



Lori Alford

**LORI ALFORD**, *Co-Found & Chief Operating Officer, Avanti Senior Living*

As a Co-Founder and Chief Operating Officer of Avanti Senior Living, Alford is known as one of the industry's leading and most respected innovators of development, design and programming. Her future-forward vision and passion for the industry are paired with a history of implementing change at organizations of varying sizes and capacities.

For 20 years, she has been passionate about providing older adults with sophisticated living, state-of-the-art technology, and wellness that surpasses the highest benchmark. Throughout her career, Alford has embraced the "disruptive theory" and has explored ways to challenge the status quo to improve the life of seniors and workplace environment.

Lori is actively involved in numerous industry advisory roles and boards including National Investment Committee, American Senior Housing Association, Urban Land Institute, Aging 2.0, Senior Living Innovation Forum and Environ-

ments for Aging Design. She is passionate for inspiring and mentoring women to achieve the best they can be professionally and personally.



Steve Blazejewski

**STEVE BLAZEJEWSKI**, *Managing Director, PGIM Real Estate*

Steve Blazejewski is a managing director at PGIM Real Estate and senior portfolio manager for the Senior Housing Partners (SHP) fund series. Based in Atlanta, Steve is responsible for managing all aspects of the SHP fund series including portfolio strategy, investment decisions, and management of the SHP team. The SHP funds are closed-end, discretionary, commingled funds focused on investments in the senior housing industry.

Prior to joining PGIM Real Estate in April 2012, Steve was a vice president of seniors housing at Welltower, Inc. (formerly Health Care REIT, Inc.), an S&P 500, publicly traded, equity REIT. At Welltower, he originated new investments and participated in a variety of corporate development, international expansion, and market presence initiatives.

Steve was previously a vice president of CSH, LLC, an affiliate of The Carlyle Group, a global private equity and asset management firm. At CSH, Steve identified new investment opportunities, and provided investment analysis and asset

management for over 25 seniors housing acquisitions on behalf of Carlyle's closed-end, diversified real estate funds.

As a nuclear-trained submarine officer in the United States Navy, Steve completed five operational submarine deployments in a variety of leadership roles, taught multiple accredited classes at the United States Naval Academy, and assisted in the creation of the Naval Academy's character development program.

Steve has a bachelor's degree from the United States Naval Academy and a master of business administration from the Smith School of Business at the University of Maryland. Steve serves on PGIM Real Estate's United States Management and Americas Executive Committees, and is an Executive Board member of the American Seniors Housing Association (ASHA). He was recognized as one of Real Estate Forum's "50 under 40" in 2014, previously served as PGIM Real Estate's representative to the Council on Foreign Relations, and was a charter member of the National Investment Center's (NIC) Future Leaders Council.



Daniel Madsen

**DAN MADSEN**, *Chairman & Chief Executive Officer, Leisure Care*

Dan Madsen has developed a combination of people, platform, and pipeline focused on changing the way business is done. He's a tireless and inspirational leader with the drive and vision to make Leisure Care not only a great company to work with, but also a great company to work for. Since 1988, his business philosophy has been simple—put people first, and positively impact the lives of employees, customers, and business associates every day. Dan's commitment to philanthropy has helped create a culture of giving, and his dedication to the industry has led to his involvement as a member of various boards, and the founding of the One Eighty Foundation.



Jayne Sallerson

**JAYNE SALLERSON**, *Chief Operating Officer, Charter Senior Living*

Jayne Sallerson is a seasoned veteran in the senior living industry is an investor, partner, and Chief Operating Officer at Charter Senior Living. For the past 25 years, she has served in various senior management roles for both large and small senior living organizations exposing her to over 750 communities throughout the United States. She has developed and executed sales and operational infrastructures where the net result has been increased revenue, reduced expenses and improved NOI. Her unique blend of both sales and operations experience allows for a balanced approach of driving NOI while keeping customer and employee satisfaction at the core of operating strategies. Most recently she served as Executive Vice President of Sales & Operations for Benchmark Senior Living and spent seven years as Executive Vice President of Sales and marketing for Emeritus Senior Living prior to the Brookdale merger. Jayne also has experience in software platforms specifically designed for Senior Housing. Jayne helped launch and was COO of SherpaCRM, a first of kind

CRM built to integrate Empathy with sales.

Jayne is a well-recognized within the Senior Housing Industry. She has served on multiple Argentum roundtables and is a frequent presenter on a variety of topics for the senior living industry's major national senior living conferences.



Kristen Paris, PhD

**KRISTEN PARIS**, *Vice President, Market Research, ProMatura Group*

Kristen joined ProMatura Group in 2012 and specializes in research methodologies, as well as statistical analyses and reporting. An integral part of the consumer research team at ProMatura, she is responsible for helping design, analyze and report the findings from telephone, mail, Internet and community planning seminar studies. She has worked on resident satisfaction and employee engagement/motivation studies in large and small markets across the United States, Canada, Australia and the UK. Kristen is also responsible for analyzing and reporting data from nationwide surveys for the ProMatura Group, American Seniors Housing Association (ASHA), and National Alliance on Mental Illness (NAMI), among others. She has prepared presentations and several award-winning publications of the data from many of these nationwide projects. Kristen received her Master's and Ph.D. in Experimental Social Psychology from The University of Mississippi.



Matt Phillips

**MATT PHILLIPS**, *Executive Vice President, Senior Lifestyle*

Education:

- BA, Saint Mary's University, Winona MN, 1983 (1st semester 1979 @ Creighton, University, Omaha NE), Dean's List and Basketball Captain 2 Yrs.
- JD, The John Marshall Law School, Chicago, IL, 1986, Full Scholarship, 1st in Class
- MBA, Northwestern University, Kellogg School of Management, Evanston IL, 1998

Professional Experience:

- Summer Intern, Bell, Boyd & Lloyd (now K&L Gates), Chicago IL, 1985
- Associate, 1986-93, Partner (Real Estate Group), 1993-97, Bell, Boyd & Lloyd
- VP and General Counsel, 1997-2002, Senior VP Development (Group Leader) 2002-06, Classic Residence by Hyatt (now Vi Senior Living), Chicago, IL
- Founder and President, 2006-2013, Integrated Development Group LLC, Northbrook, IL
- EVP Development (Group Leader), 2013-Present, Senior Lifestyle Corporation, Chicago, IL

Major Projects:

- Bell, Boyd: Represented real estate developers, investors and lenders on projects such as office buildings, retail centers, condominiums and apartments, golf course/single family home developments and a casino.
  - Classic Residence by Hyatt: As General Counsel, handled legal and regulatory matters, financings, acquisitions of senior living communities and development parcels, partnership and joint venture matters and legal matters related to senior living operations. As SVP of Development, lead a team that (1) acquired senior living communities and (2) acquired parcels and then developed them as entrance fee model Continuing Care Retirement Communities. Development projects were in Aventura, FL, Naples, FL, Lantana, FL, Palo Alto, CA, La Jolla, CA, Glenview, IL, Highlands Ranch, CO and Scottsdale, AZ (2). The team also developed an IL/AL community in Yonkers, NY.
  - Integrated Development Group: Partnered with the National Electrical Benefit Fund (NEBF) to acquire and do a gut job renovation of 850 Lake Shore Drive and convert it into 197 luxury apartments. Also partnered with NEBF to purchase a 59 acre parcel in Briarcliff Manor, NY, and obtain entitlements to develop a 325 unit senior living community (currently under construction by Senior Lifestyle).
  - Senior Lifestyle: Merged Integrated Development Group into Senior Lifestyle in 2013 and established a team to develop, construct and operate senior living communities until stabilized from an operations standpoint (after which the communities are transferred to the regional operations team). We have developed and opened 17 communities in that time (2 IL/AL/MC, 14 AL/MC & 1 MC), have 4 communities under construction (2 IL/AL/MC and 2 AL/MC), and have numerous projects in the development pipeline.
-



Ben Burke

**BEN BURKE**, *President– Senior Living, CA Ventures*

Ben Burke, President of Senior Living, oversees the implementation and execution of the senior living investment process. In this capacity, Ben focuses on project sourcing by identifying underserved markets/submarkets, site acquisition, contract negotiation, proforma and budget creation, operator selection and oversight, and strategic vision of the platform to maximize investor return.

Prior to joining CA, Ben was the Vice President of Development & Investor Relations at Spectrum Retirement Communities. While at Spectrum, he was directly involved in the development of 20 communities (~2,300 units) across nine states. Product types included independent living, assisted living, and memory care. Through these developments, Spectrum's portfolio grew from ~1,700 units to ~4,000 units.

Prior to joining Spectrum, Ben held positions with Archstone-Smith and CWCcapital. Ben graduated from the University of Denver with a BSBA in Real Estate.

---



Julie Ferguson

**JULIE FERGUSON**, *Director of Senior Living, Titan Fund Management*

As Director of Senior Living at Titan Development, Julie's responsibilities range from new site selection to asset management, development manager and site selection of limited partnership opportunities. She graduated from the Berger Entrepreneurship Program and has her Masters in Business Administration, both from the University of Arizona. After graduation, Julie worked for The Fountains; a senior housing owner, developer and operator for 11 years, acquiring and developing over \$350M in seniors housing projects. She spent four years with Jonathan Rose Companies developing low income housing tax credit projects in downtown Albuquerque. Prior to joining Titan she worked for Real Estate Advisors and CBRE as a commercial broker. She oversees a portfolio of approximately \$263M in senior housing assets, with \$86M funded by Titan Development's \$112M opportunistic private real estate fund.

---





Scott Stewart

**SCOTT STEWART**, *Founder & Managing Partner, Capitol Seniors Housing*

Scott Stewart is the Founder and Managing Partner of Capitol Seniors Housing (CSH), a national seniors housing investment firm. CSH is a joint venture partner with one of the largest university endowments in the United States. CSH also partners with The Carlyle Group (Carlyle), one of the world's largest private equity groups with \$183.0 billion under management. Both CSH and Carlyle are headquartered in Washington, D.C.

CSH was formed in the fall of 2003 with a mission to opportunistically acquire, develop and own independent living, assisted living and continuum of care retirement communities (CCRCs) in major U.S. markets. CSH utilizes third party operators to manage the facilities on a fee or joint venture basis.

To date, the company has amassed a nationwide portfolio of 75 assets valued at over \$1.5 billion. CSH has also realized a combined gross profit of \$550 million for its investors with the timely sale of certain assets within a ten year period. This track record has enabled the company to post an overall portfolio IRR in excess of 42%.

Prior to forming CSH, Mr. Stewart ran the Acquisitions Group for Sunrise Senior Living, one of the country's premier seniors housing service providers. Before that, he headed up the acquisitions, development and construction efforts for Homestead Village, Security Capital Group's extended-stay hotel company.

Mr. Stewart serves on the Boards of the American Seniors Housing Association (ASHA) and Hopecam, a non-profit organization. He is an Adjunct Professor at both Georgetown University and American University in Washington, DC, teaching real estate courses in both of the university's continuing education programs. Mr. Stewart is a member of the "Seven Continents Club," having run a marathon in all seven continents. He earned an MBA from Harvard Business School in Boston, Massachusetts and a BBA from The University of Michigan in Ann Arbor, Michigan.

---

**CHRISTOPHER ARRUDA**, *Principal, Helge Capital*



Christopher Arruda

Mr. Arruda currently serves as Principal of Boston based Helge Capital where he co-heads the capital raising, business strategy and property investment activities with Mr. Uritsky.

Mr. Arruda benefits from more than 25 years of broad real estate experience and has completed in excess of US \$1.2B of public and private real estate transactions throughout his career.

Previously Chris led acquisitions and sourced the first domestic institutional investor for an off-shore private multifamily investment platform. Additionally, Chris served in a variety of entrepreneurial and institutional settings including U.S. East Regional Director of Transactions and Asset Management with AIMCO (NYSE: AIV), Senior Investment Officer with Berkshire Wafra Advisors (now DB Berkshire Mortgage), and Seniors Housing Development Associate Leggat McCall Retirement Properties. Chris started his career as an Associate at Copley Real Estate Advisors (now AEW Capital Management). Chris earned an MBA Northeastern University where he served as an adjunct professor of Real Estate Capital Markets in Graduate School of Business and holds a BS in Accounting from Worcester State University.

---



Horst Schulze

**HORST SCHULTZE**, *Founding Member, The Ritz Carlton Hotel Company*

A legend and leader in the hotel world, Horst Schulze's teachings and vision have reshaped the concepts of service and hospitality across industries.

Mr. Schulze's professional life began more than 65 years ago as a server's assistant in a German resort town. Throughout the years he worked for both Hilton Hotels and Hyatt Hotels Corporation before becoming one of the founding members of The Ritz Carlton Hotel Company in 1983. There Mr. Schulze created the operating and service standards that have become world famous.

During his tenure at The Ritz Carlton, Mr. Schulze served as President and COO responsible for the \$2 billion operations worldwide. It was under his leadership that The Ritz Carlton Hotel Company was awarded the prestigious Malcolm Baldrige National Quality Award- twice- making it the first and only hotel company to ever win even one.

In 1991, Mr. Schulze was recognized as "corporate hotelier of the world" by HOTELS Magazine. In 1995, he was awarded the Ishikawa Medal for his personal contributions to the quality movement. In 1999, Johnson & Wales University gave him an honorary Doctor of Business Administration degree in Hospitality Management. Most recently, Mr. Schulze has been honored as a "Leader in Luxury" by Travel Agent Magazine and its sister publication Luxury Travel Advisor.

After leaving The Ritz Carlton Hotel Company, Mr. Schulze went on to found The Capella Hotel Group. This luxury hotel company managed some of the most elite properties worldwide, and gave Mr. Schulze the opportunity to further define the luxury hotel industry, receiving countless awards and recognitions.

Today, Mr. Schulze serves on various boards and acts as a consultant across industries. He is recently completed his seminal book on creating excellence, *Excellence Wins: A No-Nonsense Guide to Becoming the Best in a World of Compromise*.

