive Services	U.S. Department of Housing & Urban Development
Baietti	Joey		U.S. Department of Housing & Urban Development
Barker	Maria	Customer Account Manager	Fannie Mae
Barrie	Unisa	Neighborhood and Community Investment Specialist	U.S. Department of Housing & Urban Development
Baruwa	Buki	Program Analyst	U.S. Department of Housing & Urban Development
Becker	Robin	Assistant Project Manager	Chesapeake Community Advisors, Inc.
Belizaire	Monjia	Development Associate	Four Points LLC
Bell	Christopher	Partner	Ballard Spahr LLP
Bell	Peter	Executive Director	National Housing & Rehabilitation Association
Belot-Pave	Irene	Legal Counsel	Ally Bank Legal Staff
Benham	Caleb	Business Development Manager	Constellation Energy Resources
Benton	John	Portfolio Manager	Concourse Group
Bergemann	Crystal		U.S. Department of Housing & Urban Development
Best	Michael	Principal	Cardinal Court Capital, LLC
Bing-Grant	Max		U.S. Department of Housing & Urban Development
Binion	Caster	Executive Director	Housing Authority of the City of Pittsburgh
Blackburn	Luci	Team Leader	U.S. Department of Housing & Urban Development
Blom	Dominique	Deputy Assistant Secretary for Public Housing Investments	U.S. Department of Housing & Urban Development

# List of Attendees

<b>Last Name</b>	<b>First Name</b>	<b>Job Title</b>	<b>Company Name</b>
Bly	Belinda	Supervisory Public Housing Revitalization Specialist	U.S. Department of Housing & Urban Development
Bodaken	Michael		NHT/Enterprise Preservation Corporation
Boe	P. Nathaniel	Chief Development Officer	Housing Authority of the City of Pittsburgh
Boyd	Dana		U.S. Department of Housing & Urban Development
Brandenburg	John	Vice President - Asset Management	Enterprise Community Investment, Inc.
Brannum	Steven	Housing Financial Analyst	DC Department of Housing and Community Development
Brawner	James	President	J.H.Brawner & Company
Brawner	Jen		J.H.Brawner & Company
Brown	Robert	Administrative Vice President	Wilmington Trust
Brown	Michael	Director of Business Development	MaGrann Associates, Inc.
Brownley	Cary	Director	Hunt Mortgage Group
Bruggman	Michael	Presidential Management Fellow	Housing and Urban Development
Bryson	Molly	Partner	Ballard Spahr LLP
Buchanan	Kathy	Customer Account Manager	Fannie Mae
Buggs	Jesse	Chair MWCOC Housing Directors	MW Council of Governments
Cager	Lawrence	Manager - Multi-Family Production	Montgomery County Department of Housing and Community Affairs
Campanile	Roma	HOPE VI Architect Specialist	U.S. Department of Housing & Urban Development
Campbell	Boyd	Broker-Owner	CENTURY 21 Home Center
Caputo	A.J.	Development Executive	Clark Realty
Casey	Ken	Consultant	Casey Consulting Associates, LLC
Casey	Paul	Of Counsel	Ballard Spahr LLP
Castellanos	Francisco	RAD Program Manager	Baltimore Housing
Chapman	Hilary	Housing Program Manager	Metropolitan Washington Council of Governments
Charlton	Janet		National Foundation for Affordable Housing Solutions, Inc.
Chatman	Sylvia	Housing Program Manager	U.S. Department of Housing & Urban Development
Chiang-Smith	Asuntha	Chief of Staff	Maryland Department of Housing and Community Development
Cohen	Abby	Manager	Novogradac & Company LLP
Concannon	John		U.S. Department of Housing & Urban Development
Connolly	Paul	Vice President	R4 Capital LLC
Cosman	Jacob	Assistant Professor	Johns Hopkins University

# List of Attendees

Last Name	First Name	Job Title	Company Name
Creedon	Donna		Mission First HDC
Cullen	Sean	Director - Housing Capital Group	RBC Capital Markets
Cushing	Linda	Fair Housing Manager	Fairfax County Department of Housing
Cyr	Lila		Ballard Spahr LLP
Daka	Victoria	Regulatory Compliance Counsel	National Association of Federal Credit Unions
Dalzell	Robert		U.S. Department of Housing & Urban Development
Dante	Meredith	Associate	Ballard Spahr LLP
Davis	Stuart	Director	Fannie Mae
Davis	Tiffany	Business & Policy Analyst	MD Department of Housing & Community Development
Dempsey	Tanya	Vice President	CSG Advisors Incorporated
Diehl	Adam	Assistant Vice President	Lancaster Pollard
Dillon	Maryann	Executive Director	Housing Initiative Partnership, Inc.
DiMedio	Kevin	Partner	Reger Rizzo & Darnall, LLP
DiPaolo	James	Deputy Chief Financial Officer	Denver Housing Authority
Dowdy	Morgan		Fannie Mae
Dunham	Mark	External Affairs Counsel	Generations of Hope Development Corporation
Edson	Rick	President	Housing Capital Advisors, Inc.
Elder	M. Timothy	Partner	SGR
Evans	James	Director	Quadel Consulting
Extein	Lynn	Director, Affordable Housing Group	Freddie Mac
Fadlelmola	Belinda	Senior Management Analyst	U.S. Department of Housing & Urban Development
Farmer	Kenley	Analyst	DC Department of Energy and Environment
Ferreira	Nicole	Senior Advisor-Office of the Vice chair	New York City Housing Authority
Fleischman	David		U.S. Department of Housing & Urban Development
Flores	Virginia	Housing Program Specialist	U.S. Department of Housing & Urban Development
Folwell	Mary Grace		District of Columbia Housing Authority
Foster	Daniel	Capital Fund Projects Manager	Albuquerque Housing Authority
Fox	Cheryl	Director of Compliance	U.S. Department of Housing & Urban Development
Frank	Elliot	President	Autism Housing Development Corporation of Pittsburgh
Frazier	William	Executive Vice President, Chief Lending Officer	City First Bank of DC

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Fredericksen	Tom		Community Partnership
Frentzel-Beyme	Pam		Monument Realty
Fulton	Bernard	Deputy Assistant Secretary for Congressional Relations	U.S. Department of Housing & Urban Development
Gage	Brian	Senior Policy Advisor	Houston Housing Authority
Gardner	Ellen	Chief Operating Officer	Community Connections, Inc.
Gayles	Ebony	Housing Innovations Specialist/MTW Team	U.S. Department of Housing & Urban Development
Sharon	Wilson Géno	Senior Vice President of Legal Affairs	Volunteers of America
George	Mary Jo	Partner	Ballard Spahr LLP
Gilbert	Tia	Project Manager	DC Government
Glassman	Amy	Of Counsel	Ballard Spahr LLP
Goar	Katie	President	Quadel Consulting
Golden	Chris	Program Analyst	U.S. Department of Housing & Urban Development
Goldstein	Lee	Project Manager	District of Columbia Government
Gordon	Hannah		U.S. Department of Housing & Urban Development
Graham	Nicole	Principal	CSG Advisors
Greene	Michelle	Development Project Manager	Housing Authority of Baltimore City
Greenstein	Mitchell	Manager	Communities by Design
Guarnaccia	Teri	Partner	Ballard Spahr LLP
Gurjal	Tushar	Policy Analyst	NAHRO
Haberle	Megan		PRRAC
Halsband	Robin	Senior Vice President	City First Enterprises
Hannafin	Nemo	Director	Berkeley Point Capital
Hardwick	Amy	Director Product Development	Fannie Mae
Harpool	Adrian	Principal & Chief Strategist	Adrian Harpool Associates
Harris	James		Housing Authority City of Pittsburgh
Headen	Anthony	Project Manager	DC Revenue Bond Program
Henderson	John	PHRS - Grant Manager	U.S. Department of Housing & Urban Development
Hoffman	Matt	Vice President of Innovation	Enterprise Community Partners
Holleran	Mark	CEO	Central Arizona Shelter Services
Hopkins	Duane	Chief Financial Officer	Fort Collins Housing Authority

# List of Attendees

Last Name	First Name	Job Title	Company Name
Howe	Ned	Director of Development and New Business	Enterprise Homes, Inc.
Hsu	Jenny	Policy Analyst	National Association of Housing and Redevelopment Officials
Huell	Harriet	Chief Counsel	Charlotte Housing Authority
Hunter	Courtney	Associate	Ballard Spahr LLP
Husser	Bernie		The Richman Group Affordable Housing
Jackson	Joanne	Vice President	SLM Financial
James	Herbert	Grant Manager	U.S. Department of Housing & Urban Development
Johnston	Walter		NPCDC
Jones	Tiphonie		D.C. Department of Housing and Community Development
Jones	Tanisha	Underwriter	U.S. Department of Housing & Urban Development
Jones	Armstead		Department of Housing and Community Development
Kahn	David	Managing Director	Regions Bank
Kaiser	Timothy	Executive Director	Public Housing Authorities Directors Association
Kamenetz	Daniel	Housing Developer Associate	Empire Homes of Maryland, Inc.
Kane	Edward	Associate General Counsel	District of Columbia Housing Authority
Kaufman	Robert	Associate Director	SMBIA
Keck	Donna	HOPE VI/Mixed Finance Team Leader	U.S. Department of Housing & Urban Development
Angela	Kelcher	Director of Affordable Production	Fannie Mae
Kelly	Siobhan	Senior Policy Analyst	FHFA
Kettler	Naomi		Bank of America Merrill Lynch
Kincer	Blair	Partner	Novogradac & Company LLP
Kivell	Jonathan	Managing Director	Commerce Street Capital
Kobocow	Sara	Assistant Chief, Law Department/Real Estate & Economic Development	New York City Housing Authority
Koczela	Jim	Chief Financial Officer	Boulder Housing Partners
Laboy	Carlos	Director of Development	Municipal Housing Authority of the City of Yonkers
Lacki	David	Managing Director	Lancaster Pollard
Lapane	Lisa	Multifamily Asset Management	PNC Real Estate Finance
Larson	Jennifer	Program Analyst	U.S. Department of Housing & Urban Development
Lee	Chungyi		U.S. Department of Housing & Urban Development
Lefkowitz	Brad		Fannie Mae

# List of Attendees

Last Name	First Name	Job Title	Company Name
Leitch	Leslie	Program Manager	Cloudburst Consulting Group
Leiva	Annette		Freddie Mac
Leung	Karen	Neighborhood and Community Investment Specialist	U.S. Department of Housing & Urban Development
Lewis	Coyan	Project Manager	ODMPED
Lim	Meta	Manager of Assisted Housing Programs	Rockville Housing Enterprises
Locke	Tim	Development Manager	J.H.Brawner & Company
Loesberg	David		U.S. Department of Housing & Urban Development
Lommers-Johnson	Ashley	Executive Director	Everett Housing Authority
Lucio	Jose		The Community Partnership
Luo	Yonghong	Project Manager	DMPED, DC Government
Macció	Oscar	Director of Preconstruction Services	Hamel Builders
Macias	Adrian	Presidential Management Fellow	U.S. Department of Housing & Urban Development
Macleod	Brett	Vice President, Community Development Banking	JPMorgan Chase
Maliszewski	Paul		Federal Housing Administration, HUD
Manville	Laura		A & R Companies
Marsells	Roberta	Assistant Secretary	Housing Authority of the City of Milwaukee
Martin	Andrew		University Legal Services
McClain	Amy	Partner	Ballard Spahr LLP
McCoy	Antwoine	Senior Financial Analyst	Thomas & Herbert Consulting
McDonald	Thomas	Associate Director, Multifamily Asset Management	Freddie Mac
McIlvaine	Helen	Acting Director	Alexandria – Office of Housing
McRae	Lynnette		U.S. Department of Housing & Urban Development
Mensah	Bernice	Senior Housing Analyst	Maryland Department of Housing and Community Development
Meyers	Leslie	Senior Vice President	Bank of America Merrill Lynch
Miller	Sheila	Vice President Multifamily and 55+	NAHB
Miller-Pittman	Laura	Credit Risk Advisor	U.S. Department of Housing & Urban Development
Mohr	Amber	Associate	Ballard Spahr LLP
Montague	Terri	Legal Honors Law Clerk	U.S. Department of Housing & Urban Development
Moore	William	Vice President	Southway Builders Inc.
Moreland	April	Underwriter	Freddie Mac



# List of Attendees

Last Name	First Name	Job Title	Company Name
Moriarty	Ann	Director, Multifamily Communications	NAHB Research Center, Inc.
Morris	Brian		Charlotte Housing Authority
Morrison	Christina	Real Estate Asset Manger	Fannie Mae
Moscony	Charles	Director	Stewart Information Services
Mullen	Tess	Grant Manager	U.S. Department of Housing & Urban Development
Murphy	LaShonia	Senior Mortgage-Backed Securities Specialist	Ginnie Mae
Murphy	William		HUD - OPHI Chicago Regional Office
Mustapha	Madiana	Project Coordinator for Sustainable Financing	Economic Opportunity Studies, Inc.
Nazzaro	Marianne	Policy Advisor to the DAS	U.S. Department of Housing & Urban Development
Nelson	Richard	Commissioner	Housing Opportunities Commission
Nelson	Sylvia		U.S. Department of Housing & Urban Development
Nelson Robinson	Denise		Preservation of Affordable Housing (POAH)
Neumann	Kent	Partner	Eichner Norris & Neumann PLLC
Nicholson	Nick	Managing Director	Cain Brothers & Company, Inc.
Nigam	Aseem	Director, Real Estate Finance and Grants Management	Fairfax County Department of Housing & Community Development
Noland	Robert	Grant Manager	U.S. Department of Housing & Urban Development
Noonan	Joshua	PMF	U.S. Department of Housing & Urban Development
Norris	R. Wade	Partner	Eichner Norris & Neumann PLLC
O'Brien	Joy	Senior Counsel - Real Estate	The PNC Financial Services Group
Palanza	Cassandra	Director, Multifamily Council	NAHB
Paschal	Martha	TM	U.S. Department of Housing & Urban Development
Pleasants	Carolyn		Fannie Mae
Poczynek-Holdridge	Dawn	Senior Product Manager	Fannie Mae
Polyzois	Stephanie		PNC
Porter	Michelle	Director, Planning and Development	Housing Authority of Baltimore City
Porter	Marcie	Senior Managing Consultant	Public Financial Management, Inc.
Pour	Ivan	Director, Office of Capital Improvements	U.S. Department of Housing & Urban Development
Pouyes	Nydia	Associate	Ballard Spahr LLP
Powell	Andrea	Supervisory Counsel	District of Columbia Housing Authority
Powell	Johnette	Program Analyst	D.C. Department of Housing and Community Development

# List of Attendees

Last Name	First Name	Job Title	Company Name
Prince	Preston	Executive Director / CEO	Fresno Housing Authority The NHP Foundation
Prior	Tim	Senior Acquisition/Development Analyst	
Quigley	Eileen	Staff Attorney	Ballard Spahr LLP
Redican	Laurence	Deputy General Counsel	Philadelphia Housing Authority
Relihan	Frank	Vice President	NorthMarq Capital Inc.
Rhodes	William	Partner	Ballard Spahr LLP
Riddle	Jeffrey		U.S. Department of Housing & Urban Development
Rieman	Garth	Director, Housing Advocacy and Strategic Initiatives	National Council of State Housing Agencies
Ritz	Alison		WC Smith
Riveira	Noemi	Director of Real Estate Development	Habitat for Humanity of Northern Virginia
Robets	Benson	President and CEO	National Association of Affordable Housing Lenders
Roberts	Michael	Underwriter	Freddie Mac
Roberts	Laurie	Program Manager	Concourse Group
Robinson	Tiffany	Assistant Secretary	Maryland Department of Housing and Community Development
Rocca	Mary		Mary's House
Rosenberg	Alexa	Choice Neighborhoods	U.S. Department of Housing & Urban Development
Rowe	Paul	Principal	Paul Rowe & Associates
Rudow	Steve	Senior Vice President	AGM Financial Services, Inc.
Russell	Sean	Senior Loan Officer	Baltimore Community Lending
Santacreu	Allison		U.S. Department of Housing & Urban Development
Saull-Smith	Laura	Senior Vice President	Love Funding Corporation
Schonfeld	Joshua	Managing Associate General Counsel	Freddie Mac
Schwartz	Jennifer	Assistant Director for Tax Policy and Advocacy	National Council of State Housing Agencies
Sclafani	Salvatore	Senior Policy Analyst	U.S. Department of Housing & Urban Development
Seltz	Michael	Vice President, Housing Development	Volunteers of America
Shea	Karen		Oak Grove Capital
Shepherd	Steven	Program Analyst	U.S. Department of Housing & Urban Development
Sheridan	Patrick	Senior Vice President of Real Estate Development	Volunteers of America
Sherriff	Ryan	Senior Production Analyst	Greystone & Co.
Shlikas	Edward	Chief Problem Solver	Shlikas Solutions Inc.

# List of Attendees

Last Name	First Name	Job Title	Company Name
Shouman	Mohammad	Legal Fellow	D.C. Housing Authority
Simmons	Onawa	Underwriter	U.S. Department of Housing & Urban Development
Simpson	Roderick	Senior Planner	Department of Housing and Community Affairs
Singer	Elisa	Chairperson	New Rochelle Municipal Housing Authority
Slaughter	Kenneth	General Counsel	District of Columbia Housing Authority
Smith	Shaun	Sr. Director, Home Office Underwriting & Credit Multifamily Sourcing	Freddie Mac
Smith	Alastair	Development Project Manager	District of Columbia Housing Authority
Soffer	Ronald	Project Manager	Telesis Corporation
Smyser	Kerry	Deputy Director of the Office of Capital Programs	District of Columbia Housing Authority
Spady	Colin	Director of Business Development	Quadel Consulting
Sprecher	Stephen	Senior Multifamily Underwriter	U.S. Department of Housing & Urban Development
Star	Carol		U.S. Department of Housing & Urban Development
Steffen	Elizabeth		Chesapeake Community Advisors, Inc.
Stern	Miranda	Public Housing Specialist	U.S. Department of Housing & Urban Development
Street	Andrew	Legal Fellow	District of Columbia Housing Authority
Stretz	James	Senior Vice President	George K. Baum & Company
Swann	Andre	Project Manager	Deputy Mayors Office of Planning and Economic Development
Sylvester	Patricia	Director, Housing Policy and Programs	Maryland Department of Disabilities
Szumski	Dawn	Senior Compliance Officer- Fair Lending	JPMorgan Chase
Talios	Diana	Office of Multifamily Development	U.S. Department of Housing & Urban Development
Tatalovich	Caroline	Choice Neighborhoods Team	U.S. Department of Housing & Urban Development
Tawa	Christopher	Director, Multifamily Policy	HUD/FHA/Office of Multifamily Housing Programs
Taylor	Ted		U.S. Department of Housing & Urban Development
Thiele	Mark	Vice President, HCVP	Houston Housing Authority
Thompson	Alyce		U.S. Department of Housing & Urban Development
Tibrey	Rayna		Fannie Mae
Toon	Theodore	Director, FHA Multifamily Production	U.S. Department of Housing & Urban Development
Tran	Phuc	Investment Manager	Jair Lynch Development Partners
Tranchitella	Annette	Director of Practice Management, Real Estate	Ballard Spahr LLP
Turbov	Mindy		U.S. Department of Housing & Urban Development

# List of Attendees

Last Name	First Name	Job Title	Company Name
Turner	Marvin	Director	HUD National Capitol Area Office
Utecht	Kaylin	Business & Compliance Analyst	Housing Authority of the City of Milwaukee
Verna	Shanellah	Associate	Ballard Spahr LLP
Vielma	Catalina	Branch Chief, Office of Recapitalization	U.S. Department of Housing & Urban Development
Waddell	Anthony	Director, Public Finance	District of Columbia Housing Finance Agency
Warburton	Ryan	Partner	Ballard Spahr LLP
Washington	Richard		U.S. Department of Housing & Urban Development
Watkins	Muriel	President	MW Financial, Inc.
Watson	Jena	Associate General Counsel	Fannie Mae
Weber	David	Chief Operations Officer	Housing Authority of the City of Pittsburgh
Wells	Garth	Manager, Multifamily Asset Management	Freddie Mac
Whitehead	Carey	Legal Honors	U.S. Department of Housing & Urban Development
Wiecke	Kimberley		Fannie Mae
Wilds	Karen	Executive Director	Newport News Redevelopment and Housing Authority
Wilford	Kim	Director of Operations	Housing Authority of Salt Lake City
Williams	Risha	Director of Compliance & Asset	DC Housing Finance Agency
Williams	Kimberly	Grants Management Officer	Department of Housing and Community Development
Wilson	Susan	Director, Office of Urban Revitalization	U.S. Department of Housing & Urban Development
Winkler	Andrew	Director of Housing Finance Policy	American Action Forum
Winkler	Andy	Senior Policy Analyst	Bipartisan Policy Center
Winter	Michael	Deputy General Counsel	District of Columbia Housing Finance Agency
Wise	Carl	Senior Vice President	Alden Capital Partners LLC
Wojciechowski	Crystal	Policy Analyst	Public Housing Authorities Directors Association
Wolf	Brian		Fannie Mae
Woody	Imani	President and CEO	Mary's House for Older Adults
Wyatt	Nicholas	Tax and Nominations Professional Staff Member	U.S. Senate Finance Committee
Yu	Jill	Advisors	White House Initiative on Asian Americans and Pacific Islanders
Zorc	Beth	Senior Counsel	Senate Banking Committee

## General Firm Information

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# 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
  - EB-5
  - Investment Management
  - M&A/Private Equity
  - Securities
  - Transactional Finance
- Consumer Financial Services
- Employee Benefits and Executive Compensation
- Energy and Project Finance
- Environment and Natural Resources
- Family Wealth Management
- Government Relations, Regulatory Affairs and Contracting
- Health Care
- Housing
- Intellectual Property
  - Patents
  - Trademarks and Copyrights
  - Trade Secrets
  - Entertainment and Media
  - IP Due Diligence
  - Licensing
  - Intellectual Property Litigation
- Labor and Employment
- Litigation
  - Appellate
  - Class Action Litigation
  - Commercial Litigation
  - E-Discovery and Data Management

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- Product Liability and Mass Tort
- Professional Liability
- Real Estate and Construction Litigation
- Securities Enforcement and Corporate Governance Litigation
- Media and Entertainment Law
- 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
  - Insurance Companies and Institutional Investments
  - Private Equity Real Estate
- REITs
- Resort and Hotel
- Tax
- Exempt Organizations
- Tax Credits
- White Collar Defense/Internal Investigations

## Industries

- Higher Education
- Insurance
- Life Sciences and Technology
- Sports

## Initiatives

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

## Department/Practice Group Information

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# 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:

- 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
- HUD programs

## Department/Practice Group Information

- Mixed finance
- Section 8 contracts and vouchers
- Portfolio sales and acquisitions
- Tax credits

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

- Developers
- Mortgage and investment bankers
- General contractors
- Municipal bond underwriters
- Government-sponsored enterprises
- Nonprofit organizations
- Housing authorities
- Property managers
- Investors
- Special servicers
- Lenders
- State and local housing finance agencies
- Loan servicers and asset managers
- Syndicators

### **Government-Assisted 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.

# Department/Practice Group Information

## **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.

# Department/Practice Group Information

## 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.

Federal and state tax credits play a key role in project finance today. Whether financing a historic hotel, portfolio of affordable housing developments, charter school, or wind farm, clients benefit from our attorneys' knowledge of the tax credit marketplace and their counsel on getting the most out of tax credit financing.

We are experienced with all the major governmental tax credit programs. Types of credits include:

- Federal Low Income Housing Tax Credit (LIHTC)
- New Markets Tax Credit (NMTC)
- Federal rehabilitation tax credit (historic tax credit)
- Renewable energy production and investment tax credits
- Various state tax credits

Our attorneys have represented the spectrum of industry participants in these complex transactions, including project owners, lenders, investors, governmental entities, and credit enhancers. Our diverse client mix means that we can offer a broad range of effective solutions.

Our experience with deal structures is as varied. We work with those that involve combinations of tax credits, grants, tax-exempt bonds, and other subsidies. Our multidimensional experience enables us to represent clients through the life cycle of the deal, including asset refinancing, disposition, investor exit from the ownership, and resyndication. As an adjunct to their tax credit knowledge, our attorneys are fully versed in relevant real estate, federal and state income tax, finance, and creditors' rights issues.

Members of the tax credit team are leaders in the field who speak regularly at conferences and participate in leading industry groups.

### **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

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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.

### **Historic Tax Credit**

For decades, Ballard Spahr has represented clients in using the federal rehabilitation tax credit (historic tax credit) to finance historic redevelopment. We have handled transactions that take advantage of the credit for retail, hotel, office, and residential uses and in governmental projects.

Our attorneys are experienced in combining the historic tax credit with the Low Income Housing Tax Credit, the New Markets Tax Credit, renewable energy credits, and other subsidies to offset costs and maximize the benefits of historic redevelopment. We combine our legal and tax skills with investor market experience to effectively negotiate, document, and close transactions.

### **Low Income Housing Tax Credit**

For more than 20 years, Ballard Spahr attorneys have had one of the most active and diverse Low Income Housing Tax Credit practices in the country. Our team has handled LIHTC-financed affordable housing projects in all 50 states, Puerto Rico, and the U.S. Virgin Islands.

We have represented affordable housing developers, syndicators, investors in LIHTCs, credit enhancers, public housing authorities, and housing credit agencies. We are leaders in the use of public-private partnerships to construct, purchase, and renovate public housing using LIHTCs. And our attorneys have handled LIHTC transactions encompassing a wide variety of deal structures, including those involving a combination of tax credits, grants in lieu of credits, tax-exempt bonds, and project-based vouchers.

Our representation is not limited to helping developers with initial tax credit financing. We also assist tax credit investors and bankers with syndication of tax credits and portfolio transactions. In the area of syndication of tax credits, our experience includes unguaranteed pools as well as guaranteed funds involving a variety of credit enhancement vehicles, such as financial guaranty insurance,

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corporate guaranties, and letters of credit. We also handle distressed asset transactions related to affordable housing, including partnership disputes and restructurings.

### **New Markets Tax Credit**

The New Markets Tax Credit (NMTC) is an innovative and effective tool used to finance projects in low-income communities through a specially formed Community Development Entity (CDE), the sole recipient eligible for allocation of this distinct tax credit. Active since the NMTC was established by Congress in 2000, our practice is focused on the formation of CDEs, their application for allocation of NMTCs, and the crafting of appropriate financing structures. Our goal is for our clients to succeed in maximizing the value of NMTCs in all types of transactions.

We represent financial services institutions, nonprofit organizations, state and local governmental and quasi-governmental agencies and authorities, developers, owners, and operators. We counsel tax credit investors, leveraged lenders, participating lenders, private equity investment funds, community development entities, and qualified low-income community businesses.

Our multidisciplinary team:

- Evaluates eligibility, assesses potential benefits, and mitigates risks
- Forms, certifies, and quantifies community development entities
- Prepares, reviews, and files allocation applications and assists with regulatory filings
- Structures, negotiates, documents, and closes financing transactions, including direct investments, leveraged financings, blind pools, and syndications
- Counsels in the event of recapture, default, foreclosure, refinancing, and workouts

We have experience combining NMTCs with other tax credits and financing sources, such as historic rehabilitation tax credits, energy tax credits and incentives, state and local tax credits, grants and subsidized loans, tax-exempt bond financing, American Recovery and Reinvestment Act funds, Tax Increment

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Financing, Community Development Block Grant funds, federal government agency loan guarantees, and conventional financing.

### **Energy Tax Incentives**

The Energy and Project Finance Group structures renewable energy and energy efficiency projects to take advantage of a wide variety of energy tax incentives. Our broad experience with the financial markets and knowledge of business and regulatory issues allow us to structure creditworthy projects that meet clients' business and tax objectives.

We represent developers and investors on a wide variety of renewable energy projects in which energy tax incentives are available. These projects include hydroelectric, wind, agricultural biomass, landfill gas, wood waste, and geothermal electric generation, as well as ethanol and biodiesel production facilities. We also advise large end-users on strategies to reduce energy costs, including utilizing available energy tax incentives related to increasing energy efficiency and/or producing renewable or alternative energy.

We have structured public-private partnerships, profit-nonprofit partnerships, tax equity partnerships, and lease structures that utilize all available federal and state energy tax incentives. These include production tax credits, investment tax credits, tax credits for manufacturers of advanced energy equipment, tax deductions for energy-efficient commercial buildings, and renewable energy improvement special tax assessments.

We also develop strategies to combine energy tax incentives with other tax credits, such as the NMTC, and funding sources, such as loan guarantees, grants, and subsidized loans, including tax-exempt bonds, Clean Renewable Energy Bonds, Gulf Opportunity Zone Bonds, and Recovery Zone Facility Bonds.

# Department/Practice Group Information

## Housing Bonds

The firm's powerhouse housing practice is well known in the industry. Our attorneys represent public and private lenders, underwriters, tax credit syndicators, government-sponsored enterprises, and government agencies in all aspects of housing transactions. These transactions involve state, local, and private agency programs and the issuance of single-family and multifamily bonds, in addition to Freddie Mac, HUD, GNMA, and Fannie Mae programs.

In the tax-exempt bond area, we handle:

- FHA-insured mortgage transactions
- Project-based Section 8 transactions
- Market rate 80/20 and assisted living transactions
- HOPE VI transactions
- Low-income housing tax credits transactions
- Housing bond financings for 501(c)(3) organizations and governments

Since 1976, we have served as bond counsel or underwriter's counsel for more than one-quarter of the nation's state housing agencies, as well as for numerous local housing finance agencies and authorities. *Thomson Reuters* continuously ranks us among the top firms in the country each year as bond counsel and underwriter's counsel by dollar volume.

We also represent Freddie Mac on an ongoing basis as counsel for its tax-exempt bond credit enhancement and securitization programs.



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## About Our Sponsors



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Brawner & Company is a national real estate consulting firm specializing in the re-positioning, acquisition and rehabilitation of affordable multifamily housing. In the ever-changing world of housing, Brawner is synonymous with service and character and responds to its clients' needs by evaluating their assets, creating innovative solutions to broaden affordable housing options, reducing dependency on governmental funding sources, and understanding capital needs.

Since 1994, Brawner has provided far-reaching strategic and practical consulting services to Public Housing Authorities in addition to expertise in regional and national non-profit organizations. Over the last two decades, Brawner has assisted its clients in acquiring and developing over 12,000 affordable units with a combined value in excess of \$1.3 billion dollars. Approaching their work as objective partners and advocates, Brawner is passionate about not only producing creative housing solutions, but fostering integrity, loyalty and hard work. It is because of these principles that many of Brawner's clients remain with them today.

## About Our Sponsors

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As a financial consultant to affordable housing initiatives and as a developer of urban revitalization projects, Duvernay + Brooks contributes to the ongoing restoration of America's urban communities. We do this by crafting innovative, effective financial structures and by fostering collaborative, mutually supportive relationships among government agencies, private-sector partners, and community groups.

As a consultant to public- and private-sector developers of affordable housing, D+B has earned an outstanding national reputation by helping clients and development partners to create or revitalize thousands of units of affordable housing, from small developments to city-wide portfolios. D+B offers its clients—public housing authorities, other governmental entities, and private companies—a wide variety of services vital to the successful planning, financing, and implementation of affordable housing and related initiatives. Foremost among these services is our transaction-based financial consulting, which establishes strong working relationships among public agencies, private-sector partners, and funding sources.

D+B's development consulting services enable our clients to achieve their development goals. For public housing authorities, we develop methods suited to the particular municipal context and agency portfolio. For private developers, we provide a range of services throughout the pre-development, development and post-development periods.

Through sound strategic advice, D+B helps public housing authorities address the impact of specific initiatives upon citywide portfolios, and we provide guidance to agencies undergoing reorganization. For both public- and private-sector clients, we analyze portfolios and advise on policy-related matters.