



coasis coalition

COASIS COALITION OPPORTUNITY ZONE SUPERCONFERENCE

SPEAKER BIOS



Daniel Kowalski

Daniel Kowalski currently serves as a Counselor to the Secretary of the Treasury. In this role, Dan advises the Secretary regarding Treasury's efforts to drive the Administration's domestic policy agenda. His particular areas of focus are budget and fiscal policy; health, education and welfare policy; tax policy; and infrastructure policy. His duties include spearheading the development of IRS guidelines and reporting for the Opportunity Zone program.

Prior to Treasury, Dan was Deputy Staff Director of the Republican staff of the Senate Budget Committee. He also served as the Director of Budget Review for the Republican staff of the House Budget Committee. In those two positions, Dan helped shepherd several balanced budgets and reconciliation bills through the U.S. Congress. Dan started in Washington in 1995 with the Congressional Budget Office as a Principal Analyst in the unit responsible for preparing CBO's baseline budget projections.

In state government, Dan worked as Director of the Legislative Budget Office for the Missouri General Assembly, and as the senior individual income tax analyst with the Republican staff of the Finance Committee for the New York State Senate. He started his career as a management analyst for the Deputy Commissioner for Audit in the New York City Department of Finance.



Gerry Reihsen

Gerry Reihsen is the Founder and Chief Executive Officer of Coasis Coalition Companies PB LLC, a public benefit company that provides support, services and products to the Opportunity Zone ecosystem, including its (a) investment and other economic participants, (b) agencies and organizations that are historically dedicated to assisting under-optimized communities, (c) state and local economic development agencies, and (d) residents of those communities.

Gerry was a founder of Behringer Harvard Funds, a real estate investment fund platform built from the ground up that generated more than \$5 billion in equity investment capital and over \$11 billion in assets under management over a decade in various innovative investment products, and Xybridge Technologies, a telecom software enterprise also begun as a startup that developed the essential software technology/soft switch for mobile and other networks that achieved an exit at a valuation of over \$400 million.

Gerry accesses a 35-year foundation of high level international corporate-securities law and global entrepreneurial dynamics to build innovative businesses. He is uniquely suited through expertise and experience to build an ecosystem that can optimize the Opportunity Zone program for his companies and those they serve.



Harry A. LaRosiliere

Mayor Harry LaRosiliere (La Ross el lee air) was elected Mayor of Plano in 2013. He was sworn in as Plano's 39th Mayor and is the first African American to be elected to this office. In May of 2017, he was sworn in for a second term. Prior to this he proudly served his community for six years as a two-term City Council Member.

Mayor LaRosiliere's primary focus has been to create a robust economic development environment that will generate an upward cycle of prosperity for all. During his tenure, Plano has established itself as a regional employment destination. Quality job creation provides the resources to deliver outstanding services, revitalize neighborhoods and invest in City assets. Some of the successes in recent years include major corporate relocations such as: Toyota, Liberty Mutual Insurance, JP Morgan Chase and

Co., Boeing Global Services, and FedEx Office to name a few. Mayor is also very proud of the many small businesses that are thriving and expanding in our city as well.

Mayor LaRosiliere firmly believes as a premiere city, Plano rightfully deserves a voice on the national stage. He is an active member of the bipartisan organization, the United States Conference of Mayors. He serves as Chair on the prominent Transportation and Communications Committee where he takes part in meaningful conversations with mayors across the nation.

Mayor LaRosiliere is equally passionate about fostering a sense of community and delivering what he calls the Plano Promise: “Our City will protect you. Our schools will educate you, and our community will nurture you.” This has inspired him to launch three key community initiatives that are designed to touch the lives of children in all continuums of their life. The Nourishing Hope Program affirms to our food insecure elementary students and their families that they will be provided access to nutritious food when needed throughout the year. Plano Families First is designed to give those families access and information on healthcare and education resources, as well as assistance with employment opportunities. Mayor is most proud of the Plano Mayor’s Summer Internship Program, which offers senior high students real-world workplace experience through an eight-week paid internship. This program equips our youth with valuable skills not offered to them in high school and builds a bridge for the future workforce to come back to Plano. Since the program’s inception, over 500 interns have graduated from the program.

Mayor LaRosiliere was born in Haiti and moved to New York with his family when he was three years old. Although he became a U.S. citizen at age 18 he often states, “Being an American meant that I could accomplish anything I chose to do and the only boundaries that existed were the ones I built.” Mayor LaRosiliere is a financial advisor with the global wealth management firm. He often says, “My life is a three-legged stool with family, work and public service which rests on my faith.” He lives a life of passion so he can contribute the most he can. With all of his accomplishments, he is most proud of his family. He especially enjoys spending time with his wife, Tracy, and their two daughters.



Levi H. Davis

Levi Davis is the Chief Executive Officer of the Community Council of Greater Dallas. Mr. Davis is well known to the Dallas Community having served at City Hall as Assistant City Manager in several key roles including the oversight responsibility for police, fire, municipal courts, health and human services departments. Additionally, he was involved in the development of the Police Review Process and the 911 and 311 systems. He also led the development of the South Dallas Trust Fund. Later, he served as the Western Region Public Finance Director for the 12th ranked investment banking firm in the nation. He then founded the Hamilton Financial Group, specializing in urban planning and development, long-range municipal financial planning and affordable housing.

For decades, Davis has been dedicated to the North Texas community and its philanthropic growth. His extensive civic leadership includes serving as Chair of the Dallas Methodist Health System as well as previous service on the Board of Directors of the Community Council as Board Chair. Additionally, he has served as the Board Chairman of the Texas Hospital Trustee Association and Vice Chair of KERA North Texas Public Broadcasting. Most recently, Davis was selected to launch the Advance Community Fund, a nonprofit lender and technical assistance provider focused on the support and development of sustainable communities and the development of both affordable and market rate housing for all citizens—recognizing that the increase of single family and multi-family affordable housing stock in Dallas is a key strategy to help lift families out of poverty.



Craig A. Nolte

Craig Nolte is a Regional Manager for Community Development with the Federal Reserve Bank of San Francisco. Craig is responsible for the design and performance of the Federal Reserve’s community development and economic growth initiatives in Washington, Idaho, Utah and Alaska, with special focus on low-and moderate-income communities. To advance cross-sector solutions to complex issues, Craig collaborates with multiple public and private-sector partners involved in workforce development, affordable housing, community development banking, Indian Country, health, rural broadband, small business and economic inclusion. Prior to joining the SF Fed, Craig served as a bank examiner at the Office of Thrift Supervision, and continues to provide training on the Community Reinvestment Act at regional and national events.



Brad Thomas

Brad Thomas writes weekly for Forbes.com and Seeking Alpha providing “real time” REIT research on many publicly-listed REITs and commentary on real estate investment and industry participants. In addition, Thomas is the editor of Forbes Real Estate Investor, a monthly subscription-based newsletter. Thomas has also been featured in Forbes Magazine, Kiplinger’s, US News & World Report, Money, NPR, Institutional Investor, GlobeStreet, and Fox Business. He is ranked as the #1 analyst on Seeking Alpha and he is the author of two books. Thomas received a Bachelor of Science degree in Business/Economics from Presbyterian College where he played basketball. Brad’s current efforts include analysis and

consultation regarding real estate focused Opportunity Zone investments and Qualified Opportunity Funds.



Steven R. Schneider

Steven R. Schneider is a partner in Baker McKenzie's Washington, DC office, and leads the firm's passthroughs tax group. He started his career as a lawyer in the IRS' national office and has had many years of national-level law firm and Big-4 accounting firm experience. Mr. Schneider also previously chaired the ABA Partnership Tax Committee. He has been teaching an advanced tax course on drafting partnership and LLC agreements at Georgetown University Law Center since 2005, is a regular speaker at national tax venues, and has published numerous articles on tax for Taxes: The Tax Magazine, Tax Notes, Bloomberg BNA and Journal of Taxation, among many others.

Mr. Schneider is a nationally recognized tax lawyer who focuses his practice on transactional, controversy and tax policy matters. He has significant tax experience in mergers & acquisitions, private equity and real estate funds, cross-border tax, partnerships, real estate, REITs, international investors (including sovereigns), and S corporations.



Anthony J. Chereso

Tony Chereso, President and Chief Executive Officer of the Institute for Portfolio Alternatives, has over two decades of experience in the financial services industry – from capital markets, due diligence, corporate accounting, finance, audit, customer relations, administration, to sales and marketing. Previously Tony served as the Director of Capital Markets for UDF. Prior to UDF, he served as President and CEO for FactRight, LLC, a leading third party independent due diligence and research firm. Tony oversaw FactRight's strategic initiatives, business development and operations. His twenty years working for Fortune 100 companies, including eighteen years of corporate finance, tax and audit with Verizon Communications, have provided him with unique leadership expertise and a global business perspective. Tony taught for the Institute of Internal Auditors and has been recognized as a distinguished instructor for the Institute of Internal Auditors.



Jill Homan

Jill Homan is President of Javelin 19 Investments, a Washington, DC-based real estate investment and development firm with more than \$155 million in investments and transactions and a leader in the new Opportunity Zone (“OZ”) area. Ms. Homan has more than fifteen years’ experience in real estate acquisitions, dispositions, development, financing, asset management and leasing totaling over \$400 million in total capitalization.

Ms. Homan worked with legislative and Administration members to develop a comprehensive understanding of the OZ program and advocate for regulations that allow for the real estate industry to participate in the OZ program. She spoke before the Treasury Department in its hearings on the IRS’s first round of OZ regulations. She has helped working groups of attorneys and accountants develop real estate deal structures and strategies to fit into the program guidelines, and advocated for issues of importance to the real estate industry.

As a fifteen-year veteran of real estate development, Ms. Homan is co-developing a \$52M multifamily project in an Opportunity Zone and currently raising Opportunity Fund capital. Ms. Homan has applied her knowledge of emerging communities and her expertise in policy and real estate to advise investors and developers on the new OZ program. She has been a featured panelist on numerous OZ programs and conferences

Ms. Homan previously worked as vice president for Perseus Realty, where she was responsible for acquisitions, underwriting, and assisting in the capitalization of ongoing projects. She assisted in the formation and structuring of a discretionary GP investment partnership and managed its investor relations.

Ms. Homan has extensive political and policy experience, having worked on Capitol Hill as a legislative assistant and press secretary. Currently, she holds elective office and senior party leadership positions. Further, she was one of eight members of the site selection committees for the 2016 and 2020 national conventions for a major political party.

Ms. Homan is LEED® accredited professional (Leadership in Energy and Environmental Design Accredited Professional) and a member of Commercial Real Estate Women DC (CREW DC). She has been a featured speaker and received recognition at events with DCBIA, CREW DC, Bisnow, and DCA Live. Ms. Homan serves on several non-profit boards, including the Board of Visitors for Duke University’s School of Public Policy, and co-chairs the Duke University’s alumni organization in the metro Washington, DC region. She resides in Washington, DC.



Michael Dermer

Michael Dermer is an entrepreneur, speaker, lawyer and founder/author of The Lonely Entrepreneur. Michael is considered the founder of not only a company, but an industry – rewarding individuals for healthy behavior. Michael left a promising corporate law career to start IncentOne, the first company to provide rewards for healthy behavior. Michael’s harrowing journey through the financial crisis of 2008 and sale of his company led him to his current mission to empower entrepreneurs. Since selling his company, he created The Lonely Entrepreneur to help entrepreneurs turn their passion into success.

In addition to helping entrepreneurs, The Lonely Entrepreneur’s non-profit wing works closely with community, women, diversity and related social responsibility groups to empower those less fortunate with the entrepreneurial resources they need.

Michael’s mission is to unlock the potential of entrepreneurs worldwide by turning the passion and pressure we all feel into success.



Nicholas (Nick) Cerasuolo

Nick Cerasuolo is us a Senior Manager-Corporate Tax based in the San Francisco of Deloitte Tax, LLP. Nick is a buy-side transactional tax adviser, advising funds and corporate clients on a variety of cross-border tax planning initiatives, including the design and implementation of US and non-US investment vehicles for structuring a cross-border real estate deal.



Kevin Shtofman

Kevin Shtofman serves as a Global Technology Strategy Lead in the Real Estate practice of Deloitte Consulting LLP. Kevin has spent the past 16 years providing strategic, business improvement, and technology services to real estate owners, operators, developers, service providers, and asset managers.

Kevin has been working on Blockchain, Robotics, and Cognitive Automation initiatives for the past three years and has presented to audiences across the globe in 27 cities to date, including multiple podcasts and news articles.

Kevin has completed multiple Qualified Opportunity Zone Fund feasibility analyses for institutional fund managers since early in the incentive program's effectiveness and is hosting delegations from Europe, Asia, and the Middle East in the second quarter of 2019 to engage regarding use of Opportunity Zone incentives for U.S. operations.



Brian P. Phillips

Brian Phillips has a blend of being an early-stage entrepreneur, a global expert on economic development by using entrepreneurship, an advisor to Ivy League faculty on how to convert their inventions into viable businesses, and an intrapreneur in several global organizations.

Mr. Phillips has been a part of the founding team of a dozen startups. Two went public, two were acquired and one was sold via an MBO. As a founding CEO he has raised over \$33M in venture capital.

Mr. Phillips has been an advisor on entrepreneurship to global firms like Goldman Sachs, Wal-Mart, Coca-Cola, IBM and Arthur Young, as well as charitable organizations focused on entrepreneurship like the Aspen Institute, TechoServe and Endeavor Global. He has met and worked with hundreds of entrepreneurs in the USA, as well as in Africa, India, China and Latin America.

Mr. Phillips is also an active member of the Academic Venture Exchange, which is a collaboration between the technology transfer offices at Ivy league universities' and experienced entrepreneurs.

Through this agreement Mr. Phillips worked with faculty from Columbia, Cornell, and Princeton Universities.



Giovanni Méndez Esq.

Giovanni Méndez Esq. is the Managing Member of Global Economic Optimization (GEO Tax), a consulting firm that provides its clients with one-stop, seamless entry into Puerto Rico's various economic incentives programs. Giovanni is also a Member-in-Charge of Legal and Compliance for Baltic Avenue Investments, one of the First Qualified Opportunity Zone Funds on the island.

Formerly with BDO Puerto Rico/USVI and previously with other prominent tax and legal firms, Giovanni has extensive experience as a corporate and tax attorney, including compliance, financial reporting, tax preparation, and regulatory matters.

Admitted to the Puerto Rico Bar and United States Tax Court, Giovanni has advised clients at both the State and Federal levels. His clients have included Fortune 500 companies, pharmaceutical companies, telecommunications firms, financial services companies, e-commerce, technology and software companies, private equity investors, Opportunity Zone funds, blockchain technology companies, and high net-worth individuals.

Giovanni's practice includes structuring of tax exempt and taxable operations in Puerto Rico, structuring of complex business transactions, transfer pricing consulting, entity formations, negotiation of tax exemption decrees, tax planning and counsel for Puerto Rican and United States federal international income tax matters, including Opportunity Zone matters, and accounting services.

During the past years, Giovanni has served as advisory counsel for many investors and businesses seeking grants of tax exemption under Puerto Rico's Acts 20 and 22. As a blockchain technology investor and advisor, Giovanni has played a key role in the development of Puerto Rico as an investment destination for the industry. Giovanni's unique access to the burgeoning global and local cryptocurrency industry provides his clients with invaluable insight.



Bryan S. Mick

Bryan S. Mick is the President of Mick Law P.C. in Omaha, Nebraska, and a provider of independent due diligence legal services for various broker-dealers, registered investment advisors, family offices and other investors throughout the country.

Mr. Mick was formerly a partner with Husch Blackwell, a 600-lawyer regional law firm based in Kansas City, Missouri. His private practice involves not only broker-dealer representation but real estate acquisition, development, and finance. He was also general counsel and investment banking Senior Vice President for a broker-dealer in Omaha that syndicated real estate equity offerings in hospitality, senior living, office and retail development and acquisition.

Mr. Mick's due diligence representation involves a concentration in real estate equity fund, including Qualified Opportunity Zone Funds, development project, distressed debt and REIT reviews. He also reviews and finalizes the work product of other firm lawyers, and their real estate underwriting and petroleum consultants. He is proud to provide his clients individualized legal opinions with an additional focus on project and fund structure, financing, valuation and exit analysis. Mr. Mick is also privileged to represent several life insurance companies, banks, apartment and subdivision developers, conduit loan servicers and real estate loan opportunity funds.

Mr. Mick was a member of the Creighton Law Review and authored an ABA-nominated article on hostile takeover defenses. He has also published a number of articles, and presented at many national conferences, covering real estate offerings, Opportunity Zone matters, regulatory matters and broker-dealer operations.



Brent Parker

Brent Parker is a principal in the Long Beach, California, office of Novogradac & Company LLP. Mr. Parker is experienced in affordable housing and community development, nonprofit organizations and public housing authorities, historic rehabilitation, and renewable energy, with a particular focus on the low-income housing tax credit, investments in Qualified Opportunity Funds, renewable energy tax credit, new markets tax credit and historic tax credit industries.

In addition to providing various consulting and forecasting services, Mr. Parker leads extensive tax planning and tax return preparation engagements for a wide variety of clientele and works extensively on financial statement audits, reviews and agreed-upon procedures engagements. In response to growing demand, Mr. Parker has become a frequent presenter on Opportunity Zone panels and workshops in several states. He is also a contributor to the Novogradac Journal of Tax Credits and leads professional development training efforts on various complex taxation concepts. Mr. Parker received a bachelor's degree in accounting from the University of Southern California and is a certified public accountant in the State of California.



Kevin A Shields

Mr. Shields founded Griffin Capital in 1995 and serves as the Company's Chairman and Chief Executive Officer. Griffin Capital is the sponsor or co-sponsor of two '40 Act Interval Funds; Griffin Institutional Access[®] Credit Fund and Griffin Institutional Access[®] Real Estate Fund, and several public, non-listed real estate investment trusts; Griffin-American Healthcare REIT IV (GAHR IV), Phillips Edison Grocery Center REIT III, Inc., and previously sponsored or co-sponsored Griffin-American Healthcare REIT III, Inc. (GAHR III), Griffin Capital Essential Asset[®] REIT, Inc. (GCEAR), and Griffin Capital Essential Asset[®] REIT II, Inc. (GCEAR II). Mr. Shields is also Chairman of Griffin Capital Securities, LLC, a FINRA registered broker-dealer which serves as the dealer manager for the REITs and the exclusive wholesale marketing agent for Griffin Institutional Access Credit Fund and Griffin Institutional Access Real Estate Fund



Benton C. Blaine

As a vice president on McGuireWoods Consulting's infrastructure and economic development team, Benton Blaine assists companies in their expansion and development projects. His experience with site selection, incentives negotiation and public-private partnerships allows him to provide value-added services to a range of internal company stakeholders including finance, operations, real estate, government relations and tax. Benton has successfully orchestrated inbound projects from countries such as China, Germany, Hungary, Israel, Italy, Switzerland and the U.K., among others. In assisting inbound and U.S.-based companies, Benton has analyzed hundreds of locations for companies across

30+ U.S. states and secured capital savings and/or mitigated risk that has had a direct reduction in a client's initial or recurring costs.

The business acumen developed as a senior manager at a “Big Four” accounting firm, licensed real estate broker and on a Fortune 500 company’s real estate legal team, has helped Benton locate headquarters, manufacturing, chemical, distribution and office projects.

Benton has been a speaker or presenter for events such as the SelectUSA Summit and AreaDevelopment’s Meet the Consultant, covering topics including pitfalls when entering the U.S. market and creating win-win solutions for companies and economic development agencies.



Chris Hamm

Chris Hamm is a Co-Founder of Consulting and Ancillary Services of Puerto Rico (CASPR) and CASPR’s Chief Executive Officer and in-house business expert, specializing in middle market tax strategies and international tax compliance. Chris is an Illinois licensed CPA. As a member of the AICPA and a former board member of the ICPAS Accounting Principles Committee, Chris is active in the Chicago CPA community. In Puerto Rico, he works closely with the Department of Economic Development and Commerce to facilitate new investments and was a featured speaker at the 2018 Puerto Rican Investment Summit.



Nicholas Bergfeld

Dr. Nicholas Bergfeld MD MPP is a Fellow at the Texas Tech University Rawls College of Business and a policy adviser for the City of Lubbock’s elected officials. Nick’s work focuses on developing private-sector driven approaches to community development and revitalization, and he currently is leading the City’s policy strategy for the Opportunity Zone program. Before returning to his native West Texas, Nick was the Health Practice Manager for LeapFrog Investments, the largest emerging markets impact investing private equity firm. He was an inaugural Jerome H. Grossman M.D. Health Policy Fellow at Harvard’s Kennedy School of Government and conducted landscape and market analysis of the Social Impact Bond ecosystem for the Morgan Stanley Institute for Sustainable Investing.



Sam Viskovich

Sam Viskovich, Vice President of Marketing with Reonomy, is blazing a path in the commercial real estate tech space and the effect has been explosive growth for the data company Reonomy. Reonomy leverages the power of data and technology to transform commercial real estate. With Reonomy Sam provides the commercial real estate space with the tools it needs to take the industry into the current data-dominated competitive market.

A student of the marketing game, Sam has touched and led marketing strategy for everything from healthtech to clothing to food technology. Originally from New Zealand, Sam previously founded a sports tech company that continues to support millions of viewers a year.



Chris Rawley

Chris Rawley founded Harvest Returns in the fall of 2016 with the intention of providing farmers with flexible, responsive funding sources by connecting them to investors. His passion for bringing more people closer to the producers of their food is reflected in the company's motto of "Democratizing Investments in Agriculture." He is the fund manager of the company's Sustainable Agriculture Opportunity Zone Fund.

Rawley is a native of Dallas, Texas and currently resides in Fort Worth. After several years as an active duty naval officer, his interest in real asset investing began as a property manager with Jones Lang LaSalle, running a \$100 million commercial portfolio in Dallas. Subsequent to that position, he held corporate management roles in Electronic Data Systems and L-3 Communications and served as a defense consultant at United States Special Operations Command with Blackbird Technologies. He has invested in residential and commercial real estate, including income-producing agriculture, for more than twenty years.

Rawley is a Captain in the United States Navy Reserve having served in Afghanistan, Iraq, throughout Africa, the Persian Gulf, and Western Pacific.



Jarick Poulson

Jarick Poulson is a Tax Senior Manager in the Global Investment & Innovation Incentives group of Deloitte Tax LLP. He has 16 years of professional experience in public accounting with a focus on structuring and syndicating federal tax credits and incentives that include the New Markets Tax Credit and Qualified Opportunity Zones. He advises both investors and beneficiaries, and his clients include large financial institutions, nonprofit organizations, manufacturers, retailers, municipalities, technology companies, real estate developers and fund managers.



Sherri H Cooke

Sherri Cooke, Chief Executive Officer and Founder of AI Insight, Inc., has been in the financial services industry for over 25 years.

Sherri formed AI Insight in 2005 with the primary goal of providing the financial planning community with a consistent database of alternative investment programs. AI Insight launched its web-based database and interactive infrastructure to support what she believed at the time were the missing links in training and education for alternative investments to broker dealers and sponsors in 2007.

Since its launch, the AI Insight platform continues to integrate new features and system enhancements to increase efficiencies and effectiveness in the delivery of education, training and research on complex products. For example, the platform recently added coverage of 70+ alternative mutual funds to help advisors conduct side-by-side product comparisons and frame their use of liquid alternatives. AI Insight is also a leading provider of education and product-level training on the new Opportunity Zone Funds.

Prior to forming AI Insight Inc., Sherri was a consultant to the industry providing insight on product structuring and positioning, product education, and strategic implementation of alternative investments products within the broker dealer community.

Sherri served as Senior Vice President with a San Francisco-based equipment leasing sponsor for six years. Prior to that position, she was Vice President & Head of Due Diligence with another California-based sponsor from 1989 to 1996.

Product development, due diligence, compliance and key account management have been her primary areas of industry contribution. She has also worked extensively in all aspects of product marketing.



María de los Angeles Rivera

María de los Angeles is the Head of the Tax Department and International Business Center Director of Kevane Grant Thornton. In her role as tax partner, she serves clients in various industries, with a focus on those in hospitality and manufacturing. María assists clients with decisions related to tax applications and audits and helps business clients and their owners to lessen corporate, individual, estate and gift taxes.

Since the designation of Puerto Rico as an opportunity zone, María has been engaged in presentations as guest speaker leading the firm's initiatives around the Opportunity Zones incentive, worked with grant applications, the development of tax planning structures for individuals and businesses, and other incentives programs for eligible taxpayers. She is responsible for the administrative aspects of the Tax Department and coordinates the technical tax trainings of the tax department professionals. In addition, she is member of the firm's Executive Committee.

Mrs. Rivera is a member of the Tax Committees and the Business Women Networks of the Puerto Rico Chamber of Commerce and the Puerto Rico State Society of Certified Public Accountants. She is also an active member in Ellevate – Puerto Rico Chapter. In 2017 she was awarded by the Woman Who Lead organization as "Executive Woman Leader". In 2015 she was recognized in the International Accounting Bulletin Power 50 list, among most influential people in the global accountancy profession. During September 2014, she was recognized, for her outstanding services, as a "Distinguished CPA" by the Puerto Rico State Society. She participates in the Continued Educational Program of the Puerto Rico State Society of Certified Public Accountants and the American Institute of Certified Public Accountants. On June 2012, María was awarded by the Puerto Rico State Society as one of its distinguished colleagues and to whom the Accountants' Week was dedicated.

Among Mrs. Rivera's publications are numerous tax articles written for local newspapers and magazines. She is an active correspondent of the International Bureau of Fiscal Documentation (IBFD) for Puerto Rico.



Gordon Goldie

Gordon Goldie is one of the leaders of Plante Moran's Housing and Community Development Solutions Group. He spends 100 percent of my time assisting for-profit and not-for-profit clients with real estate development projects involving tax incentives such as Opportunity Zones, New Markets Tax Credits (NMTCs), and Historic Tax Credits (HTCs). Gordon assists clients nationwide in identifying available tax incentives and structuring transactions to optimize the net benefit of these incentives while ensuring compliance with all applicable tax law requirements.

Gordon is known nationally as a technical expert on tax credits and incentives such as Opportunity Zones, NMTCs, and HTCs within the accounting industry. As one of the founding members of the Housing and Community Development Solutions Group, he has been instrumental in helping the group close transactions involving more than \$1.7 billion of NMTCs, HTCs, and state tax credits.

Gordon frequently lectures on Opportunity Zones, NMTCs, and HTCs for organizations such as IPED, NH&RA, ALI-ABA, ICMA, ICSC, Bisnow, the National Trust for Historic Preservation, the National Council of SHPOs, the State Bar of Michigan, CEDAM, the Michigan Historic Preservation Network, and Heritage Ohio.



Sharon M. Welhouse

Sharon Welhouse joined Ryan, LLC in 2004 and is the Practice Leader of the National Credits & Incentives Practice. She is responsible for expanding the Credits & Incentives service lines while ensuring exceptional client service is maintained for every engagement. Sharon manages an estimated 53 Credits and Incentives professionals that provide Ryan's clients with services for maximizing all incentives available.



Eric Haar

Eric Haar serves as Director of Government and Industry Relations for the Federal Home Loan Bank of Dallas. Mr. Haar is responsible for the bank's legislative and regulatory initiatives, and he communicates information about the bank's many grant programs to various stakeholder groups. Mr. Haar served in a similar capacity for ten years at the Federal Home Loan Bank of Topeka.



Cory Older

Cory Older is the President of River City Capital Partners (RCCP). RCCP is the Co-Developer for Urban East, one of the largest mixed-use opportunity zone projects in Austin. Urban East, located at 6400 East Riverside (approximately 1.75 miles from Oracle's new cloud computing campus) is a 438,000 square foot mixed used development consisting of 384 market rate apartments, 100,000 square feet of Class A office space, 20,000 square feet for retail and restaurants with two parking garages. The project is slated to break ground July 1, 2019.



Peter Braster

Peter Braster has served as the City of Plano's Director of Special Projects since 2015. Located in the Office of the City Manager, the Special Projects position bridges economic development and real estate development in Plano, with the goal to find and add value in each special project, keeping Plano the city of excellence.

Mr. Braster will lead Plano's effort to develop 40-acres of city owned land surrounding the Plano Event Center, Plano's 86,400 square foot event space located in Collin County's sole Opportunity Zone.

In addition to his activities in Plano's Opportunity Zone, Mr. Braster oversees the ongoing redevelopment of Downtown Plano; is the ombudsman for special projects that include Legacy West, and the Cotton Belt Regional Rail Corridor Project, and leads the City's retail redevelopment program – the first project being the Collin Creek Mall.

Mr. Braster has over 30 years of public and private experience. He began his career in civil engineering by working on large transportation projects including several highway, airport, and light rail systems in New York and California. Peter is a member of the Urban Land Institute, the North Texas Urban Land Institute TOD Product Council, and the International Economic Development Council.



Brett S. Ellen

Brett S. Ellen, CFP® is the Founder, President and Chief Executive Officer of American Financial Network (AFN), an independent financial solutions firm dedicated to serving individuals and corporate clients across North America in the areas of financial planning, wealth management, risk management, and corporate services from entity structure to exit planning along with collaboration from an elite network of best-in-class tax, legal and banking professional services providers known as AFN's Financial Solutions Alliance.

Brett has been regarded as a visionary leader in the financial industry for more than three decades. As an independent company, American Financial Network has grown to support both individual and corporate clients. Brett and the professional advisors at AFN establish comprehensive financial plans focusing on key areas such as retirement, education and estate planning in addition to tax strategies and insurance. Corporate clients rely on AFN for compensation and benefit planning solutions including qualified 401K and profit-sharing plans, deferred compensation, executive bonus plans, captive insurance, and exit strategies.

Brett sits on the advisory board of the NHL's Los Angeles Kings and is an active member with Business Forums International in addition to his own business group, the Financial Solutions Alliance. Brett has supported charities such as the American Cancer Society, Big Brothers and the Muscular Dystrophy Association. Along with his wife and two youngest sons, he founded TurnKindnessOn.org, a non-profit that fosters community involvement and social responsibility in young children. Blending his love of coaching and financial expertise, he is also known as the Kids Finance Coach, where through live appearances and multimedia platforms, he teaches kids how to save, invest, donate, and spend. Brett received the prestigious Humanitarian Award from the MDA and was presented with The Community Leadership Award in Mentoring Excellence from Investment News Magazine.



Debbie A. Klis

Debbie Klis has a broad financial practice focused on securities and private fund formation including opportunity zone funds and syndications, venture capital funds, hedge funds, private equity funds, real estate funds and syndications, EB-5 funds, and international master-feeder funds. Debbie is a frequent speaker and author regarding private equity, fund formation, crowdfunding and related securities matters. Debbie's experience includes structuring successful debt and equity investments coupling multiple sources of investing including private equity, EB-5 financing, public financing, HUD mortgage loans, Low Income Housing Tax Credits, federal/state historic tax credits, New Market Tax Credits, revenue bonds, tax-exempt bonds, energy tax credits and crowdfunding. Debbie is part of Polsinelli's multidisciplinary team of fund, real estate, tax and securities attorneys representing developers, fund sponsors and businesses and investors regarding opportunity zone funds. Debbie is a member of the American Bar Association's Broker-Dealer Subcommittee and Investment Adviser Subcommittee and utilizes her LL.M. in tax on structuring matters.



Michael C. Kressig

Michael Kressig is a partner in the St. Louis office of Novogradac & Company LLP, where he specializes in the opportunity zone incentive, the historic rehabilitation tax credit (HTC), the new markets tax credit (NMTC) and the low-income housing credit (LIHTC). He has more than 25 years of public accounting and business advisory experience, including extensive experience assisting developer, syndicator, CDE and investor clients with complex financial, syndication and investment structuring including the use of tax incentivized financing. His consulting expertise includes financial modeling and projections, deal structuring and related services. Mr. Kressig is currently assisting qualified opportunity fund sponsors in the newly emerging area of opportunity zone investing. His opportunity zone expertise includes fund structuring, financial modeling and projections, developing compliance due diligence and asset management policies and procedures, and evaluating and structuring real estate and operating business portfolio investments with consideration toward OZ requirements. Mr. Kressig also works extensively with real estate partnership and compliance audits and advises clients on accounting, tax and regulatory issues. He is a frequent contributor to Novogradac's Tax Credit Journal and a regular speaker at industry events. Prior to joining Novogradac & Company LLP in 2012, Mr. Kressig directed the assurance services

and real estate services practice groups at Sabino & Company. Mr. Kressig also served as a senior manager with Deloitte LLP, where he specialized in the financial services industry as well as merger and acquisition consulting and due diligence.



Michael D. Graham

Michael Graham has 30 years of land development experience and has developed several thousand residential lots in Colorado. Sebastian Partners is currently developing a project in a Qualified Opportunity Zone (QOZ) in Aurora, CO called Avelon. Avelon is the ideal QOZ project as it has multiple opportunities for QOZ investments. The 287-acre community will result in 1,100 single-family homes, 400+ multi-family units and 40 acres of commercial that will include 3 hotels, Class A office space, retail, restaurants and an entertainment center with an 8,000-seat amphitheater. Sebastian Partners has established the Gravitas QOZ Fund which currently raising over \$200 million in equity to fund the project.

Michael is experienced with the process in Aurora, having developed Singletree, on 56th Avenue one mile west of the Project. Singletree had over 400 single-family homes, and 80 acres of residential multi-family finished and delivered and included 40 acres of airport parking and a transportation facility. Mr. Graham's other Front Range/Colorado projects include Ken Caryl Ranch, Castle Pines/Lynx Land Daniels Gate, Whisper Canyon, Brookfield Park, and Cimarron Subdivision. He also developed other master-planned projects throughout Colorado and has extensive luxury resort development experience, including in Cabo San Lucas and Lake Tahoe.



Donny Lucaj

Donny Lucaj has work in the accounting profession since 2006. He started his career in corporate accounting then joined Plante Moran in 2012. As a Senior Manager of Plante Moran's Housing and Community Development Solutions Group, he specializes in real estate development projects involving tax incentives such as Opportunity Zones, New Markets Tax Credits, and Historic Tax Credits. Additionally, Donny aids clients in identifying research and development credits and qualified business income deductions. He has worked with clients in diverse industries, including real estate, manufacturing, software development and technology, pharmaceutical, and chemical. He's member of

the American Institute of Certified Public Accountants and Michigan Association of Certified Public Accountants. Donny has received his B.A. in finance from Michigan State University, followed by my M.B.A. in accounting from Walsh College.



Stacy D. Wages

Stacy Wages is a Senior Manager in the Global Location Investment, Credits and Incentives practice Ernst & Young LLP in Dallas, Texas. Stacy has ten plus years of experience in location investment and credits and incentives services. She currently serves as a Texas and Colorado incentives and credits subject matter professional for EY's state tax desk network, spending time advising clients across the globe on the Texas and Colorado site selection and incentives process.

Stacy has managed numerous location advisory and incentives projects for companies in a variety of industries including manufacturing, retail, energy, telecommunications, information technology and healthcare. She has assisted companies with conducting economic impact studies and obtaining federal, state and local incentives such as capital investment tax credits, job creation tax credits, location based incentives, real and personal property tax abatements, sales and use tax refunds, and cash grants.



Christine Brynaert

Christine Brynaert has over eight years of professional experience in public accounting, including state and federal tax areas such as Credits & Incentives, Audit Defense, Controversy, and Tax Return Preparation. Since 2013, she has primarily advised clients in federal tax credit structuring and syndication for the New Markets Tax Credit Program, Renewable Energy Tax Credits, Family Medical Leave Credit, and Disaster Relief Retention Credits. Christine currently spends the majority of her time assisting with leading Deloitte's Qualified Opportunity Zone and New Markets Tax Credit programs.



Stefan Schimenes

Stefan Schimenes is the CEO and founder of InvestReal, a data-driven real estate marketplace that connects developers looking to raise capital for Opportunity Zone projects with investors. The platform also has a robust data analytics component, and utilizes machine learning to help users with research and informed decision making.

Often referred to as a serial entrepreneur, Stefan has a passion for reinvigorating static industries with technology. He has founded several successful startups in Latin America and the US. Additionally, Stefan is no stranger to the concept of disrupting real estate through online marketplaces. When he was the Managing Director of Airbnb in Latin America, he catapulted the company from an unknown brand to the market leader in the region's hospitality industry. His efforts were integral to helping Airbnb becoming one of the most valuable startups in the world, worth an estimated \$31B.

Stefan earned his BA in International Relations from Fundação Armando Alvares Penteado, and an MBA from Fundação Dom Cabral. In his personal time, Stefan works to impact social good on both a local and global scale. He is an active volunteer at his community church and has participated in relief projects in Africa and South America.



Eric J. Kim

Eric Kim is the Chief Operating Officer of InvestReal, a data-driven real estate marketplace connecting investors with developers in Qualified Opportunity Zone projects, supported by artificial intelligence. The platform allows accredited investors to evaluate listed QOZ projects with standardized and transparent metrics, and invest at the project level with the developer partner to mitigate the inefficiency of blind pool funds and crowdfunding models. Eric has 17 years of experience in operations, capital markets, investment management and investment banking.

Previously, Eric was Chief Development Officer at True Investments, a single family office where he led its real estate investments division with 1,200 rental assets across 13 states. Prior to joining True Investments, Eric spent 10 years in investment banking where he originated and executed capital markets, mergers & acquisitions and recapitalization transactions in the Real Estate and Housing

industries, spanning from UBS, Lehman Brothers, KBW and Zelman. Over the course of his investment banking career, Eric worked on a wide range of transactions with an aggregate transaction value of over \$15 billion. Prior to investment banking, Eric spent four years in investment management at BlackRock and Merrill Lynch's joint venture.

Eric is involved in numerous charities and previously served on the Young Leadership Council at the Boys & Girls Harbor of Harlem, and has been involved with Restore NYC and Big Brothers Big Sisters of OC.



Beth Van Duyne

Beth Van Duyne is the Regional Administrator for the Region VI (Arkansas, Louisiana, New Mexico, Oklahoma and Texas) of the U.S. Department of Housing and Urban Development. Before joining the Administration, Beth was Mayor of the City of Irving, having served as a city council representative from 2004-2010. She has done extensive coalition building among local, state and federal officials throughout the country with the US Conference of Mayors, National League of Cities, Texas Municipal League and North Central Texas Council of Governments.

Throughout her 25 year career, she has had the opportunity to work with small startup companies, mid-size private companies and Fortune 500 corporations like Verizon, American Airlines and SAP. She also ran her own consulting business, working with executives to develop strategic business plans, negotiation strategies, grassroots coalition building and federal and state legislative policy strategies. A frequently interviewed official, Beth has appeared in The New York Times, CNN, USA Today, Fox News and ESPN.

Concurrent with her municipal responsibilities, Beth was a member of the US Conference of Mayors Advisory Board, Community Leaders of America Texas Chair, the North Central Texas Council of Governments, past member of the Dallas/Fort Worth International Airport Board and is a Hatton Sumners Foundation trustee. She was a board member of the Irving Housing Finance Corporation Board from 2007-10 and Chaired from 2011-15. Beth also chairs the Economic Development Advisory Council and serves on the Executive Boards of both the North Texas Commission and the Irving-Las Colinas Chamber of Commerce.

Beth is the recipient of the 2016 National Security Patriot Award, 2016 Alain Bellet Award, 2016 Great Women of Texas Award, 2015 Community Bridge Award and the 2015 Defender of Freedom Award.