



**Conference Hosts:**

**New Orleans Redevelopment Authority and the Valued Advisor Fund**

**Conference Details:** Organized as Workshops, \$75 for 1 workshop; \$150 for 2-4 workshops – Reception included in cost of workshop(s). **Register** at [www.valuedadvisorfund.com](http://www.valuedadvisorfund.com)

**Chateau Sonesta:** 504-586-0800 – block rate \$149 through **April 5<sup>th</sup>**  
800 Iberville Street, New Orleans, LA 70112

Sessions:

**New Markets Tax Credit Primer:** 10:00a.m-12:30p.m. May 6<sup>th</sup>

**Sponsored by: US Bank CDC and the Reznick Group**

This interactive session will provide a complete overview of the New Markets Tax Credit program, including hands on case studies. Marc Hirshman of US Bank, the leading investor in New Markets Tax Credits and Gary Perlow of the Reznick Group, a national leader in services to CDEs and developers, will lead this dynamic session. Other participants will include allocatee and developer panelists with experiences in completing transactions of varying size and type. The session is designed to provide insight to both beginning practitioners and to experienced industry professionals on the use of the program and the state of the market today.

**Creating Impact-Funding Business and Mixed-Use Property:** 2:00-4:30 p.m. May 6<sup>th</sup>

**Sponsored by:**

**Community Reinvestment Fund and Local Initiatives Support Corporation**

This workshop is designed to highlight the effectiveness of serving the needs of communities and creating broad levels of impact by funding businesses and mixed-use properties. It will consider options in funding and methodologies for measuring and benchmarking community impact. Whether you are a CDE interested in understanding how these projects are reviewed and funded, or a developer/business seeking funding, this workshop will provide valuable insights on accessing and utilizing funding streams. Frank Altman of the Community Reinvestment Fund, known nationwide for the innovative business finance programs and Robert Poznanski of the Local Initiatives Support Corporation's NMTC program will guide attendees through a myriad of options and opportunities for creating substantial impact. Joining these distinguished moderators will be Sean Zielenbach, a noted community development specialist with many years of experience working with CDCs, CDFIs, and NMTC allocatees on issues of strategic planning, program development, and impact evaluation and Michael P. Ross, a partner, with Virchow Krause & Company, LLP - the 15<sup>th</sup> largest CPA firm in the nation. Mr. Ross is part of a team of nationwide service leaders with experience in NMTC application support and transaction closing services.



**Event Reception:** 5:30 – 7:00 p.m. – Preservation Hall

**Sponsored by:** Capmark Finance Group

**Keynote Speaker:** *Director Donna Gambrell of the Community Development Financial Institutions Fund.*

Hors d'oeuvres, desserts and drinks provided during this special networking time. A highlight of the evening will be our special keynote speaker, who brings a wealth of experience and enthusiasm to her new post at the CDFI Fund. Ms. Gambrell's insights on the industry, gleaned from her extensive experience are providing opportunities for new data access and shared information that will greatly expand the industry's capacity to self-monitor and understand the impacts it truly creates. The Community Impact "Right Stuff" Awards will also be presented at this event. Please submit your best practice for publication and consideration for the award to:

[Tpreston-koenig@valuedadvisorfund.com](mailto:Tpreston-koenig@valuedadvisorfund.com)

**Creating Value through Renewable Energy and Going Green:**

10:00 a.m. – 12:30 p.m. – May 7<sup>th</sup>

**Sponsored by:** Recycled Energy Development, Nixon Peabody and Urban Action Community Development CDE

Our nation, and indeed our world, is facing the steady decline of non-renewable resources and the impact of the use of these resources on our environment and our economy. This workshop will look at new and innovative ways to utilize renewable energy resources and capture the advantages of building with "green" technology. It will also focus on the types of resources available to fund these endeavors and what makes them attractive to the resource providers. Aaron Walters of Recycled Energy Development a pioneer in renewable energy alternatives is joined by a leading "green" neighborhood transformation CDE, represented by Joseph Summers and by Herb Stevens of Nixon Peabody, widely recognized as the foremost legal resource in both renewable energy and "green" funding opportunities. Also joining this group is a CDE widely known for using its allocation to fund renewable opportunities. This workshop will help entities and persons interested in attracting resources to fund their renewable and green activities and CDEs interested in understanding what drives the impacts that makes these opportunities important community development projects.

**Economic Development Best Practices:** 2:00-4:30 p.m. May 7<sup>th</sup>

**Sponsored by:** Community Development Capital, CDFI and NAI LatterBlum

This session will feature highly regarded CDE's and CDFI's from around the nation who will provide information regarding their successful implementation of economic development practices. These activities have lead to high impact, measurable differences in the communities that they serve and provide a base for interactive discussion on where the industry is going and what it will take to succeed as we move forward together to serve our highest need communities. Invited speakers include but are not limited to: William Bynum of Enterprise Corporation of the Delta, Kermit Billups of Capmark Finance Group, and William Bay of Impact Seven.