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2019 Annual Convention  
November 6-9  
Hilton Nashville Downtown  
Nashville, TN

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INSTRUCTOR BIOS

(f)



## Melissa Alexander

**Nashville**  
**Vice President**

View Properties > (<https://www.linkedin.com/in/mbalexander/>)  
(mailto:[melissa.alexander@foundrycommercial.com](mailto:melissa.alexander@foundrycommercial.com)) ([resources/vCard/generateVCard.php?fName=Melissa&Name=Alexander&title=Vice+President&email=melissa.alexander@foundrycom\(615\)771-9465&mobile=&fax=&address=&city=&state=&zip=&url=](/resources/vCard/generateVCard.php?fName=Melissa&Name=Alexander&title=Vice+President&email=melissa.alexander@foundrycom(615)771-9465&mobile=&fax=&address=&city=&state=&zip=&url=)) (tel:(615) 771-9465)

## Experience

Melissa Alexander serves as Vice President for Foundry Commercial and works on the Industrial Services team in Nashville, TN. Melissa has more than twelve years of real estate experience focusing on the leasing, sale and development of industrial properties in Middle and West Tennessee.

Melissa previously served as Principal of the Cushman & Wakefield (C&W) affiliate in Memphis, TN. She served as the only female partner and only female broker in the firm. In this role, she assisted local and multi-market clients with strategic planning and tactical execution of their real estate requirements. Duties included surveys, RFP's, tours, procurement/oversight of multi-market brokers inside and outside of the C&W network, LOI negotiation, lease negotiation, BOV's, financial analysis, mapping, business development, client communication and travel. Select clients included: Amazon, Peterbilt, Reading Equipment, V. Alexander, Mueller, Graham Packaging, Evergreen & CSI.

An expert in team branding and social media, Melissa has strong business and commercial real estate presence on Twitter and LinkedIn. She has been featured in Bisnow and is named one of the top Commercial Real Estate Influencers to follow on Twitter and LinkedIn by Duke Long. In 2016 she was named Top 40 Under 40 by the Memphis Business Journal.

## Transaction Experience

- Completed more than 3 MSF transactions with a value of more than \$60 million
- Multi-market transaction experience in more than 20 states and ten countries

## Education

- B.B.A. Belmont University
- M.B.A. Union University

## Community Involvement

- Advertising committee for Blue Streak Scholarship Fund's largest fundraiser, Taste of Jubilee
- January 2018, Athens, Greece - Damaris House, assisting refugees/victims of human trafficking
- Two-term, past board member of American Advertising Federation of Memphis
- St Mary's Episcopal School Grandparents Day Committee Chair - 2015
- St Mary's Episcopal School Grade Captain - 2016
- Christian Psychological Center Past Board Member

## Properties



([properties/land/nails-creek-road-land.shtml](/properties/land/nails-creek-road-land.shtml))

## Nails Creek Road Land



Shawn Bailes is a real estate entrepreneur with multiple LLC arrangements, most notably as principal of FMBC Investments and Capital City Construction.

At FMBC Investments, Shawn has managed historic rehabs, urban infill developments, mixed-use developments, re-zoning efforts, multi-family builds, peer-to-peer investor lending, and income-producing properties. Shawn currently owns over 200 properties in his portfolio and continues to expand. He has also won

four Historical Commission of Metropolitan Nashville Awards for both historic renovations and in-fill development throughout the Nashville area. He is also the CEO and founder of Capitol City Construction, a full-service construction firm that specializes in building for investors.

Shawn's formal education is in Mechanical Engineering, holding a Bachelor of Science from the University of Kentucky. Along with a love of UK basketball, he also enjoys the art and the process of real estate. With his background in engineering, he often finds innovative ways to bridge theory and real life. A current project called 83 Freight is located right next door to the new MLS Soccer Stadium in the Fairgrounds-Wedgewood/Houston community. This property consists of 173 modified shipping containers assembled to make 83 units, approximately 55,000 square foot, of apartment space.

You can see more about Shawn's past projects at his websites: [www.FMBCInvestments.com](http://www.FMBCInvestments.com), [www.CapitalCityConstructionLLC.com](http://www.CapitalCityConstructionLLC.com).

**Roger Baum**  
**Vice President of Public-Private Partnerships**  
**CORE Construction**

Roger is a fourth generation builder who currently serves as Vice President of Public-Private Partnerships for CORE Construction, a leading construction management firm in the U.S. In his current role, Roger is responsible for overseeing all of CORE's public-private developments across the country, working closely with project consortium partners and public sector counterparties to help successfully facilitate all aspects of a development from structured finance through long-term facility management.

In 2012, Roger helped structure and oversee the successful implementation of Arizona's first ever privately financed and maintained public schools under a progressive DBFM (design, build, finance, maintain) structure, and has since helped architect dozens of innovative social infrastructure projects across the country. He is considered by many to be a leading subject matter expert on integrated project delivery methodologies, and he is an active participant in the Performance Based Building Coalition and the U.S. Green Building Council.

Roger is a graduate of Concordia University Wisconsin where he obtained a degree in business administration and finance."

### **Theddi Wright Chappell, CRE**

Theddi Wright Chappell, CRE, MAI, FRICS, AAPI, LEED AP currently serves as Director of the Utah C-PACE program, working with Sustainable Real Estate Solutions, the nation's leading provider of commercial property assessed clean energy (C-PACE) program administration support services. Prior to joining SRS, Chappell was CEO of Sustainable Values, Inc., her own woman-owned business and a real estate consulting practice focused on valuation consulting, impact investing, and optimizing real estate returns for investors, owners, and other stakeholders. Before that she served as a national practice leader in the Green Advisory Practice of Cushman & Wakefield and as a senior managing director in the company's Valuation & Advisory group.

Ms. Chappell has extensive experience in the valuation of commercial properties, with a specialization in analyzing both the costs and benefits of high performing, energy efficient properties. She is a national and international speaker and educator on the implications of green strategies on asset value.

**BIO**

## Leo Civelli

CEO Europe, Duff & Phelps Real Estate Advisory Group

Leo Civelli is the Chief Executive Officer of the Duff & Phelps [Real Estate Advisory Group](#) (REAG) European Operations.

He has over 30 years' experience in overall management of real estate operations, including the business development of real-estate-related advisory services globally.

Leo Civelli is a member of various national and international appraisal organizations and is a Fellow of the Royal Institute of Chartered Surveyors (FRICS). He is a frequent speaker at national and international conferences and he has been a lecturer at the University of Milan and Turin.

Prior to joining REAG, Leo Civelli worked with internationally known civil contractor firms providing quantity surveying and project management, gaining significant experience in several African countries.

## DEBORAH CLOUTIER



Deborah Cloutier brings more than 25 years of leadership experience consulting with clients in commercial real estate, energy management, and environmental sustainability. She has extensive experience designing, developing, implementing, and managing award-winning and innovative environmental, social, and governance (ESG) programs for the built environment for clients including the Berkshire Group, the Blackstone Group, Principal Real Estate Investors, Tishman Speyer, and UDR. On behalf of industry leaders, Ms. Cloutier manages large, complex projects that help clients integrate strategic environmental management into standard business practices and to achieve data-driven performance results. Under her leadership, clients have achieved hundreds of millions of dollars in avoided utility costs, and consistently receive industry recognition for their leadership in sustainability. She is a nationally recognized speaker, serves on numerous industry boards, and has authored publications highlighting the financial impacts of strategic energy management and sustainable business practices to enhance asset value. In 2017, Ms. Cloutier earned the Counselor of Real Estate (CRE) designation in recognition of her expertise, experience, and ethics in providing advice and support to the commercial real estate community.





## HARRISON COERVER & ASSOCIATES ASSOCIATION MANAGEMENT CONSULTANTS

Harrison Coerver, President of Harrison Coerver & Associates, is an internationally recognized association consultant and bestselling author. His practice specializes in strategy and planning for trade associations, professional societies and other tax-exempt membership organizations. In the last 28 years, Harrison has consulted over 1,300 associations in strategy, planning, governance and management. He has directed the design and execution of several association research projects. He is known for his straightforward style and innovative approaches to association strategy, management and governance.

He is the co-author of ASAE's all-time bestselling book *Race for Relevance: 5 Radical Changes for Associations* and its sequel *Road to Relevance: 5 Strategies for Competitive Associations*

Representative clients include:

American Institute of CPAs  
National Association of Wholesalers-Distributors  
Country Music Association  
National Association of Manufacturers  
American Quarter Horse Association  
Associated General Contractors of America  
Independent Insurance Agents and Brokers of America  
National Automobile Dealers Association  
American Optometric Association  
National Beer Wholesalers Association  
American Nurses Association  
International Franchise Association

You may contact Harrison at 239.281.1691 or [harrison@harrisoncoerver.com](mailto:harrison@harrisoncoerver.com) or visit his website at [www.harrisoncoerver.com](http://www.harrisoncoerver.com).



Jim Costello, CRE, Senior Vice President, Real Capital Analytics

o: (949) 640-8780 • [jcostello@rcanalytics.com](mailto:jcostello@rcanalytics.com)

Jim Costello has worked in the CRE space on issues of urban economics since 1990, including a 20 year stint at CBRE with the Torto Wheaton Research team. Jim expanded the reach of the Torto Wheaton Research developing forecasts of global market fundamentals. Jim also developed approaches to pair the forecast results with frameworks to answer investor questions on asset values and relative investment opportunities.

Jim provided advice to the Treasury Department and other policy makers in the aftermath of the Global Financial Crisis and helped educate these professionals on commercial real estate performance. Jim has recently been made a member of the Commercial Board of Governors of the Mortgage Bankers Administration and is working there as well to help policy makers understand our industry.

Jim is expanding the capabilities of the Real Capital Analytics team on issues of real estate market dynamics. Jim has a Master's degree in economics and is a member of The Counselors of Real Estate.

September 2016

# MICHEL COUILLARD

**PRESIDENT AND CHIEF EXECUTIVE OFFICER  
BUSAC REAL ESTATE**

Since his arrival as President of BUSAC Real Estate, Michel Couillard has led the company to the highest spheres of the real estate industry through the active management of the firm's assets and strategic investments. Be it via the acquisition, repositioning and restructuring of assets, property development, construction projects or real estate financing, he has demonstrated solid leadership and continued the fostering of strategic relationships with leading partners. Michel Couillard is responsible for overall investments, development strategies, as well as the management and growth of BUSAC real estate portfolio. As such, he oversees all business activities in Canada, in addition to the management of assets, plus numerous acquisition and development projects in the United States. He has proudly built successful partnerships with many notable Canadian and U.S. financial institutions and continues to seek out new investment opportunities across North America.

Michel Couillard has served as President and Chief Executive Officer of BUSAC Real Estate since September 2001. He originally joined the company as Executive Vice-President in 1999. Throughout his career, he has held senior management positions with various real estate companies in Canada, such as Canada Lands Company and Magil Laurentian, in addition to earning degrees and designations in the field of real estate from a number of universities in Canada and the United States. In 1997, Michel Couillard was invited into membership of the highly prestigious professional organization The Counselors of Real Estate (CRE). In 2007, Mr. Couillard became Fellow of the Royal Institution of Chartered Surveyors (RICS) and will serve as Chair of The Counselors of Real Estate (CRE) organization in 2020.

**BUSAC REAL ESTATE  
A COMPREHENSIVE GROUP OF REAL ESTATE HOLDINGS  
PART OF JEMB REALTY CORPORATION**

**BIOGRAPHY**



**Bill Cromwell**  
**Director of Real Estate Asset Management**  
**University of Virginia Foundation**  
**bcromwell@uvafoundation.com**  
**(434) 982-4646**

Bill Cromwell is the Director of Real Estate Asset Management for the University of Virginia Foundation. Bill joined the Foundation in September of 2000 to oversee the management and operation of the Foundation's real estate assets, including farms, offices, hotels and residential properties. In addition to the operating properties, Bill oversees the acquisition and disposition of real estate for the Foundation including real estate gifts to the University of Virginia.

Bill has an extensive background in the financing, development and asset management of large, mixed-use commercial real estate portfolios for Fortune 500 companies, including National Life of Vermont, Travelers Insurance Company and CSX Real Property, Inc.

Bill is a native Texan and a graduate of Baylor University.

###



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**ANTHONY F. DELLAPELLE**  
[adellapelle@mckirdyriskin.com](mailto:adellapelle@mckirdyriskin.com)

**Anthony F. DellaPelle** is a shareholder in the law firm of McKirdy, Riskin, Olson & DellaPelle, P.C., in Morristown, New Jersey. He is a Certified Civil Trial Attorney by the New Jersey Supreme Court. He has represented property owners in eminent domain, redevelopment and real estate tax appeal matters for more than 30 years. Tony is the sole New Jersey attorney elected to Owners Counsel of America, [www.ownerscounsel.com](http://www.ownerscounsel.com), a national association of leading eminent domain lawyers, and formerly served on its Board of Directors. He is also a member of the Board of Directors of the *Counselors of Real Estate*®, [www.cre.org](http://www.cre.org), an international organization of real estate professionals limited to approximately 1,100 worldwide members. He is widely recognized as a leading practitioner in real estate valuation litigation, speaks on a variety of property rights topics in New Jersey and nationally, and holds Martindale Hubbell Law Directory's highest rating – AV. He has long been recognized by his peers as a “New Jersey Super Lawyer” in the *New Jersey Monthly Magazine*, being selected by that publication as one of New Jersey's Top 10 attorneys for 2012, and as one of New Jersey's Top 100 attorneys every year since 2009. He received a B.A. degree in Economics and English from Franklin & Marshall College, and his J.D. degree from the Seton Hall University School of Law. Active in civic affairs, he is a Trustee of the Great Swamp Watershed Association, has served as a Trustee of Franklin & Marshall College, and is a Past President of the Franklin & Marshall College Alumni Association.

## Mark Deutschmann Bio

Mark Deutschmann is a community builder who has worked with neighbors, city leaders and nonprofits for 30-plus years while helping shape development in Nashville and revitalizing the city's most sought-after neighborhoods.

Deutschmann founded VILLAGE in 1996, which grew to more than 350 agents and staff under his ownership. In 2003, he founded Core Development Services, a company actively developing Nashville's urban center with adaptive reuse and mixed-use infill development. In 2005, The CityLiving Group was formed – Deutschmann's personal real estate team focusing on multi-residential sales. At the end of 2018, VILLAGE celebrated their 22<sup>nd</sup> anniversary and The VILLAGE Fund, the nonprofit and charitable arm of VILLAGE, having provided over \$2.2 million in grants to organizations helping to enrich and strengthen Nashville. Deutschmann sold VILLAGE in the beginning of 2019 and now serves as chair emeritus.

Ever engaged in the community, Deutschmann is the former chair of the Urban Land Institute Nashville and the past president of Greenways for Nashville. He now serves on the Greenways Commission.

In his book *One-Mile Radius – Building Community from the Core*, Deutschmann shares what he has learned about activating Nashville's neighborhoods, connecting them and helping them become sustainable, and using business as a tool for positive social change.

He holds undergraduate degrees in zoology and Spanish and a MBA in international management. Mark is married to Sherry Stewart Deutschmann who supports his entrepreneurial spirit. Mark enjoys juggling, kayaking, and loves walking in urban neighborhoods and on Nashville's Greenway system.

**Clare Duan**  
**VP and Director of Acquisitions**  
**Senior Resource Group (SRG)**

Ms. Clare Duan is a VP and Director of Acquisitions at Senior Resource Group, a fully integrated senior living owner-operator platform with \$3.5 billion assets under management with a primary focus of Class A senior living communities in prime, urban infill locations across North America. SRG has a 30+ years of track record in U.S. senior living and specializes in senior living operations, development and investment management for sovereign wealth funds and large institutional investors.

Prior to joining SRG, Clare was a Vice President of Special Situations Group at Colony Capital, a global real estate investment manager with \$40 billion assets under management. She has experience in multi-billion dollars of real asset and M&A transactions across the U.S. and Europe ranging from senior housing, healthcare facilities, data centers, hotels, education facilities, residential properties and other long-term net leased assets.

Prior to joining Colony Capital, Clare worked at Morgan Stanley Real Estate and UBS Healthcare Investment Banking in New York. Clare got her MBA from Massachusetts Institute of Technology (MIT) and B.S. from Boston College.

## Elam Freeman

Affiliate Broker

Elam is a Licensed TN Affiliate Real Estate Broker who advises restaurant, retail, entertainment, fitness and creative office clients in their search for commercial space. She also works with landlords on sales and marketing strategies to procure new tenants. Elam focuses on urban districts, emerging neighborhoods, and adaptive reuse developments.

Prior to joining Baker Storey McDonald Properties, Elam served as associate director of commercial properties, managing commercial assets that housed more than 100 commercial tenants, as well as providing oversight of the large-scale renovation project at the historic RCA Studio A.



### ● HIGHLIGHTS

#### Education

Pepperdine University - Summa Cum Laude with a B.A.in Political Science  
Certificate in Conflict Management from the Straus Institute at Pepperdine University School of Law

#### Professional/Community Involvement

- Licensed Real Estate Agent in Tennessee
- International Council of Shopping Centers (ICSC), Member
- An X-TEAM (<http://www.xteam.net>) member
- Retail Christian Network- RCN Steering Committee
- Walk Bike Nashville- Governing Board Member
- Nashville Pepperdine Alumni Chapter- Committee Chair
- Harding Academy Alumni Board- Board Member
- Small World Yoga- Certified Volunteer Yoga Instructor
- Member of Young Leaders Council Class 70

### i CONTACT INFORMATION

#### Elam Freeman

Baker Storey McDonald Properties, Inc.  
3011 Armory Drive, Suite 120  
Nashville, TN 37204





## Jan D. Freitag

Mr. Jan D. Freitag is a Senior Vice President for **STR (STR, Inc.)**. STR provides clients from multiple market sectors with premium, global data benchmarking, analytics and marketplace insights. Founded in 1985, STR maintains a presence in 10 countries around the world with a corporate North American headquarters in Hendersonville, Tennessee, and an international headquarters in London, England.

In his role, Mr. Freitag oversees a variety of projects, all charged with the accumulation and interpretation of global lodging data. He is a sought-after public speaker and is frequently quoted in trade publications and the general news media such as The Wall Street Journal, New York Times, Associated Press, Reuters, Forbes, etc.

Prior to joining STR, Mr. Freitag was the Director of Content Integrity at hotelreports.com in upstate New York and a hospitality consultant with Ernst & Young in Phoenix. He holds a bachelor's degree, with distinction, from the School of Hotel Administration, Cornell University, and received his Executive MBA, with honors, from Vanderbilt University. Mr. Freitag resides in Nashville, TN.



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### Highlights



2 mutual connections

You and Orion both know Theddi Wright Chappell and Tim Lowe

### About

Orion Fulton has over 18 years professional experience developing sustainable real estate and infrastructure.

Within Arup's Transaction Advice practice in the Americas, Orion leads the Social Infrastructure and Real E ... see more

### Activity

1,001 followers

Thanks Pete. I do too #gretathunberg

Orion commented

Awesome.

Orion commented

I am so proud of this! #advisory #sustainabledevelopment

Orion shared this  
42 Likes · 7 Comments

[See all](#)

### Experience

Associate Principal

Arup

Oct 2009 – Present · 10 yrs

San Francisco Bay Area

Orion Fulton is an Associate Principal in Arup's San Francisco office and leads the Social Infrastructure and Real Estate business for Arup's Transaction Advice practice. Mr. Fulton is a trusted advisor in the project development process, with over 16 years of experience assisting public and private sector clients with project feasibility analysis, procurement strategy, deal structuring, negotiations, and funding plans. He specializes in pre-construction real estate engagements for eco-districts, social infrastructure P3s, airport cities, and real estate portfolio retrofits. Orion holds a BA in Urban Planning from UC San Diego and a MBA from Presidio School of Management.

... See more

### People Also Viewed



Roberto Sierra · 3rd

Infrastructure and Project Financial Advisory



Jordan O'Brien · 2nd

District Infrastructure Lead at Go



Brien Sipe · 3rd

Senior Consultant at CLEARResult



Daniel Harris, P.E. · 3rd

Project Manager at RWDI



Cory Wiltshire · 3rd

Project Manager at Engineered



Messaging

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Connections to Orion



Theddi Wright Chappell  
CEO at Sustainable Values, Inc.



Tim Lowe  
Waronof Associates, Inc.

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Paul Culpepper  
Paul: Glad to hear that Larisa. I a...



Robert D. (Bob) Grace  
You: of course I remember you, B...



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### Independent Consultant

Self-Employed  
Apr 2009 – Feb 2010 · 11 mos  
buying and selling real estate on my own

### Senior Sustainability Manager

Sama Dubai  
Jul 2008 – Dec 2008 · 6 mos  
Directed the sustainability strategy for The Lagoons, a 98 million GFA mixed-use development in the Dubai, UAE. In this capacity he guided infrastructure, development, and third party teams to optimize capital budgets through sustainability policy and asset management analysis.

### Project Manager (intermittent)

StopWaste.Org  
Sep 2007 – Jun 2008 · 10 mos  
coordinating the development of multifamily green building guidelines (during business school).

### Summer Business Intern

Rana Creek Habitat Restoration  
Jun 2007 – Aug 2007 · 3 mos  
Developed prospectus for intellectual property and business operations analysis (during business school).

Show 3 more experiences

## Education

### Presidio School of Management

MBA, real estate, business management  
2006 – 2008  
Activities and Societies: Founder, Green Building Club  
Now called the Presidio Graduate School

### University of California San Diego

BA, Urban Planning, Environmental Studies  
1993 – 1998  
Graduated with honors. Senoir thesis on the role of habitat conservation in regional land use planning and urban growth modeling.

## Licenses & Certifications

LEED AP  
US Green Building Council

## Messaging

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Connections to Orion

**Theddi Wright Chappell**  
CEO at Sustainable Values, Inc

**Tim Lowe**  
Waronzof Associates, Inc

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You:

**Marcio A.**  
Sponsored • Software that...

**Paul Culpepper**  
Paul: Glad to hear that Larisa. I a...

**Robert D. (Bob) Grace**  
You: of course I remember you, B...

**Cassie from LinkedIn Premium**  
LinkedIn Offer • Reactivate your...

**Marcio A.**  
Sponsored • Software that walks...



## Gregory P. Gheen, CRE, CCIM, CPM

President

Email: [ggheen@RealtyTrustGroup.com](mailto:ggheen@RealtyTrustGroup.com)



### Education

#### Master of Business

**Administration**— Concentration in Finance from the University of Tennessee, Knoxville

**Bachelor of Arts**— Economics from Maryville College

### Brokerage

**Licensed Broker in the States of:** Alabama, Georgia, North Carolina, Virginia and Tennessee

### Memberships/ Civic Involvement

**Counselors of Real Estate**— CRE Designation, Member ID #11180

**Commercial Investment Real Estate Institute**— CCIM Designation, Certificate #7154

**Institute of Real Estate Management**— Certified Property Manager, CPM Key #16285

**United Way of Greater Knoxville**— Tocqueville Cabinet

**Knox County Industrial Development Board**— Past Chairman

**Knox County Health & Education Board**— Past Chairman

**Leadership Knoxville**— Class of 2000

**Finance Committee**— Cokesbury United Methodist Church

Greg is one of the founding members of Realty Trust Group ("RTG") and has served as President since its formation in 1998. He has over 29 years of healthcare real estate experience including: strategic facility planning and network development for large health systems; syndication of real estate partnerships involving physicians; litigation support for CON filings and Fair Market Value opinions; monetization of healthcare portfolios; and development of healthcare facilities including medical offices, surgery centers, fitness centers and cancer treatment facilities. In addition to his efforts leading the firm, he is the principal broker for RTG and is licensed as a real estate professional in five states.

### Selected Presentations:

- "Does Your Real Estate Compliance Program Need First Aid?", Florida Hospital Association, July 2018
- "Developing an Effective Real Estate Compliance and Audit Strategy", Florida Hospital Association, April 2018
- "Implementing a Healthcare Real Estate Compliance Program", Hall Render, April 2017
- "Challenges & Opportunities with Medical Real Estate", Tennessee Orthopaedic Society, September 2014
- "Structuring, Medical Office Building Transactions: From Concept to Completion", co-presenter at AHLA Healthcare Transactions program, April 2014
- "Regulatory Issues in Healthcare Real Estate Transactions - A review of STARK and Anti-Kickback Statute", American Health Lawyers Association - Webinar Boot Camp Series, February 2013
- "Real Estate Trends in the Healthcare Industry", moderator of session for Counselors of Real Estate mid-year meeting, Chicago, IL, April 2012
- "Real Estate Monetization: Challenges and Opportunities", TSCPA Healthcare Conference, Nashville, TN, November 2010
- "Strategic Real Estate Management", HFMA Southern Institute, Nashville, TN, 2004
- "Strategic Facility Management", HFMA Fall Institute, Gatlinburg, TN, October 2002
- "Access Capital Through Effective Real Estate Management", InfoLine Healthcare Real Estate Conference, Chicago, IL, July 1997
- "Managing Real Estate Costs: A Competitive Edge for Healthcare Providers", closed circuit teleconference sponsored by PriceWaterhouse LLP, July 1996
- "Real Estate in the Healthcare Organization", annual NACORE meeting and co-sponsored by HFMA, Chicago, IL, April 1996

### Selected Articles:

- "Common Compliance Pitfalls Involving Real Estate Lease Arrangements with Referral Sources", AHLA PG Briefing, April 2018
- "Developing a Healthy Real Estate Compliance Program", Compliance Today, July 2017
- "Unlocking Value with Healthcare Real Estate Analytics", HIT Leaders & News, January 2017
- "It's Time to Focus on Real Estate Optimization", Healthcare Financial Management Association (HFMA Blog), October 2016
- "Medical Office Fever: Healthcare Development Competition Heats Up", Commercial Investment Real Estate Magazine of CCIM Institute, May/June 2014
- "Current Trends in Physician Real Estate Ownership", The Advisory Board Company - Physician Practice Roundtable, July 2013
- "Real Estate Issues Common to Physician Practice Acquisitions", PYA Healthcare ALERT, April 2012
- "Understanding MOB Ownership", PYA Healthcare Advisory, November 2010

**Jeremy Goldkorn**  
**Editor-in-Chief, SupChina.com**  
**Co-Host, Sinica Podcast**

Jeremy Goldkorn is editor-in-chief of SupChina.com and co-host of the Sinica Podcast. He moved to China in 1995 and became managing editor of Beijing's first independent English-language entertainment magazine. In 2003, he founded the website and research firm, Danwei, which tracked Chinese media, markets, politics and business. It was acquired in 2013 by the Financial Times.

While in China, Goldkorn published and edited several magazines, books, and websites. He also lived in a workers dormitory, produced a documentary film about African soccer players in Beijing, and rode a bicycle from Peshawar to Kathmandu via Kashgar and Lhasa. He moved to Nashville Tennessee in 2015 and is a board member of the Tennessee China Network.

# Curriculum Vitae

**Robert S. Griswold, CRE<sup>®</sup>, CPM<sup>®</sup>, CCIM<sup>®</sup>, CCAM<sup>®</sup>, PCAM<sup>®</sup>, GRI<sup>®</sup>, ARM<sup>®</sup>**

**Griswold Real Estate Management**  
5703 Oberlin Drive, Suite 300  
San Diego, CA 92121-1743

**(858) 597-6100**  
**(858) 597-6161 (fax)**  
**rgriswold@griswoldremgmt.com**

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## WORK EXPERIENCE

### **Griswold Real Estate Management, Inc.**

#### **Position: President**

*1987 to present*

- Directing and operating Griswold Real Estate Management, Inc. a San Diego and Las Vegas-based Accredited Management Organization (AMO<sup>®</sup>) with a management portfolio of over 2,000 residential units, plus 500,000 sq. ft. of commercial, industrial, self-storage and retail properties in Southern California and Southern Nevada. Have actively managed over 60,000 residential units and several million square feet of commercial, industrial, self-storage and retail properties nationally in the last 30+ years.
- Extensive experience as a court-appointed receiver (nearly 200 times) for private lenders and major financial institutions such as California Bank & Trust, One West Bank, La Jolla Bank, Banco Popular, Travelers Realty Investments, G.E. Capital, Wells Fargo Bank, Union Bank, First Nationwide Bank, Bank of America, California Federal Bank, American Real Estate Group/American Savings, Federal National Mortgage Association (Fannie Mae), Great Western Bank, ITT Federal Bank, Pacific National Bank, Provident Bank, Redlands Federal, Cornerstone Bank, Sanwa Bank, World Savings and Loan, Glendale Federal Bank, First Federal Bank, International Savings Bank, Century Federal Bank, GMAC Commercial Finance, J.E. Robert Companies, Quaker City Federal Savings & Loan, and Bankers Mutual.
- Served as an expert witness consultant on over 1,800 occasions for both Federal and Superior Court cases in California, Nevada, Arizona, Hawaii, New Mexico, Washington, Oregon, Idaho, Wyoming, Colorado, Florida, Kansas, Georgia, New Jersey, Delaware, Kentucky, Maryland, Massachusetts, Michigan, Missouri, Pennsylvania, Tennessee, Texas, Virginia, West Virginia and other states.
- Court-appointed bankruptcy Custodian and Referee.

### **VMS Realty Partners**

Position: Division Vice President and Corporate Broker

*1984 - 1987*

- Managed nearly 8,000 residential units, plus commercial properties with over 275 employees throughout the Western United States. Responsible for implementation of marketing plans for new and repositioned properties, development and monitoring of annual budgets for corporate office and all properties, development of regional policies and procedures, and personnel selection and appraisals.



## **Five Star Management Group**

Position: Regional Vice President

1983 - 1984

- Managed over 2,400 units and 75 employees. Responsible for all policies and procedures, marketing, personnel, contracting and budgeting. Actively involved in assimilating newly acquired properties, writing company procedures and improving employee-training program.

## **EDUCATIONAL BACKGROUND**

- 1988, Master of Science, Business Administration, Real Estate Development, University of Southern California, Los Angeles, California.
- 1986, Master Business Administration, International Finance and Real Estate & Urban Land Economics, University of Southern California, Los Angeles.
- 1981, Bachelor of Science, Finance and Business Economics/Real Estate Finance, University of Southern California, Los Angeles, California.

## **PROFESSIONAL DESIGNATIONS/LICENSES**

- Counselor of Real Estate (CRE®) designation. The CRE designation is extended by invitation only and is awarded based upon reputation, integrity, and in recognition of superior problem solving ability in various areas of specialization such as litigation support, asset management, valuation, feasibility studies, acquisitions/dispositions and general analysis.

Only 1,100 practitioners throughout the world carry the CRE Designation, denoting the highest recognition in the real estate industry. CRE members average 55+ years of life experience, including at least 20 years of high-level experience in the real estate industry. CRE members achieve results, acting in key roles for over 300 Fortune 500 firms in annual transactions and/or real estate decisions valued at over \$41.5 billion

- Owner of an Accredited Management Organization (AMO®) firm. A designation from the Institute of Real Estate Management (IREM)--Only three percent of all management firms nationwide have earned this designation by fulfilling stringent requirements in experience, education, integrity and financial stability.
- Certified Property Manager (CPM®) designation from IREM.
- Accredited Residential Manager (ARM®) designation from IREM.
- Certified Commercial Investment Member (CCIM®).
- Certified Community Association Manager (CCAM®).
- Professional Community Association Manager (PCAM®).
- Graduate, Realtor Institute (GRI®).
- California Real Estate Broker (since 1984).
- Nevada Real Estate Broker and Property Management Certificate holder (since 2002).



## MEMBERSHIP/TEACHING/AWARDS IN PROFESSIONAL ASSOCIATIONS AND OFFICES HELD

- 1<sup>st</sup> Place (and only award presented despite record number of entries) for best Television Broadcast journalism for NBC News in the National Association of Real Estate Editors (NAREE) 49<sup>th</sup> Annual National Real Estate Journalism competition. The judges' comments were: "It's immediately obvious that Mr. Griswold has a far-reaching grasp of the real estate industry, and is adept at dispensing it in easy-to-comprehend language."
- 1<sup>st</sup> Place for best Radio Broadcast journalism for Clear Channel Communications in the National Association of Real Estate Editors (NAREE) 48<sup>th</sup> Annual National Real Estate Journalism competition for his work as the host of a weekly live radio show "***Real Estate Today! with Robert Griswold***". The popular non-advertorial call-in show covers all topics in real estate and was on the air for over 14 years.
- CPM® Professional Achievement Award (only the 6th active recipient in California)
- Certified Property Manager of the Year – San Diego (1996)
- ARM® Certificate of Achievement (number 022)
- AMO® Firm of the Year (San Diego 1998)
- IREM Academy of Authors
- National Faculty of the Institute of Real Estate Management (IREM) (1988-present)

Currently teach a variety of IREM 2-day, 3-day and 6-day courses that are required to attain the Certified Property Manager and Accredited Resident Manager designations. These courses cover human resources/personnel, marketing and leasing, property maintenance, risk management, fair housing, accounting, investment analysis, valuation, and many other property management topics.

Have taught course 400 (Managing Real Estate as an Investment), a requirement for the CPM® designation and ARM 101 (Successful On-Site Management), a requirement for the ARM® designation. Member of the IREM Academy of Excellence for instructors.

- Current or former Member of the following IREM National Committees:
  - Governing Councilor (2011-present)
  - Accredited Management Organization
  - Accredited Management Organization File Review
  - Accredited Management Organization Task Force
  - Accredited Residential Manager Services and Standards
  - Chairman - Computer and Technology
  - Continuing and General Education
  - Fair Housing and Equal Opportunity
  - Journal of Property Management*
  - Journal of Property Management Advertising*
  - Management Plan
  - Management Plan Graders
  - Membership
  - Minority Outreach
  - Chairman - Public Relations
  - Publishing
  - Risk Management
- Editorial Review Board (1990-2005)
  - Journal of Property Management*

- Past Offices Held for IREM - San Diego Chapter Executive Council
  - President, IREM Chapter 18 (1995)**
  - President-elect (1994)
  - Past President (1996)
  - Vice President of Finance
  - Vice President of Education and Programs
  - Vice President of Administration and Communication
  - Director at Large
  - Accredited Residential Manager Chairman (1989-1994)
  - Accredited Residential Manager Coordinator (1989-1994)
- A California Department of Real Estate Certified Instructor
- Approved National Apartment Association Faculty
- Counselors of Real Estate –
  - National Board of Directors (2012-present)
  - National Executive Committee member (2016 -)
  - 2015 and 2016 Education Committee Co-Chair
  - National Liaison Vice Chair – 2014
  - Southern California Chapter Vice Chair (1999–2000)
  - San Diego Chapter – Founding Chairman (2000–present)
  - 2011 San Diego national meeting – Local Program Chair
  - Speaker, Moderator CRE National Meetings
- Lambda Alpha International – San Diego Chapter
- San Diego County Commercial Association of Realtors® (SDCCAR) (Founding Member, Board of Directors)
- San Diego Association of Realtors® (SDAR)
- California Association of Realtors® (CAR)
- National Association of Realtors® (NAR)
- San Diego County Apartment Association (SDCAA) (Former member of Board of Directors)
- California Apartment Association (CAA)
- National Apartment Association (NAA)
- Community Associations Institute (CAI)
- California Association of Community Managers (CACM)
- National Association of Home Builders (Media)
- Building Industry Association of San Diego County (Media)
- Urban Land Institute (Media)
- California Receiver's Forum
- San Diego Receiver's Forum
- Los Angeles/Orange County Receiver's Forum
- American Society of Real Estate Counselors (CRE®)

- Forensic Consultants Association (FCA) – San Diego
- Forensic Expert Witness Association (FEWA) – S. California
- Listed in numerous Who's Who publications, including National and California *Who's Who in Finance and Industry*, California *Who's Who*, *Strathmore's Who's Who*, *International Who's Who Professionals* and *Oxford's Who's Who*.

## OTHER WORK-RELATED ACTIVITIES

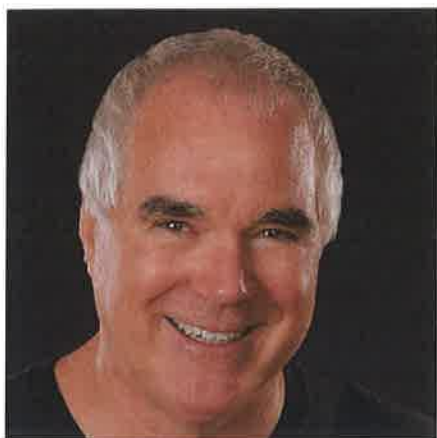
- Author of top selling national book "**Property Management Kit for Dummies**" (1<sup>st</sup> edition – 2008; 2<sup>nd</sup> edition - 2013) and "**Property Management for Dummies**" (2001).
- Co-Author of national bestselling book "**Real Estate Investing for Dummies**" (1<sup>st</sup> edition - 2004; 2<sup>nd</sup> edition - 2009).
- Co-Author of "**Landlord's Legal Kit for Dummies**" (2014)
- Real Estate Expert for NBC San Diego, (a General Electric/NBC owned affiliate) since 1995 appearing bi-weekly on "NBC News This Weekend"
- Real Estate Editor for News Radio 600 KOGO and formerly for AM 1130 KSDO (1994-2005).
- Host, "**Real Estate Today! with Robert Griswold**" (1991-2005) --a weekly live radio talk show on AM NewsRadio 600 KOGO.
- Columnist, "**Rental Forum**" a nationally syndicated feature of Inman News Features, appearing regularly in the Washington Post, Houston Chronicle, Orlando Sentinel, Tampa Tribune, San Antonio Express News, Grand Rapids Press, Dayton Daily News, Denver Post, Arizona Republic, St. Louis Dispatch, Daily Oklahoman, The Oregonian and many other major newspapers around the country.
- Lead Columnist, "**Rental Roundtable**"--a featured column on real estate management issues for the *Los Angeles Times*, the *San Diego Union-Tribune*, and *The San Francisco Chronicle*.
- Main Features Editorial Review Board, *Journal of Property Management* (1990-2005)
- San Diego Housing Commission Loan Committee (1999-2004)
- San Diego Receiver's Forum, Board Member (2008-2011); Vice President (2009-2010)
- Escape for All Seasons Homeowners Association, Big Bear Lake, CA  
President (1998–2001), Secretary (1997)
- Sabre Springs Neighborhood Homeowners Association, San Diego, CA  
Vice President (1998–2000), (2002–2005)
- Santaluz Maintenance Association, San Diego, CA  
President – (2007-2010), Vice President (2006-2007)
- City of San Diego Planning Commission, Planning Commissioner (2005–2013)
- Co-Author of *Mortgage Management for Dummies*, John Wiley & Sons, 7/2017

## **John Hunt**

### **MarketNsiht/ViaSearch**

John is the Principal of MarketNsiht and President of ViaSearch. An industry leader for almost 30 years, John has surveyed home buyers across the country, predicted the housing downturn as early as September 2005, provided the data that helped pass the Home Buyer Tax Credit in 2009, accurately predicted national housing starts in 2016, and has been on the leading edge of Millennial and Active Adult buying trends.

With expertise in markets across the Southeast and beyond, John is a highly sought-after speaker on the economy and real estate and is regularly quoted and published in national publications and news outlets.



## **Todd D. Jones**

MBA, MAI, AI-GRS, CRE, FRICS

**Principal, RealAdvice**

Todd.Jones@RealAdvice.com

813-760-0212

An internationally recognized expert, Mr. Jones has provided complex income-producing commercial property valuation, expert testimony, litigation support, ad valorem property tax counseling and representation, appraisal review, investment advice, marketability analysis, and feasibility analysis, including highest and best use analysis for virtually all types of commercial, industrial, residential, and special purpose real estate, on behalf of financial institutions, REIT's, government entities, publicly traded companies, and private concerns since 1985.

As a former President of the Florida Association of Property Tax Professionals, and an inaugural member of the Florida TaxWatch Tax Advisory Council, Mr. Jones regularly addresses the Florida Cabinet, Legislature, and various state agencies on property tax policy and issues impacting taxpayers. The Association successfully collaborated with other influential groups to change the law in Florida affecting how the assessors must develop and support valuations in defending challenged assessments, "leveling the playing field" by lowering the burden of proof for taxpayers in assessment challenges, and requiring the development of uniform rules, policies, and procedures for Value Adjustment Boards across Florida's 67 counties to improve fairness in taxation for all Floridians. In 2011, Mr. Jones served on the Florida Governor's Tangible Personal Property Taskforce. In 2012, the Florida legislature sought Mr. Jones' counsel on comprehensive property tax reform legislation.

For eight years, Mr. Jones taught the Appraisal Valuation course in the Nathan S. Collier Master of Science in Real Estate (MSRE) degree program at the University of Florida. The UF MSRE program has been consistently ranked in the Top Ten of all university real estate programs in the US and was named the top real estate degree program in the US in 2018. In addition, Mr. Jones taught the appraisal course for the Florida Bankers School for five years. The purpose of the Florida School of Banking (FSB) is to provide bank personnel at the supervisory and officer level the opportunity to increase their knowledge about the banking industry and the economy.



< [VIEW ALL TEAM \(HTTPS://ESARCH.COM/TEAM/\)](https://esarch.com/team/)

## Eric Klotz, AIA, NCARB

PRINCIPAL

Eric joined ESa’ design team in 1996, after earning his Bachelor of Architecture degree from the University of Cincinnati. His work has spanned a wide variety of building types— corporate office, education, hospitality and community facilities. As Principal, Eric specializes in complex office and hospitality projects at ESa, with a focus on both new construction and renovations. Most recently, he led the design process for the Gulch Crossing office in Nashville, which is the new corporate headquarters for ESa.

While his focus is architectural design, Eric has a strong passion for all types of design—from watches to graphics or industrial design and furniture. He believes that beautiful, thoughtful designs are an integral part of enriching our life experiences. Technology in the design process has always interested him, and Eric has always been an early adopter of new technologies. Over the years, he has helped to advance many of the firm’s internal processes through the introduction of new technologies, like BIM and 3D printing. Eric served on Autodesk Revit’s Client Advisory Board in its beginning stages, consulting with the developers at Revit to help shape today’s industry-leading BIM tool.

Eric believes that good architectural design “balances the needs of the user, the challenges of the site and environmental sustainability with the beauty of a clean, modern environment.” With nearly twenty years of design experience, Eric believes that excellent client service begins with open and constant



communication. "Anticipating clients' needs and responding to them above and beyond their expectations is the goal." When not in the office Eric is involved with his local town design review committee and enjoys mountain biking and watching his son play soccer.

## PROJECTS





## CURRICULUM VITAE RALF-PETER KOSCHNY

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22301 Hamburg  
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Fax: +49-40- 42 32 22-12

e-mail: [hamburg@bulwiengesa.de](mailto:hamburg@bulwiengesa.de)

homepage: [www.bulwiengesa.de](http://www.bulwiengesa.de)



■ **Family Name:** Koschny  
■ **First Name:** Ralf-Peter  
■ **Date of birth:** 1961  
■ **Nationality:** German

### EDUCATION

1984-1989

TUHH Technical University of Hamburg-Harburg  
Engineer (town-planning)

### MEMBERSHIP OF PROFESSIONAL BODIES

- CRE The Counselors of Real Estate
- FRICS *Fellow* of Royal Institution of Chartered Surveyors
- German Council of Shopping Centers
- International Council of Shopping Centers European Research Group
- Managing Director Plan 4 21
- Hamburg Chamber of Architects
- ULI Urban Land Institute
- SRL Association for Urban and Regional Land Use Planning

### CAREER

- Ralf-Peter Koschny started his career as town planner in Berlin. Afterwards he was engaged over 5 years in the economic promotion of Hamburg. He was entrusted with economic development in the region and supported local companies during phases of expansion. In particular he was in charge with the expansion of Deutsche Airbus.
- Since 1995 he has been managing the company gesa GmbH. The company specializes in analyses for the property market and is well established throughout Germany for retail analyses and concepts for retail and shopping center development.
- 2004 gesa GmbH merged with Bulwien AG to bulwiengesa AG and founded herewith one of the most important independent research and consultancy enterprises in Europe with regard to retail and real estate related issues.
- In his function as CEO of the bulwiengesa AG he is responsible for the real estate segments retail and leisure/recreation. Furthermore Ralf Koschny is managing director of bulwiengesa appraisal GmbH.



# Kimberly E. Lamb, CPM

Healthcare Regional Account Director - Jones Lang LaSalle Corporate Solutions Group

## CONTACT DETAILS

DIR +1 813 786 5317

Email [Kimberly.Lamb@am.jll.com](mailto:Kimberly.Lamb@am.jll.com)

## AFFILIATIONS AND MEMBERSHIPS

Institute of Real Estate Management (IREM)

2003 IREM Chapter #71 Past President & 2004-2005 Governing Council Member

ICSC Leadership Mentoring Program

Core Net -Nashville, Member & Mentoring Program

Urban Land Institute, Nashville, (ULI), Member and Mentor Program



## AREA OF EXPERTISE

Kimberly has been involved in Corporate/Commercial Real Estate for over 36 years with knowledge in overall corporate real estate operations & business modeling with a focus on Healthcare. She has expertise in large portfolio evaluation & planning, asset/property/broker management, site evaluation and negotiation, hospital client management and effective utilization of technology & BI. She is a thought leader with an eye on the future of CRE.

## PROFESSIONAL EXPERIENCE

As Regional Account Director with JLL, Kimberly is responsible for providing leadership support for Dignity Health and Texas Children's Hospital portfolio. She leads the development of the Healthcare Solutions Integrated Platform (IPS) and Ambulatory Portfolio Management (APM). Previously as Sr VP of Operations for LHCSG, Kimberly led the operational processes of various disciplines within the Healthcare Group on a portfolio aggregating 31 million plus square feet with more than 80 private and institutional clients ranging from Healthcare REITS to Hospital Systems. Kimberly's role included national platform planning and directing of all corporate healthcare real estate management activity while maintaining operational and strategic alignment with the third-party clients and LHCSG mission and goals. Prior to joining LHCSG, Kimberly held the position of Systems Regional Director of Real Estate for Ascension Health helping to build the CRE platform. In this role, she had regional oversight of all corporate real estate related activities in three major markets and Senior Living nationally. She provided strategic planning and directing of all corporate real estate transactional activity. Her portfolios included hospitals, ambulatory clinics, PCP and urgent care facilities, Medical office buildings and free-standing Emergency Departments. She focused on redevelopment, campus/portfolio planning and optimization. Site selection review, development and lease negotiations oversight, and execution were major components of her responsibility.

## INDUSTRY PARTICIPATION

Kimberly has served as past president of the Nashville IREM chapter and IREM National governing council board for two years. She has mentored real estate professionals for International Council of Shopping Centers, Urban Land Institute, Commercial Real Estate Women and Core Net Global. She participated in the Future Forward 2025 committee with Corenet Global addressing the future of CRE. This committee looks at the future of CRE and how AI, Big Data, and Technology will change the way we do business.

Kimberly has been recognized nationally by Real Estate Forum as one of the 2011 Women of Influence in Real Estate. She was also recognized as a Finalist in the Tampa Business Journal's 2011 Businesswoman of the Year award. She was most recently recognized by Real Estate Forum's national publication as a "2018 Women of Influence in Real Estate" Hall of Fame inductee for her accomplishments, advocacy for the next generation through mentoring and coaching, and respected and recognized as a top performer in the industry.

She was a speaker at the 2019 Globe Street Women of Influence Conference and a panelist at the 2019 BOMA Dallas MOB Seminar focusing on Emerging Trends in Healthcare.

## EDUCATIONAL & CREDENTIALS

- Bachelor of Science, Business Management, David Lipscomb University
- Tennessee, North Carolina and Florida Licensed Real Estate Broker
- Certified Property Manager (CPM)

# BIOGRAPHICAL NOTES



## MARIO LEFEBVRE

Vice President, Research – Global Real Estate Markets

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### ROLE

Mario Lefebvre leads Ivanhoé Cambridge's Research Team and supervises its work. The Team monitors the economic and real estate fundamentals of markets from around the world, focussing particularly on the markets in which Ivanhoé Cambridge is already well established and on potential new markets. The Team works closely with the Investment Group, the Portfolio Management Group and the Risks Management Team. Mario Lefebvre is also a member of the Caisse de dépôt et placement du Québec's Research Committee.

### PROFIL

Mr. Lefebvre is an economist who began his career in 1991 at the Bank of Canada, where he worked in both the Research Department and the International Department. In 1998, he joined The Conference Board of Canada where he stayed a total of 16 years. He first worked for the International Services Group of the Conference Board, which led him to be involved on projects with several Ministries of Finance, including those of Tunisia, Morocco and Ukraine. From 2002 to 2013, Mario Lefebvre was the Director of the Conference Board's Centre for Municipal Studies. In January 2014, Mario Lefebvre joined the Québec Urban Development Institute, where he served as President & CEO for two years, before joining Ivanhoé Cambridge in January 2016.

Mario Lefebvre holds a Bachelor's and a Master's degree in Economics from the University of Montreal. He was Chair of the Economic and Public Policy Committee at the Board of Trade of Metropolitan Montreal from 2011 to 2013 and Chair of the Public Policy Committee at the Quebec Economic Association from 2014 to 2016. He co-authored the book *Power Play: The Business Economics of Pro Sports*, published in March 2014.

## **Scott Levitan** **CEO & President** **Research Triangle Foundation**

Scott Levitan was hired in August 2017 to lead the Research Triangle Foundation as its CEO & President. He has over 30 years of experience working in mixed-use development, with an emphasis on university-related research parks.

Prior to his current role, Scott was the Vice President of Forest City Realty Trust and Development Director for the Science + Technology Park at Johns Hopkins and the New East Baltimore Community. There, he oversaw a \$1.5 billion initiative directly adjacent to The Johns Hopkins University medical campus that includes life science research and office space, residential, retail, a new public park and a community school. Prior to that, he was the Executive Director of Real Estate Development for Georgia Institute of Technology, where he oversaw all real estate planning and development activities for the Institute. During his tenure, he oversaw the development of Technology Square, a 1.6 million-square-foot institutionally sponsored but privatized development initiative in Midtown Atlanta.

Scott holds a master's degree in urban design from Harvard University, a master's in conservation studies from the University of York in York, England, and a bachelor's in architecture from Louisiana State University. He is active in a number of real estate industry organizations, including the Association of University Research Parks (AURP), for which he serves as Vice President.

**Terrence Llewellyn**  
**Principal**  
**Llewellyn Development, LLC**

Educated at Vanderbilt and having served in the US Marines thereafter, Terrence Llewellyn has now been working in multifamily development and consulting for over 29 years. During that time he has been involved in the development of over 5,000 units all over the southeast, and has survived three recessions.

He has been published in Multi Housing News, is a past Chairman of the Real Estate and Building Industry Coalition, a past President of the Greater Charlotte Homebuilders Association, and serves on the board of directors of the National Association of Home Builders, the Piedmont Public Policy Institute, the Shelter Provider's Political Action Committee and the Real Estate and Building Industry Coalition.

He was also awarded "Best Midrise of the Year" for Olmsted SoBro in partnership with CF:  
[https://www.multifamilyexecutive.com/design-development/mfe-awards/nashville-mid-rise-sings-with-authenticity\\_o](https://www.multifamilyexecutive.com/design-development/mfe-awards/nashville-mid-rise-sings-with-authenticity_o)

**Summary of Experience- Terrence Llewellyn**

Llewellyn Development, LLC, Principal, 1999 to Present

- Llewellyn Development, LLC develops multifamily projects ([www.LlewellynDevelopment.com](http://www.LlewellynDevelopment.com)).
  - ✓ Awarded "Best Midrise of the Year" for Olmsted Nashville with CF:  
[https://www.multifamilyexecutive.com/design-development/mfe-awards/nashville-mid-rise-sings-with-authenticity\\_o](https://www.multifamilyexecutive.com/design-development/mfe-awards/nashville-mid-rise-sings-with-authenticity_o)
  - ✓ Olmsted Nashville, 501 5<sup>th</sup> Ave S- a 328-unit, \$70 million, class A+ urban apartment community in Nashville, TN, located in the new, exciting SoBro area one block from Nashville's new billion dollar convention center. The target market is young professionals employed in SoBro or the CBD. Recently sold for a record setting \$90 million. <http://www.olmstednashville.com/>
  - ✓ Solis North Gulch, 600 11<sup>th</sup> Ave N- a 271-unit, \$60 million, class A+ urban apartment community in Nashville, TN contiguous to the new 500,000 sf HCA headquarters building, the new 250,000 sf Lifeway headquarters building, and to Capital Views, a new urban mixed use project with an additional 300,000 sf of commercial now under construction. The target market is young professionals employed in the CBD. In lease up. [www.SolisNorthGulch.com](http://www.SolisNorthGulch.com)
  - ✓ 1505 Demonbreun- a 209-unit, \$42 million, class A+ urban apartment community in Nashville, TN on Nashville's famous Music Row. The target market is young professionals employed in the healthcare or music industries.  
[www.Live1505.com](http://www.Live1505.com)
  - ✓ Element Music Row- a 429-unit, \$90 million, class A+ urban apartment community in Nashville, TN on Nashville's famous Music Row. The target



market is young professionals employed in the healthcare or music industries.  
[www.ElementMusicRow.com](http://www.ElementMusicRow.com)

- ✓ Loft 135 Apartments- a 298-unit, \$46 million, class A+ urban apartment community in Charlotte, NC. The target market is young professionals employed in the central business district. <http://www.loftone35charlotte.com>
- ✓ The Park at Crossroads- a 344-unit, \$35 million, class A apartment community in Cary, NC. The target market is young professionals employed in the nearby Research Triangle Park area. More information is available at [www.ParkatCrossroads.com](http://www.ParkatCrossroads.com).
- ✓ Wellington Farms Apartments- a 236-unit, \$24 million apartment community in Columbia, SC. More information is available at [www.LiveatWellington.com](http://www.LiveatWellington.com).
- ✓ The Villas of Bella Sera- a 160-unit, \$40 million villa community in Matthews, NC. The target market for this project is individuals age 50 plus without children in the household. More information is available at <http://villas.bellaseravillas.com>.
- ✓ Glenmore Garden Villas- a 71 unit, \$30 million "empty nester" community located in the Ballantyne submarket of Charlotte, NC, featuring formal French gardens. More information is available at [www.GlenmoreGardenVillas.com](http://www.GlenmoreGardenVillas.com).
- ✓ Coventry Court- a 106-unit, \$17 million townhome community in the Ballantyne area of Charlotte, NC. The target market is couples and singles age 25-44. More information is available at [www.CoventryCourt.com](http://www.CoventryCourt.com)
- ✓ Chapel Watch Townhomes- a 126-unit, \$12 million community in Greensboro, NC. This is a condo conversion, with many residents buying their townhomes. More information is available at [www.ChapelWatch.com](http://www.ChapelWatch.com)
- ✓ The Park at Davidson- a 52-unit, \$10 million townhome community in Davidson, NC. The target market is couples and singles age 25-44. More information is available at [www.ParkatDavidson.com](http://www.ParkatDavidson.com)

#### The Altman Companies, Director, 1997 to 1998

- Prepared for disposition institutional-quality, class A apartment communities, such as:
  - ⇒ The Preserve at Ballantyne- a 302-unit, \$27 million project in Charlotte, NC
  - ⇒ The Tradition at Mallard Creek- a 360-unit, \$32 million project in Charlotte, NC
  - ⇒ Brook Arbor- a 302-unit, \$29 million project in Cary, NC. This project set the record for the highest sales price per unit of any apartment community in North Carolina. *This record stood unbroken for six years.*

#### Communications Specialists, President, 1995 to 1997

- Provided development and consulting services to multi-family owners and developers.
- Clients included GE Capital, United Dominion Realty Trust, Equity Residential Trust, and Fairfield Residential.
- Market experience in 40 out of the 50 states.

Leasing Legends, Field Agent, Director, Vice President, 1991 to 1995

- Analyzed, evaluated, and inspected multi-family developments nationwide for the purpose of setting up consulting assignments for our clients
- Generated action plans for the client which specifically calendar-ized what would occur, including success criteria by which the results could be judged
- Supervised each assignment by creating an environment in which our client's goals could be achieved
- Hired, trained, managed and motivated a staff to obtain these goals
- If you subscribe to the notion that we acquire wisdom from our mistakes rather than our successes, what was valuable about this experience was that I was exposed to, analyzed, and solved *virtually every problem that can possibly arise in the multi-family environment*.

Del American Properties, Manager, 1990 to 1991

- Apartment management in central Florida
- *Learned, during the recession, that risk is not just an academic concept*

Professional Affiliations

- Immediate Past President- Charlotte Home Builder's Association ([hbacharlotte.com](http://hbacharlotte.com))
- Past Chairman of Real Estate and Building Industry Coalition ([REBIC.com](http://REBIC.com))
- Past Chairman- Shelter Provider's Political Action Committee ([SPPACE-NC.com](http://SPPACE-NC.com))
- Board of Directors- Piedmont Public Policy Institute <http://www.pppiresearch.org/>
- Board of Directors- National Association of Home Builders ([NAHB.org](http://NAHB.org))



## DAVID LYNN, Ph.D., CRE

[https://www.linkedin.com/](https://www.linkedin.com/davidjlynn01@gmail.com)

[davidjlynn01@gmail.com](mailto:davidjlynn01@gmail.com)

646-541-0497

David Lynn has a highly-successful track record of investing in real estate investments in the United States and globally. Lynn has invested in over 220 transactions totaling over \$15 billion over the course of his career. Lynn possesses extensive experience in the five major real estate asset classes including industrial, office, retail, multifamily, hotel and three niche asset classes. Lynn founded, led and sold Everest Medical Properties to a leading, \$95 billion global multinational firm, achieving an equity multiple of 40. Everest achieved excellent investment returns on \$230 million AUM (20 properties) in ten states. Lynn managed the overall firm's activities including investment strategy, sourcing, research, acquisitions, underwriting, equity and debt financing, portfolio management, leasing, repositioning/value-add activities and financial reporting. Prior to founding Everest in 2015, Lynn was CIO and Executive Vice President at Cole Investments where he managed the firm's \$12.3 billion dollar investments including acquisitions and portfolio management. He was a member of the Executive Committee, the Investment Committee and the Operating Committee. At Cole, the team executed two REIT sales and one \$8 billion dollar REIT IPO on the NYSE. These capital markets executions were some of the most successful in modern real estate history. Lynn is the winner of the "Best Equity Deal of 2019" awarded by Real Estate Finance and Investment (REFI).

Prior to Cole, Lynn was a Partner and Managing Director at ING Clarion Partners (ING was one of the world's largest and most successful real estate asset managers at \$130 billion in assets), where he was Global Head of Strategy and Head of Research, leading all the firm's strategic and tactical investment decisions for the \$45 billion portfolio. As a key member of the Investment Committee, he helped lead strategies and investments across five asset classes, four niches, several open-and-closed-ended funds, three publicly-traded REITs, and eight separate accounts, working with over 150 institutional clients. He created and led several niche strategies including senior housing, student housing, storage and medical office. Lynn's work helped propel Clarion from a bottom-quartile performer to a top-quartile performer through his strategic and tactical guidance. Prior to ING Clarion, Lynn was Head of Strategy for AIG Global Real Estate, where he led real estate investment strategy across five asset classes and four niche strategies around the world. Lynn led AIGGRE into China, India, Brazil, Latin America, and several new and highly profitable strategies in the US and abroad, helping AIGGRE to achieve a portfolio equity IRR of 34%. He led multifamily development for AvalonBay in Northern California, where he developed several large and highly successful multifamily apartment communities. He was Head of Regional Investments for the Keppel Corporation (one of the largest property groups in Singapore comprising a \$43 billion portfolio) where he purchased, developed and managed multi-family housing, office buildings, medical buildings, mixed-use and retail around the Southeast Asia region and London, UK. Lynn was a national development manager with the Target Corporation, developing retail all around the US, responsible for all phases of development, including entitlements, development and construction management and tenant coordination.

Lynn's academic credentials were earned at leading universities. He earned his Ph.D. and MS in Financial Economics at the London School of Economics. His Ph.D. dissertation, later published in book form, broke new ground in finance theory. He earned a Master of Business Administration (MBA) from the Sloan School of Management, MIT, where he was a Sloan Fellow. He earned an MA at Cornell University in Planning and Real Estate where he was a Cornell Professional Scholarship recipient and a New York Urban Fellow. He earned a BA in Architecture from the University of California at Berkeley, where he was the recipient of three academic scholarships. Lynn is a Counselor of Real Estate, a ULI Council Member, a Homer Hoyt Fellow, a former Cornell AAP Advisory Board Member, and a recipient of many awards including "Best Equity Deal of 2019" awarded by "Real Estate Finance and Investment." Lynn is a preeminent industry researcher, economist, author and thought-leader. He has written six critically-acclaimed books and over 80 widely-referenced articles in the industry including: *Active Private Equity Real Estate Strategy* (John Wiley and Sons 2009), *Emerging Market Real Estate Investment* (John Wiley and Sons, 2010) and *Real Estate Mathematics* (Private Equity International 2011), and *The Investor's Guide to Commercial Real Estate Investment* (ULI 2015). "The Tectonic Forces of Global Real Estate" article is one of his many industry classics. Lynn's real estate and economic forecasts are viewed as among the most predictive and rigorous in the industry.

**JULES "JAY" H. MARLING IV, MAI, CRE, FRICS**  
**CEO & MANAGING PRINCIPAL**



Jules "Jay" Marling, CEO, Managing Principal, and Founder of Capright, has been active in the real estate industry since 1993.

To date, Mr. Marling has personally completed or supervised valuation assignments encompassing more than 15,000 institutional assets throughout the United States. These assignments, which involve virtually all types of commercial real estate, have been prepared for institutional clients including pension funds, trusts, corporations, lenders, and legal counsel.

Mr. Marling currently oversees several large valuation and consulting engagements throughout Latin America. Fluent in Portuguese and conversational in Spanish, Mr. Marling and his team of multi-lingual/multi-cultural experts have pioneered the modern valuation process and IVS/IFRS compliance for real estate funds with assets in Brazil, Mexico, and Colombia.

In addition to his valuation experience, Mr. Marling has provided clients with consulting expertise in the following areas: due diligence, feasibility, property tax appeal, condominium conversion, re-development planning, and litigation support.

**EDUCATION:**

***University of Chicago - Booth School of Business  
Chicago, Illinois***

- MBA - Finance and Economics

***Northwestern University - College of Arts & Sciences  
Evanston, Illinois***

- BA - Philosophy
- Magna Cum Laude and Departmental Honors
- Admitted to Phi Beta Kappa and Golden Key National Honor Society

**AFFILIATIONS:**

***Appraisal Institute***

- Designated Member of the Appraisal Institute (MAI)

***The Counselors of Real Estate***

- Counselor of Real Estate (CRE)

***Royal Institution of Chartered Surveyors***

- Fellow (FRICS)

***National Council of Real Estate Investment Fiduciaries (NCREIF)***

- Past Chair of the Valuation Committee

***State Licenses***

- Real Estate Broker in Illinois
- Certified General Real Estate Appraiser (Numerous States)



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**Mark McDonald** · 3rd  
Partner at Oldacre McDonald, LLC  
Nashville, Tennessee · 500+ connections · [Contact info](#)

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- Oldacre McDonald, LLC
- Vanderbilt University

### Experience



**Partner**  
Oldacre McDonald, LLC  
2012 – Present · 7 yrs  
Greater Nashville Area, TN



**Co-founder**  
Taigan.com  
2008 – Present · 11 yrs

**Chairman**  
Value Payment Systems, LLC  
2007 – Present · 12 yrs

**Partner**  
Newton Oldacre McDonald, LLC  
1990 – 2012 · 22 yrs  
Greater Nashville Area, TN

### Education

Vanderbilt University



### Promoted

- Online MS in Data Science**  
Gain data expertise and become a data scientist.
- \$500/hr Advisory Roles**  
Many companies are looking for paid Business Advisors. Are you interested?
- 24 month Master's in Ed.**  
Earn your Master of Education in Curriculum and Instructional Strategies

### People Also Viewed

- Bill Oldacre** · 3rd  
Partner at Oldacre McDonald, LLC
- Abby Parker** · 3rd  
Co-Founder at startup to be announced
- Tim Dearman** · 3rd  
President at Oldacre McDonald, LLC
- David Bailey** · 3rd  
Development Manager at Oldacre McDonald, LLC
- Debbie Sloan** · 3rd  
Paralegal at Oldacre McDonald, LLC

### Messaging

- Search messages
- Sokol Zace**  
Sponsored · Invitation to ...
  - Cassie from LinkedIn Premium**  
LinkedIn Offer · Reactivate your ...
  - Jose I Tejada T**  
You: 📄
  - Marcio A.**  
Sponsored · Software that ...
  - Paul Culpepper**  
Paul: Glad to hear that Larisa ...
  - Robert D. (Bob) Grace**  
You: of course I remember you, B ...
  - Cassie from LinkedIn Premium**  
LinkedIn Offer · Reactivate your ...
  - Marcio A.**  
Sponsored · Software that walks ...
  - Sopon Pornchokchai, PhD D...**  
Sopon: Hi How are you? Real Esta ...
  - John Slania**  
Sponsored · Digital Media Caree...
  - Samantha Michaeloff**  
Samantha Michaeloff is now a co ...
- Kate at LinkedIn

**Julie L. Melander, CRE**  
**Real Estate Counselor**  
**Clearlake, FL**

Julie Melander, CRE, is a commercial real estate professional with expertise in asset management, capital structuring and portfolio management. She is a strategic thinker and self-starter, recognized for her ability to manage complex real estate investments, maximize returns and minimize risks. During her career, she has been an advisor or principal investing in a wide range of commercial real estate investments, from the development of complex mixed-use projects in urban markets to distressed debt portfolios.

She started her career as a construction lender in Chicago, has worked for the Resolution Trust Company as a litigation review specialist, run distressed loan acquisition and workout departments for some of the largest firms in the business, operated her own advisory firm for ten years working closely with a Wall Street investment bank to invest in development opportunities nationwide and was the Chief Investment Officer for a real estate development company managing several private equity and New Market Tax Credit funds. Currently, Julie serves as the 2019 Chair of The Counselors of Real Estate Board.

She earned an MBA in finance from University of Chicago and an undergraduate degree in finance and accounting from Indiana University and is a Georgia licensed real estate broker.



## Arthur J. Mirante, II

### PRINCIPAL, TRI-STATE PRESIDENT OFFICE LEASING

#### **New York**

1166 Avenue of the Americas  
15th Floor  
New York, NY 10036 US

**Email** [arthur.mirante@avisonyoung.com](mailto:arthur.mirante@avisonyoung.com)

Arthur J. Mirante II joined Avison Young in 2012 as a Principal and Tri-State President, based in the firm's New York City office. One of the most accomplished and respected professionals in the commercial real estate industry, Mirante serves as a member of Avison Young's Board of Directors.

Prior to joining Avison Young, Mirante worked at Cushman & Wakefield for more than 40 years, where he most recently served as President of Global Client Development. Prior to that, he served as the firm's CEO for 20 years.

During Mirante's tenure as CEO, Cushman & Wakefield's revenues increased from \$100 million to \$1 billion and the firm expanded from 60 U.S. offices to 173 offices, including 100 outside the country.

Throughout his career, Mirante has participated in some of the New York market's largest and most complex transactions, including the sale of the World Trade Center, the headquarters relocations of MasterCard International and The Guardian Life Insurance Company, the record \$1.72 billion sale of 200 Park Avenue for Metropolitan Life in 2005, the record \$1.8 billion acquisition of 666 Fifth Avenue in 2007, and the long-term lease of 75 Rockefeller Plaza to RXR in 2013.

## Credentials

### Professional Credentials

- John Jay College of Criminal Justice
- The Alvin Ailey Dance Foundation

- The National Jewish Center for Immunology and Respiratory Medicine
- HELP USA

**Many community and cultural institutions have honored Mr. Mirante, including:**

- Lincoln Center for the Performing Arts
- St. John's University
- The College of the Holy Cross
- The Arts & Business Council named Mirante Business Volunteer of the Year (2003)
- Named the "Best International Real Estate Professional" by the leading European real estate exhibition and symposium
- Mirante and his wife, Elizabeth, were honored by the Alvin Ailey Dance and by John Jay College of Criminal Justice for their commitment to supporting the United States Veterans
- Covenant House Lifeline Achievement Award
- In addition, Mirante is a Founder, Shareholder and Member of the Board of a Community Bank in Livingston, New Jersey known as Regal Bank

## Notable Recent Responsibilities

**Represents the Following Owner/Landlords as Exclusive Office Leasing Agents:**

- RXR - 530 Fifth Avenue
- Thor Equities - 8 building portfolio with 800,000 SF
- Kamber Management - Tower 45
- Paramount Leasehold, LP - 1501 Broadway

## Education

- College of the Holy Cross - B.S., Sociology, 1965
- St. John's University Law School - J.D., 1968; and Doctor of Humane Letters



## **K. “Teya” Moore, Esq., CRE**

K. “Teya” Moore, Esq., CCIM, CRE has extensive experience with asset-based or secured and unsecured financing techniques, project financing (such as mergers and acquisitions, private equity and debt offerings) including non- acquisitive reorganizations, asset dispositions and asset recovery. He has served as legal counsel (finance) to the Maryland Energy Administration and Office of the Attorney General, State of Maryland, to help finance energy efficient measures statewide and to large institutional lenders where he structured or facilitated complex transactions for Barclays Business Credit, Inc., Bank of New York and Wells Fargo Bank.

Mr. Moore served two (2) terms on the Board of Directors of EBDI, a public- private partnership established to oversee the redevelopment of East Baltimore. In 2014 he was reengaged by the Annie E. Casey Foundation and its partners - Johns Hopkins University, Baltimore City and EBDI, to help manage a community and economic development fund for reinvestment in local businesses. He has chaired a number of vital local county public policy initiatives and he served over ten (10) years as special counsel to the office of Research and Technology Applications at Fort Detrick, Maryland, where he structured complex joint ventures and technology exchanges to promote privatization of military technologies with national implications for the public benefit.

Mr. Moore is admitted to the bar in the States of Maryland, New York and the District of Columbia and is a licensed broker in Maryland and the District of Columbia. He is the Managing Partner of Moore & Associates ([www.kteyamoore.com](http://www.kteyamoore.com)), and the Principal Broker of Benjamin & Banks Real Estate, LLC ([www.benjaminandbanks.com](http://www.benjaminandbanks.com)). Mr. Moore has a Juris Doctorate from New York University School of Law and an LL.M. (Masters in Taxation) from Georgetown University, Law Center.

### ***Public Sector Clients***

- Maryland – National Capital Park and Planning Commission
- Baltimore City Delegation
- Prince George’s County, Redevelopment Authority
- State of Maryland, Office of the Attorney General
- U. S. Department of Treasury, under the Special Inspector General for Troubled Asset Relief
- Walter Reed Army Institute of Research, a United States Department of Defense Policy and Research Institute
- Maryland Energy Administration

### ***Honors***

Riesman Award (Outstanding Scholastic and Community Service).  
Distinguished Community Service Award, Baltimore City Council.  
NASDB – Small Business Advocate of the Year Award.  
Proclamation, Chair (Equine Industry): Prince George’s County Council.  
CCIM Jay W. Levine Academy, the “Susan J. Groeneveld Award of Excellence.  
M-H AV honor, highest rating for legal ability and ethical standards: 23 years.

### ***Speeches, Publications and Industry Outreach***

A Wealth Disparity Study – A Shattered Foundation: Revisited, Washington Post Op-Ed  
Crowdfunding: *A Forward-Looking Overview*, CCIM Presentation (2015)  
Taking Stock: *An Equity Stake in Private Industry*, TEDCO Presentation (2004)  
SBA Panelist: Dept. of Transportation “Small Business Ventures” (2002)

### ***Appointments/Engagements***

Currently: **Legal & CRE Broker Activities**: Manages up to 1M sq. ft. of retail/office space

2019: **Presidential Liaison**, Membership - CCIM Institute National  
Finance Committee as Member Services President-Elect Liaison  
Strategic Planning Committee as Member Services President-Elect Liaison  
Ward Center for Real Estate Studies Subcommittee  
2018: **Chair**, NAR Commercial Legislative and Regulatory Advisory Board  
2017: Invited to The Counselors of Real Estate, **CRE credential** awarded  
2017: **Vice Chair**, NAR Commercial Legislative and Regulatory Advisory Board  
2017 – 2019: **Member**, CCIM Board of Directors (3 Year Appointment)  
2017: **Member**, CCIM Board of Directors - Mid-Atlantic Chapter (DC/MD/VA)  
2016: **Member**, Real Estate Roundtable, Real Estate Capital Advisory Committee  
2016: **RVP**, CCIM Region 10 (DC, MD, VA, PA, Del., & NJ)  
2016: **Chair**, CCIM Government Affairs Committee on Commercial Real Estate  
2015: **Immediate Past-President**: CCIM Mid-Atlantic Chapter (DC/MD/VA)  
2013 – 2014: **CRE Broker and Legal Counsel** - PG County Redevelopment Authority  
2012 – 2014: **CRE Consultant** - M-NCPPC (Westphalia)  
2002 – 2014: **Eco & Comm Dev Advisor** – EBDI: Johns Hopkins Life Science Project  
2013: **Chair**, Prince George’s County COC Symposium and 22 Member Work Group  
2010 – 2011: **Chair**, Prince George’s County Equine Industry Task Force

**Jim Myers**

Award Winning Writer, Journalist, and Former Restaurant Critic

Jim Myers is an award-winning writer, journalist and former restaurant critic who has covered the Nashville food and drink scene for more than 20 years.

He served as a judge for the prestigious James Beard Awards and holds the honorary title of Colonel in both Kentucky and Tennessee, though you can just call him Jim because he can't even get his 13-year-old son to call him Colonel.

His work has appeared in *Bon Appétit*, *USA Today*, *Garden & Gun*, *Nashville Lifestyles Magazine* and in "*Cornbread Nation: The Best of Southern food writing.*"

**John Oler, Founder  
Principal/CEO  
JSBO Realty & Capital Inc.**

John Oler is a real estate executive with 38 years' experience in the commercial real estate industry. As a commercial leasing and investment sales broker, executive and financial advisor/investment banker, he advises commercial tenants, private and institutional investors, property developers, family offices and non-profit organizations in devising strategic real estate plans and representing them when procuring, leasing, developing, financing and disposing of property and land for investment or occupation. His partners include tenured professionals in property development, private equity investing, mergers & acquisitions, landscape design, financial analysis, debt and equity capital markets, project management, construction and infrastructure finance, development and operations (ports and biomass to energy plants).

He enjoys longstanding relationships with New York City based commercial brokerage and consulting firms, institutional and "private credit" sources of real estate debt and equity and C-suite level executives in the many allied fields of real estate including legal, appraisal, market analysis, tax and wealth planning, environmental and engineering, land surveying, construction/project management and architecture/design. He taught for eight years in the NYU graduate real estate program the three levels of real estate finance courses as an Adjunct Professor after graduating from the same program in 1988. Oler is a member of The Counselors of Real Estate (CRE) organization.

## James S. "Jim" Olin

Jim Olin has been a leader in the hospitality, resort real estate and development industries since the 1980's. Jim is currently CEO of **C2G Advisors LLC**, a strategic consulting firm specializing in all facets of the hospitality industry, with special emphasis on short-term rentals and resort activities. The company also has a robust M&A operation, and **has been responsible for more M&A deals within the vacation rental industry than anyone else in history.** Olin was also part of a select negotiations team for one of the largest class action settlements in the history of the United States, and Jim continues to provide litigation consulting in the areas of hospitality and business economic loss. Cases range from being a corporate representative for real estate developers to slip-fall and other liability cases within the hospitality industry.

Previously, Jim was Managing Partner of **The Sterling Companies LLC**. He managed the merger of three of Northwest Florida's leading privately owned resort development, resort management and real estate sales companies into one powerful regional company servicing all facets of the resort industry. Until September 2008, the company managed over 1500 rental units, employed over 50 real estate agents, and had developed high-rise condominium projects throughout Destin and Panama City Beach, Florida..

Jim is the former President and CEO of **ResortQuest International** (NYSE: RZT), the world's largest vacation rental property management and resort real estate firm. Under his leadership at ResortQuest, Olin guided the network of more than **20,000 vacation rental and hotel properties in 52 premier resort destinations** and developed alliances and partnerships that gave ResortQuest a truly global reach. ResortQuest had more than 5,000 employees and managed a vacation rental portfolio valued at over \$7 billion. Olin also oversaw a real estate brokerage network of more than 350 agents, who traditionally managed in excess of \$1 billion in real estate listings.

Olin had been with ResortQuest and its subsidiaries for ten years. He was appointed COO of the company in January 2000 and was then promoted to President in April 2002. Previously, he was President and CEO of Abbott Resorts and Abbott Realty, based in Destin. As President and CEO of Abbott Resorts from 1992 until January 2000, Olin engineered the company's growth from 900 units to more than 2,500 units, and real estate sales from \$35 million to \$250 million annually. Olin also spearheaded the development and operations of Henderson Park Inn Bed and Breakfast, Tops'l Beach Resort, and Gulf Place Resort. Prior to joining Abbott Resorts, he served in various capacities within the tourism and economic development fields in Florida, beginning with the Florida Department of Commerce.

Jim is a licensed real estate broker in Florida, Alabama, Mississippi and Tennessee, and has been appointed to numerous State level committees and task forces by previous Florida Governors and Secretaries of Commerce. Jim is a member of both the prestigious Counselors of Real Estate (CRE), and the Council of Real Estate Broker Managers (CRB) – **he is one of only 8 persons currently invited to membership in both organizations simultaneously.**

Jim also has certifications from the National Association of Realtors as a Resort and Second Home Property Specialist (RSPS), and a Senior Real Estate Specialist (SRES). He is also a Certified Negotiations Expert (CNE), and a Fellow with the Royal Institute of Chartered Surveyors. Jim currently sits on the Board of Directors of Key Data Dashboard, and Board of Advisors for Host Compliance.

Olin is a former Research and Statistics Instructor at the University of Phoenix, and holds a Masters Degree from Florida State University. He is also a founding Board Member of the Onsite Property Managers Association (OPMA) and is a frequent speaker at the Vacation Rental Managers Association (VRMA) National Conference. Jim has been married for over 35 years to his beautiful wife, June, and they have 4 children and five grandchildren.



## VALERIE PONTIFF, CCIM

MANAGING PARTNER

617 558 5501 direct  
valerie.pontiff@mohrpartners.com

Mohr Partners, Inc.  
800 Boylston Street, 16th Floor  
Boston, MA 02199

### CREDENTIALS AND AWARDS

- Certified Commercial Investment Member (CCIM)
- Licensed Broker in the Commonwealth of Massachusetts and the States of Connecticut and New Hampshire
- Member Appraisal Institute
- General (Commercial) Appraiser in the Commonwealth of Massachusetts
- Nominee for CBA Downtown Office Deal of the Year 2015

### AFFILIATIONS

- Commercial Brokers Association (CBA)
- Commercial Real Estate Women (CREW) – Past Director (Seattle), Past Chair (Boston)

### EDUCATION

- University of Washington – *Bachelor of Arts, Economics and Finance, Master of Business Administration, Finance*

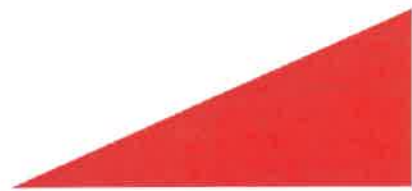
Valerie Pontiff, CCIM serves as Managing Partner for Mohr Partners, Inc. in the Northeast. Valerie specializes in counseling clients to align corporate real estate portfolios with business strategy.

Prior to joining Mohr Partners, Valerie was Founder and President of N.E. Property Advisors. Valerie provided concierge corporate real estate brokerage and advisory services to a group of clients with national portfolio growth needs.

Valerie began her career as Director, Valuation Advisory Services at Cushman & Wakefield. Following, Valerie was Vice President Brokerage at CBRE. She is recognized by her peers as a market leader and is known for her dedication, integrity, market knowledge and strategic thinking. Her clients represent a diverse range of industries including healthcare, retail, biotech, software, construction, engineering, education and government.

### REPRESENTATIVE CLIENT LISTING

Advanced Mirco Devices	Epicor	Regus
AdvanDX	General Dynamics	Right Movement
American Renal Associates	General Services Administration	Manpower
Ameriprise	Genex	Robert Half
Ariba	Green Hills Software	SAIC
Attunity	Honeywell Security	Terminix
BBA US Systems	Lightbridge	Tetra Tech
Boeing	Mpay	The Cambridge Homes
Boston University	MPI	TJX Companies
Bristol Myers Squibb	NAPAC	Vesbro
CDM Smith	Percussion Software	Verizon
Daramic	Regnante Stero and Osborne	VHB
Education Development		







# Marcus Rayner

VICE CHAIRMAN  
New York Brokerage



[marcus.rayner@colliers.com](mailto:marcus.rayner@colliers.com)

## CONTACT DETAILS

MOB +1 917 359 4699  
DIR +1 212 716 3750

Colliers International  
666 Fifth Avenue  
New York, NY 10103

[www.colliers.com](http://www.colliers.com)

## SPECIALTIES

Tenant Representation  
Owner Representation

## AREA OF EXPERTISE

Marcus Rayner is a Vice Chairman in Colliers International's New York office. He currently focuses on strategic planning and execution for tenants and the creation of innovative, effective marketing programs for available space. Mr. Rayner has worked with companies from across the industry spectrum, but specializes in real estate for the TAMI and legal sectors. He has also helped numerous high-growth companies develop real estate plans that provide for the complexities and uncertainties of their businesses.

## PROFESSIONAL ACCOMPLISHMENTS

Mr. Rayner has more than 30 years of real estate experience. He is a truly global professional with both a world perspective and a broad real estate background, having transacted on three continents and engaged in tenant and owner representation, investment sales, appraisal and development in the United States, Europe and Asia. In New York, Mr. Rayner's current market focus, he has completed more than 9 million square feet of transactions. He has also put together joint ventures between like-minded real estate companies, and then taken leadership roles in those new organizations.

Mr. Rayner is a trusted resource for the media on topics relating to commercial real estate and the New York market. NBC, Bloomberg, *The New York Times*, *The Wall Street Journal*, *Real Estate Weekly*, Business Insider and The Stoler Report are just a few of the publications and broadcast outlets in which he has been quoted or appeared.

## BUSINESS AND EDUCATIONAL BACKGROUND

Mr. Rayner began his real estate career as a Chartered Surveyor with Weatherall Green & Smith (now BNP Paribas Real Estate) in the United Kingdom. He eventually relocated to New York to manage the firm's U.S. business before it merged with Cresa. As Managing Principal, Mr. Rayner led the expansion of Cresa's tenant representation business in New York to approximately 40 professionals before joining Colliers in 2016.

Mr. Rayner earned a BSc in Estate Management from Oxford Brooks University and is qualified as an Associate of the Royal Institution of Chartered Surveyors (ARICS).

## COMMUNITY INVOLVEMENT

Mr. Rayner is an active member and leader of CoreNet Global. He currently serves as a New York Chapter Board Advisor and member of the organization's Global Issues Advocacy Group. He previously served as a Global Board member (2014-2015) and New York Chapter Chair/President/VP/Secretary (2009-2012). Mr. Rayner is a member of the Real Estate Board of New York (REBNY) and previously held a position on REBNY's Commercial Board of Directors (2011-2014).

He is on the Golf Committee for KidSave and former Vice Chair for the Board of the West Side YMCA.





**COLIN V. REED**  
**Chairman of the Board &**  
**Chief Executive Officer**

Colin V. Reed became chief executive officer of Ryman Hospitality Properties (formerly Gaylord Entertainment Company) in May 2001. Reed was named in August 2004 by the Company's board of directors as chairman and added those responsibilities in May 2005.

Since joining the Company, Reed has successfully led the Company's strategic reorganization as a hospitality and entertainment company through the Gaylord Hotels and Grand Ole Opry brands. In that time, he has led the Company's efforts to divest more than \$300 million in non-core assets, strengthened its balance sheet and repositioned it for future growth as a Real Estate Investment Trust with a rapidly-growing Entertainment segment.

Prior to joining the Company, Reed was chief financial officer and a member of the three-executive Office of the President for Harrah's Entertainment Inc. He joined that company in 1977 as a financial controller for its former Holiday Inn International Division.

From 1999-2001 he served on the board of directors of Harrah's Entertainment. Reed previously served on the Bass Pro Shops and Rite Aid board of directors and currently serves as lead director for First Horizon National Corporation. He also serves as the chair of the Tennessee Tourism Committee.

###

# Jeanette Rice, CRE

## Head of Multifamily Research, Americas

### Professional Experience

As CBRE's Americas Head of Multifamily Research and real estate economist, Jeanette Rice conducts high-level capital markets and property market analysis on the multifamily sector for CBRE's Capital Markets teams and clients.

Ms. Rice interprets the economic, market, and capital markets landscape at the national, metro and submarket level for the multifamily market. Included in her varied analyses are short-term and long-term multifamily demand drivers; cyclical supply-demand, occupancy and rent market dynamics; debt and equity investment activity and pricing trends. Ms. Rice provides investment strategy, risk and opportunity perspectives for multifamily owners and investors.

Ms. Rice joined CBRE in September 2014 and has more than 30 years of experience as a senior-level economist, market analyst and investment strategist. This includes comparative market analysis, metro market selection, submarket selection, product strategy, pricing/ risk analysis and other investment strategies for internal and client investment decisions.

Prior to joining CBRE, Ms. Rice led her own consulting practice (Rice Consulting LLC). She has also held senior management positions and led research activity at Verde Realty, Crescent Real Estate, Lend Lease Real Estate Investments and HFF LP.

### Professional Affiliations/Accreditations

- NMHC Research Committee
- Real Estate Research Institute (RERI) Fellow
- Homer Hoyt Fellow
- CRE. Counselor of Real Estate
- Texas Real Estate Salesperson License

### Education

- University of Chicago, Two years towards doctoral degree in urban geography
- M.A., Queen's University (Ontario, Canada), Urban Geography
- B.A., University of Washington (Seattle), History

**Scott Selig**  
**Associate Vice President of Capital Assets and Real Estate**  
**Duke University**

Scott Selig is the Associate Vice President of Capital Assets and Real Estate for Duke University. Scott has 30+ years of experience in both the public and private sectors of the commercial real estate industry.

He is charged with developing and implementing the overall real estate strategy for Duke University and the Duke University Health System. He plays a major role in the development and revitalization of downtown Durham for Duke. He is a member of the Research Triangle Park (RTP) Real Estate Development Committee.

The Duke Real Estate lease portfolio contains more than 250 leases encompassing approximately 4.0 Million square feet of medical, office, laboratory, and warehouse space. Scott is also responsible for the asset management of the Washington Duke Inn, a 271-room, 4-star hotel.

Scott holds an MBA from Duke University and a BA from the University of Washington in Seattle. His career has been split between Raleigh/Durham North Carolina, Hot Springs Arkansas, and Seattle Washington. Scott and his wife, Kris, are the proud parents of 4 grown children.



**NOAH D. SHLAES, CRE, FRICS**  
**Innovation and Implementation**  
**Lead – NGKF Vision**



Newmark Grubb Knight Frank  
Global Corporate Services  
125 South Wacker Drive  
Suite 2550  
Chicago, IL 60606  
nshlaes@ngkf.com  
T 312.857.6624

**Years of Experience**

33

**Areas of Specialization**

- ♦ Data management
- ♦ Portfolio Planning
- ♦ Real Estate Technology
- ♦ Corporate Real Estate Strategy

**Professional Background**

Mr. Shlaes leads the Innovation and Implementation team for NGKF's Vision platform for corporate real estate services delivery. The Vision platform is used by international corporations to manage all aspects of corporate real estate, including facilities management, space planning, transaction management, lease administration, and capital project planning.

Shlaes is responsible for the creation of a community of users, both internal and external, which provides and evaluates best practices as part of this platform. In addition, he is responsible for training, technical support and ongoing data management for the platform.

He joined Newmark Grubb Knight Frank from Grubb & Ellis, where he led the Strategic Consulting group. Earlier, he worked at Arthur Andersen, culminating in his role as Director of Corporate Real Estate Services.

Mr. Shlaes has advised international banks, utilities, manufacturers, railroads, universities, health systems and governments. His work has evolved from early efforts in valuation and technology development, and his expertise draws on his decades of supporting corporate real estate decisions.

Prior to his work with NGKF Vision, he created the Grubb & Ellis proprietary Thinking Tool and Portfolio Pulse for portfolio planning, and has published articles on portfolio planning, real estate strategy, software selection, and the valuation of Brownfield properties. He has also taught real estate valuation at the graduate level and overseas, and served as a guest lecturer and instructor at DePaul University's Kellstadt GSB, Boston College, the School of the Art Institute, and CoreNet Global.

Current clients include Dow, Cummins, Huawei, and Reed Elsevier. Past clients include Alcoa, Arden Realty, Inc., Arthur J. Gallagher & Company, City of San Diego, Conoco Phillips, Equity Office Properties Trust, Georgia-Pacific, Hewitt Associates, Kamehameha Schools, Microsoft, The Ohio State University, Port Authority of New York and New Jersey, Roosevelt University, Starwood Hospitality, Union Pacific Railroad, US Postal Service, US Sprint, Waste Management, and Vornado Realty Trust.

**Education**

Mr. Shlaes has a Bachelor of Science in Economics from the University of Michigan.

**Professional Affiliations**

- ♦ Counselors of Real Estate – Chair of the Board of Directors (2014)
- ♦ Member, Lambda Alpha International
- ♦ Advisory Board - CoRE Tech
- ♦ Editorial Board – *Area Development*
- ♦ Fellow, Royal Institution of Chartered Surveyors (FRICS)
- ♦ Hoyt Fellow – Homer Hoyt Advanced Studies Institute
- ♦ President, Realty Club of Chicago (2001)
- ♦ Steering Committee Member – Department of Energy - Commercial Real Estate Alliance

**Geoffrey Stricker**  
**Senior Managing Director**  
**Edgemoor Infrastructure & Real Estate**

Geoff plays an instrumental role in developing public-private opportunities for Edgemoor in the fields of higher education, aviation, K-12 education, and transportation. Geoff led the development efforts and oversaw the financial and transaction structuring for a number of Edgemoor's P3 projects, including the UCSF Sandler Neurosciences Building, the 55-acre Central District Development project for the University of Kansas, Long and Kimmy Nguyen Building at George Mason University, and the Kansas City International Airport New Terminal project.



**Margie Thessin**  
**Founder, Franklin on Foot**

Visitors of all ages have enjoyed my guided walking tours of historic Franklin, Tennessee since 1997. I have a law degree, but history is my passion, and there's no better place than Franklin to pursue this interest. From the original Franklin city tour, I've developed crime, Civil War, ghosts, cemetery, children's tours and even food tours, all within Franklin's historic center. I've also written two books on Franklin, and am working on the third one.

Visitors often tell me, "I can really tell you love what you do. " And I do! And I love to share it with visitors through storytelling. I really believe there's no better way to experience a place than on a guided walking tour. . . and I hope you'll join me on mine.



**MARILEE A. UTTER, CRE**

Marilee Utter is President and founder of Citiventure Associates, LLC, a real estate advisory firm focused on development strategy, and offering particular expertise in Public-Private Partnerships (P3s), Transit-Oriented Developments (TOD), and transformational real estate.

Previously, she was Executive Vice President of the Urban Land Institute, a Washington DC-based global non-profit of 40,000+ members known for real estate best practices and cutting-edge thinking. Her responsibilities included oversight of staff, operations, and local impact for offices in 75 cities around the world.

Prior to that, Marilee's experience included Managing Partner for P3 West LLC, Regional Vice President with Trillium Corporation managing the land development revitalization of Denver's Central Platte Valley rail yards, Mayoral-appointed Director of the Office of Asset Management for the City and County of Denver, first manager of Department of Transit-Oriented Development for the (Denver) Regional Transit District, Vice President with (now) Wells Fargo Bank, and secondary math teacher.

With this unique background, Marilee has become a nationally known speaker, writer, and advisor on innovative approaches to community redevelopment and urban issues.

Marilee holds an MBA from UCLA's Anderson School, a certificate in State and Local Public Policy from Harvard's Kennedy School, and a designation from the Counselors of Real Estate (CRE) where she is global Chair-elect. She is adjunct faculty at University of Colorado Denver, national Trustee for the Urban Land Institute and past Chair of the Colorado District Council. Currently, she is Chair for the Metropolitan State University of Denver Foundation Board, serves on National Charrette Institute Board of Advisors, and is a member of the International Women's Forum.