



**HJ Sims**

Presents the 14th Annual 2017 Late Winter Conference:

Financing Methods and Operating Strategies

in the Senior Living Industry for

Non-Profit and Proprietary Senior Living Providers

**Hyatt Regency | Austin, TX**

**Tuesday, February 28 – Thursday, March 2, 2017**



Please contact **Anita Clavin**: [aclavin@hjsims.com](mailto:aclavin@hjsims.com) | **203.418.9005**

[hjsims.com/register](http://hjsims.com/register)

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# 2017 LATE WINTER CONFERENCE

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**THIS YEAR'S CONFERENCE** will highlight how senior living organizations succeed in today's competitive environment. We have prepared a **COMPREHENSIVE AGENDA** which will address financing methods and operating strategies designed to meet the challenges that exist in both the not-for-profit and for-profit sectors of the senior living industry. A roster of **OUTSTANDING SPEAKERS** will participate in the educational sessions. Breakout sessions, panels and roundtables will provide a forum for exchanging ideas and information. Our Conference format will also provide invaluable **NETWORKING OPPORTUNITIES**.

The objective of the Sims Late Winter Conference is for industry participants to learn and discuss each other's strategies and solutions for success. We are pleased to be able to offer both CEU and CPE credits for the educational sessions.



## HYATT REGENCY AUSTIN

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Our 2017 Conference will take place at the Hyatt Regency, a luxury downtown hotel on Lady Bird Lake. Bicycles and small boats are available at the hotel, and the Hike and Bike trail is nearby. Also nearby you may spot the nightly Flight of the Bats from the Congress Avenue Bridge. We have obtained a special room rate of \$239 per night.

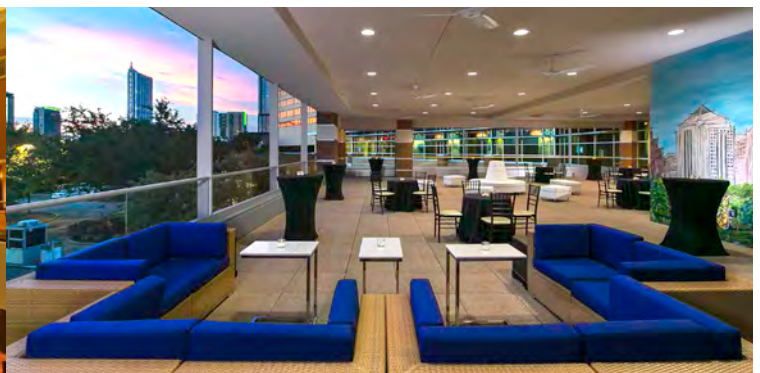
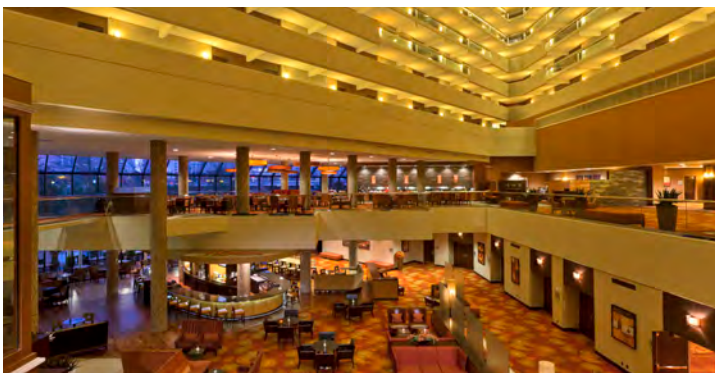
## SPECIAL GUEST SPEAKERS

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**SCOTT WILCOX, Chief Innovation Officer for the South by Southwest Conference & Festivals.** South by Southwest is one of the largest events of its kind in the world, featuring a conference that covers a variety of topics through the lens of tech and culture. Scott will highlight the latest technology innovations that may find their way to senior living communities in the near future.

**DR. FRED BEACH** We welcome back Dr. Fred Beach, who wowed us all in 2012 with his energy market presentation. He will update us on his predictions for the costs and availability of different energy sources including alternatives. Dr. Beach has particular expertise in clean and renewable energy sources on which he consults for the U.S. Defense Department.

**DR. EHUD RONN, a Stanford PhD in Finance,** will discuss financial markets' predictability for those who borrow and invest. He will describe interest rates across maturities around the world and how they can predict future U.S. rates. Dr. Ronn will also demonstrate how to estimate the expected return on the S&P 500 Index, and he will comment on President Trump's effects on the bond and stock markets.



# RECREATIONAL & SPECIAL ACTIVITIES

Tuesday, February 28

## Golf Tournament

Golf enthusiasts will play at the **Crenshaw Cliffside**, one of four distinct courses at the Omni Barton Creek Resort. It was designed by Austin native, Ben Crenshaw, with wide fairways and large greens.



## Bass Fishing Tournament

For our growing number of fishing fans, we will have boats and transportation to well-stocked **Lake Bastrop**.

## Trap Shooting

Learn to shoot traps from the experts at **Renegade Trailhead** at the Hyatt Regency Lost Pines.

## Tours of Austin

Austin is a fascinating city, and we offer 3 memorable ways to see it:

- 1. THE DUCK TOUR** with land & water amphibious vehicles.
- 2. BICYCLE TOUR** around Lady Bird Lake.
- 3. FOOD TRUCK TOUR** – 3 of Austin’s top food trucks, 1 Texas BBQ stop and 1 dessert stop.



## Opening Night Reception & Dinner

**Hyatt Regency Austin | Tuesday, February 28**

7:00 p.m. Reception – Zilker Terrace and Foyer

8:00 p.m. Dinner – Zilker Ballroom

## Special Evening Event at Brazos Hall

**Wednesday, March 1**

A special dinner with local entertainment will be held at Brazos Hall, a turn-of-the-century warehouse converted to a premier event space in downtown Austin. Brazos Hall is located within a short walk to Austin’s vibrant nightlife.

7:00 p.m. – Reception

8:00 p.m. – Dinner



## CFO Breakfast

**Wednesday, March 1, 7:30 a.m.**

Both Non-Profit and Proprietary CFOs are invited to meet each other and discuss important issues.

# AGENDA: TUESDAY, FEBRUARY 28

All transportation leaves Hyatt Regency Austin at the times shown below.

- 7:00 a.m. ..... **Golf Tournament** on Omni Barton Creek Resort, Crenshaw Cliffside Golf Course
- 7:00 a.m. ..... **Bass Fishing Tournament** Boats and transportation to well-stocked Lake Bastrop
- 9:30 a.m. ..... **Trap Shooting** at Hyatt Lost Pines
- 10:00 a.m. ..... **Austin Duck Tour**
- 10:00 a.m. ..... **Biking Tour** around Lady Bird Lake
- 11:00 a.m. ..... **Food Truck Tour** of Austin
- 4:30 p.m. ..... **Networking** at the Hyatt Regency Austin
- 7:00 p.m. ..... **Opening Night Reception & Dinner** Zilker Terrace & Foyer, then Zilker Ballroom, Hyatt Regency Austin

# WEDNESDAY, MARCH 1

- 7:30 - 8:30 a.m. ..... **For CFOs – A Special Networking Breakfast**  
Both Non-Profit and Proprietary CFOs are invited to meet to discuss important issues. Each breakfast table will be hosted and combine CFOs from both industry segments.  
**Brian Barnes**, Chief Financial Officer/Chief Operating Officer, The Legacy Senior Communities  
**George Morris**, Senior Vice President and Chief Financial Officer, Benchmark Senior Living  
**Amy Harrison**, Chief Financial Officer, The Kendal Corporation
- 7:30 - 8:30 a.m. ..... **Breakfast & Networking**
- 8:40 - 8:50 a.m. ..... **Welcome & Introduction**
- 8:50 - 10:00 a.m. ..... **General Session**  
***The Senior Living Industry & Capital Markets Today & Tomorrow***  
An expert panel will discuss and debate the most efficient, affordable and creative ways to finance development, acquisitions and expansions, including a review of Sims' most interesting past and future financings.  
**William Sims**, Managing Principal, HJ Sims  
**Aaron Rulnick**, Managing Principal, HJ Sims  
**R. Jeffrey Sands**, Managing Principal/General Counsel, HJ Sims  
**Anthony Luzzi**, President, Sims Mortgage Funding
- 10:00 - 10:30 a.m. ..... **Networking Break**
- 10:30 - 11:45 a.m. ..... **General Session**  
***Latest Technological Advances from the South By Southwest Conference***  
**Guest Speaker, SCOTT WILCOX**  
**Chief Innovation Officer, South by Southwest Conference & Festivals**
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- 11:45 a.m. - 1:00 p.m. .... **Lunch & Networking**
- 1:00 - 2:15 p.m. ..... **General Session**  
***Future Price and Availability of Energy***  
**Guest Speaker, FRED C. BEACH, PhD**  
Dr. Beach currently works as an independent researcher and consultant in the fields of Energy, Defense and Government Policy. He has served as a consultant on defense-related topics for the U.S. Chief of Naval Operations Strategic Studies Group, MITRE (JASONS), Naval Research Advisory Committee, Naval Research Laboratory, Defense Advanced Research Projects Agency and the Defense Science Board.
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**2:15-2:45 p.m. Networking Break**

**2:45-3:45 p.m. Breakout Sessions**

***I. Latest Design Concepts for the Next Generation***

As the competition among senior living communities increases, design excellence combined with affordability and efficiency becomes a greater differentiator for sponsors and owners. Hear about the latest design concepts for rental and entrance fee independent living communities as well as assisted living, memory care and nursing facilities from leading architects of our industry.

**David Dillard**, Principal, D2 Architecture

**J. David Hoggund**, Principal, Perkins Eastman

**Greg Huntzman**, President, Pi Architects

**Michael Martin**, Managing Partner, RLPS Architects

***II. The Expansion of Senior Services to Multi-Family Housing***

Senior living residents receiving care in less intensive settings has been an ongoing trend for over a decade. For example, many nursing beds today are occupied by yesterday's acute care patients, and many assisted living facilities are providing care once found only in nursing homes. At the other end of the spectrum, buildings designed as multi-family also provide some services to seniors at a much lower cost than traditional retirement communities. Learn about this evolving trend, its costs, and implications from owners and other industry participants.

**Nichole Doye Battle**, Chief Executive Officer, GEDCO (Govans Ecumenical Development Corporation)

**Michael Comparato**, Chairman, Chief Executive Officer, Vieste, LLC

**John Mehrkens**, Vice President of Project Development, Senior Housing Partners

**William Pettit, Jr.**, President and Chief Operating Officer, R.D. Merrill Co.

**Frank Rockwood**, Co-Founder and President, Rockwood Pacific

**3:45-4:00 p.m. Networking Break**

**4:00-5:00 p.m. Breakout Sessions**

***I. Finding and Motivating Employees***

A major difference between successful and mediocre senior living organizations is the quality of their staffs. With higher minimum wage rates, new overtime regulations and a lower unemployment rate, finding, paying, training and managing front-line workers is increasingly critical. Experienced senior living managers and owners from the non-profit and proprietary industry segments will share their philosophies and programs.

**Andrew Carle**, Chief Operating Officer, Affinity Living Group

**Daniel Reingold**, President and Chief Executive Officer, Riverspring Health

**Robert Syron**, Chief Executive Officer/President, Peconic Landing

**Additional Speaker** TBA

***II. Turnaround Successes***

How do you turn around your community when your assumptions become outmoded and market conditions change? If you have just acquired a community, how can you significantly improve its results quickly? Hear from providers who each faced different, difficult circumstances and managed to overcome these obstacles to achieve success.

**Denise deFiebre**, Vice President, Acquisitions, Senior Care Development

**Lynne Katzman**, Founder and President, Juniper Communities

**Christopher Keysor**, President and Chief Executive Officer, Lenbrook

**Kenneth Young**, Executive VP Planning/Development & General Counsel, United Church Homes

**7:00-10:00 p.m. Special Evening Event at Brazos Hall**

Join us in downtown Austin for a Reception, Dinner and Texas-style Entertainment.



# THURSDAY, MARCH 2

## 7:00 - 8:00 a.m. Breakfast & Networking

## 8:00 - 9:15 a.m. General Session

### *Marketing to a Changing Population*

More sophisticated, more diverse and more demanding are a few of the adjectives describing a new generation of potential senior living residents. A panel of the leading providers and marketing professionals will discuss their latest successful strategies and tactics to increase occupancy of communities in varied locations and price points.

**Liz Bush**, Senior Vice President/Director of Senior Housing Marketing and Sales, LCS

**Patrick Fannon**, Vice President of Sales and Marketing, Liberty Lutheran

**David Smith**, Founder and Chief Executive Officer, One On One Service to Seniors and One on One Sherpa

**J. Craig Statton**, President and Chief Executive Officer, Atherton Baptist Homes

## 9:15 - 10:30 a.m. General Session

### *Let's Hear From the Leaders: Setting Themselves Apart*

Both the Non-Profit and Proprietary segments of the senior living industry have extraordinary leaders. Representatives from both segments will discuss their organizations' leadership in various aspects of our industry.

**David Barnes**, President, Watermark Retirement Communities

**Nick Harshfield**, Chief Financial Officer, Ascension Senior Living

**Jesse Jantzen**, President and Chief Executive Officer, Ascension Health Senior Care

**Adriene Iverson**, President and Chief Executive Officer, Elder Care Alliance

**Benjamin Pearce**, Founder and CEO of EvoLve Senior Living

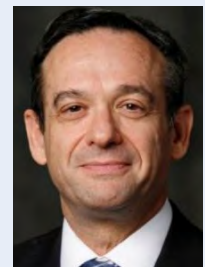
## 10:30 - 11:00 a.m. Networking Break

## 11:00 a.m.- 12:00 p.m. General Session

### *Predicting U.S. Interest Rates and the S&P 500*

#### **Guest Speaker, EHUD I. RONN, PhD**

Ehud I. Ronn is an award-winning professor of Finance at the McCombs School of Business, University of Texas at Austin. Dr. Ronn received his PhD from Stanford University. He has taught at the University of Chicago and the University of California at Berkeley and has worked at Morgan Stanley and Merrill Lynch.



## 12:00 p.m. Lunch & Conclusion of Conference Sessions

Boxed lunches will be provided outside the meeting rooms.

## 1:00 p.m. Tour of Westminster in Downtown Austin

Westminster is a fabulous Life Plan Community in downtown Austin near the University of Texas. Westminster is continually upgrading its physical facilities and services. Join us for a tour and learn how Westminster has been a successful pioneer in an urban environment.





## Register for the Sims 2017 Conference

Please call or email Anita Clavin at **203.418.9005** or [aclavin@hjsims.com](mailto:aclavin@hjsims.com) with any questions or requests for additional information. To register for the HJ Sims 2017 Conference visit: [hjsims.com/register](http://hjsims.com/register), or mail or fax your registration form to Anita Clavin (Fax: 203.256.2377). Please mail the check for your registration fee (we're unable to accept credit cards) to: Anita Clavin, HJ Sims, 2150 Post Road, Fairfield, CT 06824-5669.

### Registration Fee:

Senior Living Community Owner or Management: **\$295** for first registrant, **\$195** for each additional registrant  
Others: **\$795**. There will be an additional **\$75 fee** for participation in the Golf Tournament or Bass Fishing and an additional **\$50** for Trap Shooting or the Food Truck Tour. Duck Tour and Biking Tour are complimentary.

### Hotel Reservations:

We have reserved a limited block of rooms at the special Conference rate of **\$239 per night** at the Hyatt Regency Austin, 208 Barton Springs, Austin, TX 78704. That rate will be available until **February 3, 2017**. You may make your reservations directly with the hotel after you have registered for the Conference. To make your hotel reservation online, please [click here](#) or call the group reservations number at **888.421.1442** and mention the 2017 Sims Late Winter Conference room block.

## REGISTRATION FORM

First \_\_\_\_\_ Last \_\_\_\_\_

Badge Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email \_\_\_\_\_

**Activities:** Please check the activity in which you'd like to participate:

**Tuesday, February 28** – Transportation leaves Hyatt Regency Austin at the times shown below:

Golf Tournament on Omni Barton Creek Resort

Crenshaw Cliffside Golf Course – 7:00 a.m.

Yes  No – **\$75**

Bass Fishing on Lake Bastrop – 7:00 a.m.

Yes  No – **\$75**

Trap Shooting at Hyatt Lost Pines – 9:30 a.m.

Yes  No – **\$50**

Austin Duck Tour – 10:00 a.m.

Yes  No – **Complimentary**

Biking Tour around Lady Bird Lake – 10:00 a.m.

Yes  No – **Complimentary**

Food Truck Tour of Austin – 11:00 a.m.

Yes  No – **\$50**

### Thursday, March 2

Westminster Life Plan Community Tour – 1:00 p.m.  Yes  No – **Complimentary**

Conference attire: Business Casual

