2017 MIDYEAR MEETING
Strengthening Rural Housing With Valued Partnerships

January 23-25, 2017
The Ritz-Carlton, Sarasota
Sarasota, Florida

Council for Affordable and Rural Housing, 116 S. Fayette Street, Alexandria, VA 22314
T: 703-837-9001  F: 703-837-8467
email: carh@carh.org, website: www.carh.org
The CARH 2017 Midyear Meeting
Strengthening Rural Housing With Valued Partnerships
January 23-25, 2017   |   The Ritz-Carlton, Sarasota, Florida

The Council for Affordable and Rural Housing (CARH) Midyear Meeting will take place on Monday, January 23 through Wednesday, January 25, 2017, at the Ritz-Carlton, Sarasota in Sarasota, Florida. CARH meetings are considered the industry’s premier affordable rural housing conferences. Your attendance will be critical at the CARH 2017 Midyear Meeting, in light of the significant changes in Washington, DC, after the highly charged Presidential and Congressional elections. As always, leading industry experts will present the latest information and trends that impact your business. Educational sessions will be based on the meeting theme, “Strengthening Rural Housing With Valued Partnerships.”

The meeting will take place within days of Inauguration Day and shortly after the 115th Congress convenes. Be the first to hear from CARH Washington experts on how the new players and leadership in the Trump Administration will impact the affordable rural housing industry. Hear the latest information on how the new Congress is poised to respond to various proposals and initiatives that will come from the Administration. These are expected to include infrastructure proposals, tax reform vis-à-vis the housing credit and housing bond programs and other issues that will impact the affordable rural housing industry. We’ll review tax reform discussions and how they are already being viewed by industry participants, as well as strategies for bringing transactions to closing.

CARH will present the prestigious Harry L. Tomlinson, State Affiliated Association of the Year, and Member of the Year Awards. Be there to help recognize and celebrate your colleagues who have excelled in the affordable housing industry by moving our objectives forward through their achievements and determination.

The CARH standing committees will also convene. This is your opportunity to discuss issues important to you for CARH to advance through its legislative work, or benefits and services you would like CARH to offer the membership. CARH is your association and you have a voice. Let us know where you want CARH to focus our greatest efforts, to provide you with the necessary tools to increase the efficiency of your business. You will also have time to meet and greet the loyal vendors and service providers who offer goods and services to the industry, often at a discount.

Take a break from winter and enjoy Sarasota on the stunning Gulf of Mexico. Known for sugar-sand beaches, casual elegance and gorgeous Spanish-style architecture, Sarasota was built around its most famous residents, the Ringling Family. This well-known circus family heavily invested in the community, and built fine art museums, hotels and the famous Ringling School of Art and Design. The Ringling legacy continues to attract visitors from all over the world. From enjoying the beach and other outdoor activities, to the many cultural opportunities available, Sarasota has something for everyone. For more information on the Sarasota area, please visit the official website, www.visitsarasota.org.

The Ritz-Carlton, Sarasota is situated on 11 acres near the center of downtown, where you will be within walking distance of cultural and performance venues. Enjoy the tranquility of the beach at the hotel’s Beach Club located on Lido Key just three miles away. Tuesday’s reception will be held at the Beach Club, allowing attendees to walk the beach and experience a Florida sunset at a spectacular location! Tennis courts, a golf course and a full service spa round out all that the hotel offers. For more information on The Ritz-Carlton, Sarasota, please visit www.ritzcarlton.com/en/hotels/florida/sarasota.
Monday, January 23, 2017

8:30 a.m.-4:00 p.m.
Registration Open

8:30 a.m.-5:30 p.m.
Committee Meetings—All attendees are welcome to attend the committee meetings.

8:30-9:30 a.m.
Best Practices and Education Committee
This joint committee will continue its efforts to increase educational opportunities for the affordable rural housing industry. Expanding and marketing CARH’s designation program will be discussed. Continued development of best practices for onsite managers and maintenance personnel will also be explored, including new best practice forms to be added to the CARH website. The committee should be prepared to recommend its top priority issues for action to the CARH Board of Directors.

9:45-10:45 a.m.
State Association Committee
The committee will continue to review formation of CARH affiliated state associations in areas of the country currently not served. The nuts and bolts of organizing state meetings and conferences, including formats of meetings, recommended speakers and determining various session topics will also be reviewed. Social media options will be discussed vis-à-vis the promotion of CARH and the state associations, as well as the affordable housing industry as a whole. The importance of grass-roots advocacy will also be examined and how this advocacy supports CARH efforts at the national legislative level. The committee should be prepared to recommend its top issues for action to the CARH Board of Directors.

10:45 a.m.-12:00 p.m.
Management Committee
The committee will cover the myriad of issues facing management companies today. Discussion will center on how the new Administration will address many of the regulatory issues impacting housing programs administered by both the Department of Housing and Urban Development (HUD) and the United States Department of Agriculture (USDA) Rural Development (RD). Current management policies will be thoroughly reviewed by new agency heads. It will be essential that any changes reflect the business needs of management companies and continue to provide the necessary resources that will allow these companies to deliver affordable housing to residents in rural communities throughout the country. Officials from the national RD office will be available to discuss a variety of servicing issues via teleconference during the committee meeting. Management fees, income verification, budgeting, rental assistance concerns, including the agency’s rent incentives pilot will be examined. The committee should be prepared to recommend its top issues for action to the CARH Board of Directors.

Council for Affordable and Rural Housing
116 S. Fayette Street, Alexandria, VA 22314 • T: 703.837.9001 • F: 703.837.8467 • email: carh@carh.org, website: www.carh.org
12:15-2:15 p.m.
Opening Luncheon and Breaking News from Washington: Insight Into the New Administration and Congress
CARH’s Washington, DC experts will discuss how the new Administration and the 115th Congress will impact the affordable and rural housing industry during the upcoming year. New faces in Washington will mean new policies and procedures for how the federal government’s programs will operate. Our experts will give attendees some insight into who the new players are and how they will impact both long-term and short-term housing and tax policies. Congress’ priorities will also be outlined and examined, including how will they be measured beside the new Administration’s priorities. Discussion will also center on how CARH and the affordable housing industry should respond so that our concerns are heard during this volatile time. Legislation that potentially could provide money for our country’s infrastructure could move through Congress in the first part of the year. Find out how CARH members can relay to their members of Congress that housing is part of the country’s infrastructure and should be included as part of those efforts. The meeting exhibitors, whose companies supply goods and services to rural housing providers, will also join us at this luncheon where they will have the opportunity to give a short presentation on their company and products.

2:30-4:00 p.m.
Development and Owner Committees
This joint committee meeting of the developers and owners will discuss the various transactional issues impacting both segments of the industry. Even the idea of tax reform legislation being considered in the new Congress has impacted the investment community and investment in current transactions. How are the various players in the development and investment industry addressing concerns so that transactions can go forward? The Continuing Resolution for the Fiscal Year (FY) 2017 budget of the federal government will be reviewed and its impact on many RD programs, including those used for preservation. The new data tool being used by RD has changed how the agency is approaching the maturing mortgage issue. Owners of older properties seem to be seeing more and more tax issues arise. Some of these issues will be discussed as well as how owners are responding. The committee will review if the response of the agency mirrors how borrowers are viewing the issue. Status of the “duty to serve” rule for the Government Sponsored Enterprises (GSE) will be analyzed. The committee will also review preliminary data from the states on usage of funds from the National Housing Trust fund. The committee should be prepared to recommend its top issues for action to the CARH Board of Directors.

4:00-4:15 p.m.
Break with Exhibitors

4:15-5:30 p.m.
Board of Directors Meeting
All attendees are invited.

6:00-7:30 p.m.
Networking Reception at Ritz Carlton Hotel
After a day of committee meetings, enjoy time to network with your colleagues at one of the hotel’s lovely reception venues overlooking Sarasota Bay.

Dinner on Your Own

Tuesday, January 24, 2017

7:30 a.m.-12:00 p.m. - Registration Open

7:45-10:00 a.m.
General Sessions

7:45-9:00 a.m.
Continental Breakfast and Regulators In Transition
Cabinet appointments for most agencies have been made and confirmation hearings will have begun for the Cabinet Secretaries. However, the majority of deputies in the agencies that impact the affordable rural housing industry have not yet been appointed. Career employees are essentially carrying on existing policies until appointments are made or, in some instances, nominations are confirmed by the Senate. Attendees will have the opportunity to hear from and discuss with transition officials, current programs and policies, while beginning a dialogue that will potentially lead to changes and improvements in programs.
9:00-10:00 a.m.
**Housing Credit and Housing Bond Programs—Today, Tomorrow and the Future**
Investment in affordable housing is in a transition mode. Even the mere discussion of tax reform has begun to impact the Housing Credit and Housing Bond programs. All eyes are on Congress and the new Administration as we weigh proposals and timing of potential changes to the tax code. This discussion is vital for the affordable rural housing industry, as both preservation and new construction rely heavily on the credit and bond programs and are the backbone of transactions today. This panel will analyze today’s markets and look into their crystal balls as they prepare for 2017 and what tomorrow’s transactions may look like going forward.

10:00-10:15 a.m.
**Break with Exhibitors**

10:15 a.m.-12:30 p.m.
**Concurrent Sessions**

10:15-11:30 a.m.
**The New Overtime Rule: How to Respond and Comply**
On December 1, the Department of Labor’s new overtime regulations were scheduled to go into effect. These were intended to make millions more employees eligible for overtime pay. The regulation would have raised the Fair Labor Standards Act (FLSA) salary threshold for exemption from overtime pay, from $23,660 to $47,476. A federal judge in Texas has blocked the new federal overtime rule. This panel will provide attendees with an overview of the regulation and review certain areas of the existing Fair Labor Standards Act. We’ll identify how your companies could be impacted by the new regulation should the judge’s ruling be overturned or modified.

OR

11:30 a.m.-12:30 p.m.
**Concurrent Sessions**

11:15-12:30 a.m.
**Twitter and Facebook: The New Constituent Letter**
The Presidential and Congressional elections taught us most elected officials are communicating with their constituents via social media. At the same time, their constituents can publicly react to issues quickly with the same tools. It’s important that our industry convey concerns on issues quickly. These experts will teach you how to use social media to tell rural housing’s story, why funding must be increased and tax reform should include the Housing Credit and Housing Bond programs. Make sure you bring your mobile phone. You’ll be sending live Tweets and posting to your Congressional member’s Facebook page in the session!

OR

**What to do When “Failure” Comes into the Equation**
The complexity of putting together all of the moving parts of an affordable housing transaction offers ample opportunity for trial and error, particularly in this volatile and uncertain market. Our panel of experts will weigh in to openly discuss some of their greatest FAILURES and what they learned during the development, construction and financing processes. Attendees will leave this session with battle-tested solutions as a result of lessons learned from their experienced colleagues.

12:30-2:00 p.m.
**Awards Luncheon**
CARH will present its three prestigious awards: the Harry L. Tomlinson, the Member of the Year and the State Affiliated Association of the Year Awards. Join us as we honor your colleagues for their achievement and dedication!
2:15-3:30 p.m.
**General Session**
Accessibility on Your Properties: How to Meet Your Responsibilities While Understanding Your Liability
As you plan for new construction and rehab of multifamily properties in 2017, everyone on your team must understand accessibility requirements and what to look for in both the design and construction stage of your projects. A noncompliant design or an ill-advised decision by the construction team could result in an accessibility violation and lawsuit. This session will help developers, owners, contractors, architects, and syndicators, who all have a role in ensuring compliance, understand the various accessibility requirements and how to reduce exposure to accessibility lawsuits.

3:30-5:30 p.m.
**Free Time to Explore the Sarasota Area**
Take advantage of the beautiful city of Sarasota on Florida’s Gulf Coast. It was once the winter home of the famous Ringling Brothers Circus, and today boasts numerous cultural, historic, entertainment and educational attractions. The Ringling Museum of Art features old masters and modern art. The Sarasota Jungle Gardens are composed of ten acres of botanical plantings, plus bird and animal shows. The unique Marie Selby Botanical Gardens and the Mote Marine Laboratory and Aquarium are both top-rated attractions. The city is also the gateway to the sugar-sand beaches of Siesta Beach on Siesta Key, and Lido Beach. Two stunning state parks and a state forest offer many opportunities for hiking, birding, fishing and other outdoor activities. For more information on the Sarasota area, please visit the official website, [www.visitsarasota.org](http://www.visitsarasota.org).

5:30-7:00 p.m.
**Networking Reception at The Ritz-Carlton, Sarasota Beach Club**
After a long day of educational sessions, it will be time to socialize with your colleagues at The Ritz-Carlton, Sarasota Beach Club. Enjoy the beautiful white sand beaches of Lido Key, with a view of the Gulf of Mexico. Experience a Florida sunset from the best location in Sarasota. While at the Beach Club, don’t miss the historic and rustic Lido Key Tiki Bar, a Sarasota landmark. After the reception, you might want to head on over to St. Armands Circle, for shopping as well as a host of dining options. For more information, please visit [www.starmandscircleassoc.com](http://www.starmandscircleassoc.com).

**Dinner on Your Own**

**Wednesday, January 25, 2017**

8:45 a.m.-12:00 p.m. - Registration Open

8:45-9:15 a.m. - Continental Breakfast with Exhibitors

9:15 a.m.-12:00 p.m. - General Sessions

9:15-10:30 a.m. **Regulatory Issues Impacting Partnership Interests**
The Internal Revenue Service (IRS) has recently issued regulations addressing disguised sales of property involving partnerships, the allocation of partnership liabilities as well as other issues related to partnership taxation. The regulations are largely intended to eliminate what the IRS sees as abuses of some of the tax benefits associated with partnerships and pass-through entities. This panel will review these regulations, and other tax-related issues, that owners and developers should be concerned with in these changing times.

10:30-10:45 a.m. - **Break with Exhibitors**

10:45 a.m.-12:00 p.m. **Catchall Preservation Roundtable**
Attendees will discuss transactions based on RD’s current preservation policies. Funding issues will be outlined based on FY 2017 funding and beyond. Recommendations going forward based on information received from sessions during the last two days, will also be part of the discussion, with plans to relay these recommendations to the new Rural Development Undersecretary and Administrator.

12:00 p.m. - **Meeting Concludes**
Featured Speakers

Hon. Tom Reynolds
Nixon Peabody, LLP
Washington, DC

Katie Alitz
Boston Capital
Boston, MA

Don Beaty
The Summit Group
Seattle, WA

Mitch Copman
Streamroll, LLC
Cumming, GA

Daniel Duda
Churchill Stateside Group LLC
Clearwater, FL

Tanya Eastwood
Greystone Affordable Housing Initiatives, LLC
Raleigh, NC

Will Eckstein
Greystone Affordable Housing Initiatives, LLC
Raleigh, NC

Mark English
E&A Team, Inc.
Tuscaloosa, AL

Todd Fentress
Clark Schaefer Hackett
Columbus, OH

Colleen Flynn
Johnson, Pope, Bokor, Ruppel & Burns, LLP
Clearwater, FL

Tom Flynn
Flynn Management Corporation
Clearwater, FL

Garrick L. Gibson
Tidwell Group
Austin, TX

Robert Hall
Bonneville Multifamily Capital
Salt Lake City, UT

Bryan Hooper*
Deputy Administrator, Multifamily Housing
USDA/Rural Development
Washington, DC

John Kircher
Ohio Capital Corporation
Columbus, OH

Liam McGuigan*
Coventry Capital Group, LLC
King of Prussia, PA

David Layfield
ApartmentSmart.com
Salisbury, MD

Scott Moore
Baird Holm, LLP
Omaha, NE

Bob Moss
CohnReznick LLP
Boston, MA

Kent Neumann
Eichner Norris & Neumann, PLLC
Washington, DC

Chris Potterpin
PK Housing & Management
Okemos, MI

Richard Michael Price, Esq.
Nixon Peabody, LLP
Washington, DC

Monica Hilton Sussman, Esq.
Nixon Peabody, LLP
Washington, DC

Erica Vernon, CPA
Bernard Robinson & Company, LLP
Greensboro, NC

Kurt Wallace*
Wallace Architects
Columbia, MO

* = invited
**REGISTRATION FORM**

**Council for Affordable and Rural Housing**

**2017 Midyear Meeting**

Monday, January 23 - Wednesday, January 25

Ritz Carlton • Sarasota • Florida

<table>
<thead>
<tr>
<th>Name -- (Please complete one form for EACH registered attendee)</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company/Organization</td>
<td></td>
</tr>
<tr>
<td>Street Address</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State</td>
</tr>
<tr>
<td>Telephone</td>
<td>Fax</td>
</tr>
<tr>
<td>E-mail</td>
<td>Website</td>
</tr>
</tbody>
</table>

| Guest(s) Name(s) |

| How would you best describe your company? |
| --- | --- |
| ☐ Developer | ☐ Manager | ☐ Owner | ☐ Syndicator/Equity Financier |
| ☐ Vendor/Supplier | ☐ CARH State Affiliated Association Executive | ☐ Other (please describe) |

| REGISTRATION FEES |

| Advisory Trustee (first registration free): |
| 2 or more attendees (per person) | $650 |
| Associate Plus (first registration free): |
| 2 or more attendees (per person) | $710 |
| Basic Plus Member: |
| 1 or 2 attendees (per person) | $770 |
| 3 or more attendees (per person) | $730 |
| Associate or Basic Member: |
| 1 or 2 attendees (per person) | $820 |
| 3 or more attendees (per person) | $780 |
| State Affiliated Assn. Member: |
| 1 or 2 attendees (per person) | $860 |
| 3 or more attendees (per person) | $820 |
| Exhibitor’s Table + 1 Member Attendee: |
| Each additional exhibitor attendee | $780 |
| Non-Member: |
| 1-2 attendees (per person) (non-exhibitor) | $1,100 |
| 3 or more attendees (per person) | $1,000 |
| Exhibitor’s Table + 1 attendee | $1,600 |
| Each additional exhibitor attendee | $900 |
| Government Employee: | $610 |

| Additional Guest Registration Fees: |

| Monday, January 23 - Opening Reception | $75 |
| Tuesday, January 24 - Reception at The Beach Club • Ritz Carlton (Receptions included in registration fee. Complete section only if additional guests are attending reception(s).) | $85 |

| TOTAL |

| To pay by credit card, complete the following: |
| ☐ American Express | ☐ Visa | ☐ MasterCard | ☐ Discover | ☐ Diner’s Club |

<table>
<thead>
<tr>
<th>Card Number</th>
<th>Expiration Date</th>
<th>Security Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name as it Appears on Card</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Billing Address</td>
<td>City</td>
<td>State</td>
</tr>
</tbody>
</table>

---

**HOTEL INFORMATION**

CARH’s Midyear Meeting will be held at the Ritz Carlton in Sarasota, Florida. For hotel reservations, please call the hotel directly at (941) 309-2000 and identify yourself as a CARH meeting attendee. Registrants will receive a special rate of $259 per night for single/double occupancy. To receive this rate, you must make your reservations no later than Friday, December 30, 2016.

| CANCELLATION/REFUND POLICY |

Cancellations must be made via email to emarecheau@carh.org. A $35 fee will be charged for registration cancellations received by 5 p.m., Friday, January 6, 2017. $110 will be deducted from cancellations received after that date. Absolutely no refunds will be given after 5 p.m. on Thursday, January 19, 2017, or to registrants who fail to attend the program. An additional $85 will be assessed on all at-door registrations.

To pay by credit card, complete the section below. Or, make check payable to CARH. Send form and payment to:

Council for Affordable and Rural Housing
116 S. Fayette Street
Alexandria, VA 22314
703-837-9001 ~ 703-837-8467 (fax)  
cahr@carh.org • www.carh.org