

**AGENDA**

- I. Chairman's Welcome  
Doug Schiffer, President & COO, Allegro Senior Living
- II. Approval of June 5, 2020 Executive Board Minutes
- III. Approval of New Executive Board Members  
  
*Approval of New Directors:*  
Confluent Senior Living, John Reinsma, Managing Director  
*Approval of New Representatives from Existing ASHA Board Member Firms:*  
Aaron Becker, Senior Vice President, Lancaster Pollard  
Tami Kozikowski, President and COO, The Waters Senior Living
- IV. Treasurer's Report  
Kathryn Sweeney, Co-Founder & Managing Partner- CIO, Blue Moon Capital
- V. Seniors Housing PAC Update  
Richard Hutchinson, CEO & Founder, Discovery Senior Living
- VI. Keynote Presentation  
Introduction by: Bill Kaplan, Chairman & Co-Founder, Senior Lifestyle  
Robert S. Kaplan, CEO, Federal Reserve Bank of Dallas  
Q&A Facilitator: Jerry Frumm, Vice Chairman & CIO, Senior Lifestyle
- VII. Remarks  
Nicholas Uehlecke, Advisor, Department of Health and Human Services
- VIII. Public Policy Update  
Jeanne McGlynn Delgado, Vice President of Government Affairs, ASHA  
Stuart Chapman, Partner, Thorn Run  
Randy Hardock, Partner, Davis & Harman LLP
- IX. Strategic Planning Update  
David Schless, President, ASHA
- X. Other Business

*Sponsorship Support Provided by:*

**SENIORS**  
**HOUSING BUSINESS**

A meeting of the Executive Board of the American Seniors Housing Association was held on June 5, 2020, at 2:00 pm Eastern in a virtual format due to the COVID-19 crisis.

The Chairman, Douglas Schiffer, called the meeting to order and welcomed members to the June Executive Board Meeting, which would have taken place in Carlsbad, CA during the 2020 Mid-Year Meeting.

A list of Directors present at the meeting, constituting a quorum of the Executive Board, is attached.

The Directors moved, seconded and carried (M/S/C) approval of the January 24, 2020 ASHA Executive Board Meeting Minutes.

The Board moved, seconded and carried (M/S/C) approval of the following new Executive Board Members:

BMO Harris Bank, Imran Javaid, Managing Director  
Lifespace Communities, Jesse Jantzen, President and CEO

The Board moved, seconded and carried (M/S/C) approval of the following new representatives from existing ASHA Board Member firms:

Curtis Brody, Chief Financial Officer, Hawthorn Senior Living  
Marie Carlson, SVP of Strategic Development and Chief Financial Officer, Lutheran Life Communities  
Kris Engslow, President, Aegis Living  
Danette Opaczewski, Chief Operating Officer, Revel Communities, The Wolff Companies

Kathryn Sweeney, Treasurer, delivered the Treasurer's Report, noting that ASHA's 2019 audit was successfully completed in May. The Treasurer thanked members of the Audit Committee, Susan Kayser, Esq. of Duane Morris and Laura McDonald, CPA of Protective Life Insurance for their service to the Executive Board. The Treasurer then provided an update about ASHA's Reserve Policy, which has been in place since 2007 and is comprised of two components, an Advocacy Reserve of \$2.5 million and Operating Expense Reserve equal to 150% of budgeted expense. ASHA's reserves are calculated using a straightforward formula of cash and cash equivalents plus investments, which are comprised of FDIC-insured laddered CDs. ASHA's current reserve is approximately \$6.7 million. The Treasurer further reported that ASHA had a solid first quarter, with a positive change in net assets of \$366,064, noting that the first quarter was not significantly impacted by the COVID pandemic.

ASHA's President, David Schless, then provided an assessment of the potential impact of the COVID crisis on the Association's revenue and expense expectations for the remainder of the year. The President concluded that membership dues and sponsorship revenue would both be below budget, and the Association would have significantly higher expenses than budgeted due to the launch of a large public relations campaign and additional legislative consulting expense associated with the COVID crisis.

Lynne Katzmann, Ph. D., Secretary, provided an update on ASHA's extensive public relations efforts that began at the outset of the COVID crisis. She described materials prepared for the members by ASHA's Crisis Communications Counsel, Ron Culp and Steve Johnson, which focused on effective strategies for speaking to the media and communicating with families. She further noted the dozens of media stories that ASHA has responded to since the outbreak of the crisis in March, and the immediate use of the Where You Live Matters (WYLM) digital platform to communicate about the industry response to the crisis.

The Secretary reported that a special section of the WYLM website was created in early April called "Senior Living Responds to COVID-19," and that social media including both Facebook and Instagram were used by ASHA to amplify the members reassuring and inspiring communications. A wide array of new COVID-related content was quickly created, such as "Understanding the Difference Between Assisted Living and a Nursing Home," and the WYLM website also utilized material created by ASHA members and collaborators, such as Eric Mendelsohn of NHI and Dr. Karl Pillemer of Cornell University.

The Secretary described samples of banner advertisements ([click here](#)) and video ([click here](#)) from the national public relations campaign that ASHA launched on May 11 in a number of the country's most influential media sites, including the *New York Times*, *Wall Street Journal*, *Washington Post*, *Atlanta Journal Constitution*, *Dallas Morning News*, *Los Angeles Times*, *Boston*

*Globe*, and on AARP's website. The Secretary concluded her update with some of the impressive metrics from the campaign's first weeks, including more than 6.5 million Total Impressions, over 437,000 Total Video Views, and close to 150,000 Total Engagements.

ASHA Vice President of Government Affairs, Jeanne McGlynn Delgado, provided a Legislative Update that focused on efforts to secure federal relief to cover expenses and lost revenue through the Public Health and Social Services Emergency Fund as part of the CARES Act. One of the Association's outside legislative consultants, Jamie Gregory of Calfee Strategic Solutions described the multi-faceted approach being taken to seek COVID-related liability protection and the Board discussed a COVID-related assisted living inquiry of 11 companies by Senators Warren and Markey of Massachusetts and Representative Maloney of New York.

Richard Hutchinson, Chairman of the Seniors Housing PAC, encouraged all members of the Executive Board to consider supporting the PAC if they had not already done so. To date, pledges and contributions total \$171,025 from 65 individuals, with 53 contributions at the Chairman's Circle level (\$2,000 or more). He also reminded members of the Executive Board that the 2020 Chairman's Circle Event for those who support the Seniors Housing PAC with voluntary, personal contributions of \$2,000 or more, would take place in Charleston, SC, November 5-6 at The Hotel Bennett. A Seniors Housing PAC brochure can be accessed by [clicking here](#), and those who wish to make their contributions with a personal credit card should contact Sheff Richey at [srichey@seniorshousing.org](mailto:srichey@seniorshousing.org).

A legal update was provided by Paul Gordon of Hanson Bridgett, ASHA's legal counsel, followed by an update on the insurance marketplace for seniors housing, which was provided by Michael Pokora of Willis Towers Watson.

The Executive Board Meeting concluded with an Industry Recovery Panel discussion that was moderated by ASHA Vice Chairman, Jerry Frumm, and featured Caryl Barnes of Bridge Investment Group, Sarabeth Hanson of Harbor Retirement Associates, and Karen Mlawsky of Watermark Retirement Communities.

There being no further business, the Executive Board Meeting was adjourned.

## **New Executive Board Nominees**

**John Reinsma** | Managing Director | Confluent Senior Living  
*Nominee*

John manages Confluent Senior Living's senior housing development program. John works closely with Confluent's operating partners to ensure the existing projects receive entitlements and approvals, and construction stays on schedule. John also identifies and pursues new markets and sites for future projects.

Prior to joining Confluent, John was a senior development manager for Weston Solutions, where he was responsible for all acquisitions and development in the Rocky Mountain region. His experience includes the development and financing of diverse product types, including office, retail, hospitality, industrial, multi-family and brownfield redevelopment. John has also held positions as an acquisitions manager with International Capital Partners, and he served as a strategy consultant with Accenture. He is active in the Denver real estate community and a member of NAIOP, ULI and the Denver Downtown Partnership.

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## New Representative from Existing Board Member Company

**Aaron Becker** | Senior Vice President | Lancaster Pollard

*Nominee*

Aaron Becker is a managing director and the head of seniors housing and health care production with ORIX Real Estate Capital (OREC), the combined company of Lancaster Pollard, RED Capital Group and Hunt Real Estate Capital. Aaron leads the firm's national efforts in providing capital funding for the senior living and health care sectors.

Since joining Lancaster Pollard in 2011, Aaron has completed over \$1.4 billion in transactions across the entire capital platform. Prior to Lancaster Pollard, he was with Sixpoint Partners, a global investment banking boutique specializing in alternative asset distribution and strategic advisory services. Before that, he was a vice president in Merrill Lynch's Healthcare Finance IB Group, where he structured public and private bond financings and structured over \$2 billion in derivatives.

Aaron earned a bachelor's degree in psychology from Indiana University and an MBA degree with honors from the University of North Carolina, Chapel Hill. He holds general securities representative (Series 7 and 63) and investment banking representative (Series 79) licenses.

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**Tami Kozikowski** | President & COO | The Waters Senior Living

*Nominee*

Appointed by the Board of Directors to lead the Company after the CEO/Founder unexpectedly passed away, then later affirmed at the Company's annual meeting. Responsible for all aspects of the business including operations, development, talent, strategy and financial outcomes. Leading through a health care crisis (Covid 19 pandemic) and instilling confidence in all stakeholders during a time of constant change and uncertainty by communicating consistently and calmly. This also includes ensuring adequate PPE, shepherding the brand through the media, determining appreciation pay standards for our frontline team members and planning for the changes to come with 'reopening'. Previous leadership roles include Executive Vice President roles at Life Time Fitness and at Advance Auto Parts, as well as Senior Vice President roles at Best Buy for over 16 years. Tami holds an MBA in Marketing and Finance from the UCLA Anderson School of Business. She began her career as a CPA in the state of California.

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**American Seniors Housing Association**  
**Statement of Financial Position**  
As of September 30, 2020

**ASSETS**

**Cash**

Checking/Savings	1,447,852
Investments	5,638,162
<b>Total Cash</b>	<u>7,086,014</u>

**Other Current Assets**

Accounts Receivable	890,854
Prepaid Expenses	23,456

**Total Current Assets** 914,310

**Other Assets**

Fixed Assets	20,770
457 Plan Asset	309,711
Uniglobal ER Match	55
Security Deposit	7,256

**Total Other Assets** 337,791

**TOTAL ASSETS** 8,338,115

**LIABILITIES & EQUITY**

**Liabilities**

**Current Liabilities**

Accounts Payable	100,960
Accrued Payroll	-
Accrued Vacation	102,594
Deferred Rent	43,633
Deferred Revenue	2,762,836

**Total Current Liabilities** 3,010,023

**Long Term Liabilities**

Long Term Capital Lease Liab	
457 Plan Liability	309,711

**Total Long Term Liabilities** 309,711

**Net Assets**

Unrestricted Net Assets	5,144,358
Change in Net Assets	(125,976)

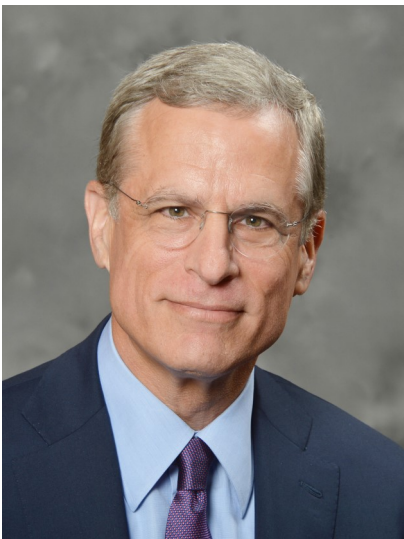
**Total Net Assets** 5,018,382

**TOTAL LIABILITIES & NET ASSETS** 8,338,115

**American Seniors Housing Association**  
**Revenue and Expense Summary**  
January through September 2020

<b>Revenue</b>		\$ 2,619,134
<b>Meeting Registration Fees</b>	158,025	
<b>Membership Dues</b>	1,924,550	
<b>Publication Sales</b>	25,098	
<b>Reimbursed Research Costs</b>	10,000	
<b>Sponsorships/Events</b>	315,000	
<b>Sponsorships/Publications</b>	68,000	
<b>Interest/Dividend Income</b>	118,461	
<b>Total Revenue</b>	<u>\$ 2,619,134</u>	
<b>Expense</b>		<u>\$ 2,745,110</u>
<b>Change in Net Assets</b>		\$ (125,976)
<b>Unrestricted Net Assets</b>		\$ 5,144,358
<b>Total Net Assets</b>		<u><u>\$ 5,018,382</u></u>

KEYNOTE SPEAKER | **Robert Steven Kaplan**



Robert Steven Kaplan has served as the 13th president and CEO of the Federal Reserve Bank of Dallas since September 8, 2015. He represents the Eleventh Federal Reserve District on the Federal Open Market Committee in the formulation of U.S. monetary policy and oversees the 1,200 employees of the Dallas Fed.

Kaplan was previously the Martin Marshall Professor of Management Practice and a Senior Associate Dean at Harvard Business School.

He is the author of several books, including *What You Really Need to Lead: The Power of Thinking and Acting Like an Owner*; *What You're Really Meant To Do: A Road Map for Reaching Your Unique Potential*; and *What to Ask the Person in the Mirror: Critical Questions for Becoming a More Effective Leader and Reaching Your Potential*.

Prior to joining Harvard in 2006, Kaplan was vice chairman of The Goldman Sachs Group, Inc. with global responsibility for the firm's Investment Banking and Investment Management Divisions. He became a partner in 1990 and served as co-chairman of the firm's Partnership Committee. He was also a member of the Management Committee.

Following his 23-year career at Goldman Sachs, Kaplan became a senior director of the firm.

He serves as chairman of Project A.L.S. and co-chairman of the Draper Richards Kaplan Foundation, a global venture philanthropy firm that invests in developing non-profit enterprises dedicated to addressing social issues. He is also a board member of Harvard Medical School.

Kaplan previously served on the boards of State Street Corporation, Harvard Management Company, Bed Bath & Beyond and Heidrick & Struggles International, Inc. He was also a trustee of the Ford Foundation, co-founding board chair of the TEAK Fellowship, co-founder and chairman of Indaba Capital Management, LP and chairman of the Investment Advisory Committee at Google, Inc.

Kaplan was appointed by the Governor of Kansas as a member of the Kansas Health Policy Authority Board.

Born and raised in Prairie Village, Kansas, Kaplan received a bachelor of science degree in business administration from the University of Kansas and a master's degree in business administration from Harvard Business School.



GUEST SPEAKER | **Nicholas Uehlecke**



Nicholas Uehlecke is currently an Advisor in the Immediate office of the Secretary at the Department of Health and Human Services. In his role, issues that he works on include Medicare, Medicaid, commercial and general insurance issues, health care reform and a range of other issues under the jurisdiction of CMS and HRSA. Nick also spends time working on issues related to regulatory burden relief, and efforts to make health care more value-based in America. He is also currently the HHS staff-lead on the Advancing American Kidney Health Initiative. Prior to this work, he was at the Committee on Ways and Means at the House of Representatives as Professional Staff for 8 years, working on issues ranging from Medicare's Parts A and B, Medicare Advantage and Part D, and commercial insurance and ACA reforms. Before Nick's time on Capitol Hill he spend nearly three years as an analyst for the Marwood group, working on health care as well as financial services, education, and energy policy. While having lived in many places Nick calls Texas home, and is a graduate of the University of Richmond.

**Preliminary Attendee List**

*As of October 2, 2020*

**Advent Group**

David A. Reeve	Vice President & General Counsel	Bellevue, WA
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**Aegis Living**

Kris Engskov	President	Bellevue, WA
Thomas Laborde	Senior Advisor	Napa, CA

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**AEW Capital Management, L.P.**

Anthony C. Crooks	Director	Boston, MA
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**ALG Senior**

Bryan Starnes	Chief Financial Officer	Hickory, NC
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**Allegro Management Company**

Jason Rock	Senior Vice President, Sales	Saint Louis, MO
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**Allegro Senior Living, LLC**

Robert B. Karn	Chief Financial Officer	St. Louis, MO
Laurence A. Schiffer	Chairman & CEO	St. Louis, MO
Douglas S. Schiffer	President & COO	Atlanta, GA
Eric Varin	Vice President Sales & Marketing	Atlanta, GA

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**Alliance Residential Company**

Dale Boyles	Managing Director, Senior Housing	San Diego, CA
Marco Vakili	Managing Director, Senior Housing	Carlsbad, CA

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**Ally Bank**

Whitney Johnston	Director	Bethesda, MD
Scott Rossbach	Senior Director	Bethesda, MD

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**American Healthcare Investors**

Eliza Gozar	Senior Vice President, Acquisitions	Irvine, CA
Danny Prosky	President, COO & Director	Irvine, CA

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**American House Senior Living Communities**

Kevin Carden	Senior Vice President, Acquisitions	Lake Forest, IL
Paul Stodulski	CFO & CAO	Southfield, MI
Dale Watchowski	Chief Executive Officer	Southfield, MI

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**American Seniors Housing Association**

Paul Bergeron	Vice President, Communications	Washington, DC
Meghan Bertoni	Manager, Member Services	Washington, DC
Doris K. Maultsby	Vice President, Member Services	Washington, DC
Jeanne McGlynn Delgado	Vice President, Government Affairs	Washington, DC
Sheffield Richey	Manager, Government Affairs	Washington, DC
David S. Schless	President	Washington, DC

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**Artemis Real Estate Partners**

Kelly Q. Sheehy	Managing Director - Healthcare Business	Atlanta, GA
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**Artis Senior Living Management, LLC**

Edward T. Yarish	President	King of Prussia, PA
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**Belmont Village Senior Living**

Nick Stewart	Director of Finance	Houston, TX
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**Benchmark Senior Living**

Brian Danaher	VP and Deputy General Counsel	Waltham, MA
Thomas H. Grape	Chairman & CEO	Waltham, MA
Lynda Maryanski	Senior Director of Investments	Waltham, MA

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**Berkshire Residential Investments**

Matthew F. Whitlock	CIO, Managing Director, Senior Housing	Boston, MA
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**Blue Moon Capital Partners, LP**

Chris Kronenberger	Managing Director, Investments	Boston, MA
Kathryn A. Sweeney	Co-Founder & Managing Partner- CIO	Boston, MA

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\* Invited Guest

**BMO Harris Healthcare Real Estate Finance**

Derek Zeller Director Chevy Chase, MD

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**Bridge Seniors**

Robb Chapin Chief Executive Officer Orlando, FL

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**Bridgewood Property Company**

James D. Gray Founder & CEO Houston, TX

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**Brightview Senior Living, LLC**

Doug Dollenberg, Jr. President Baltimore, MD

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**Brookdale**

Christian Maingot SVP, Owner Relations Tampa, FL

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**Capital Health Group, LLC**

Kenneth R. Assiran Managing Principal Baltimore, MD

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**Capital One Healthcare**

Dave Harper Managing Director Chicago, IL

Dana Scheppmann Senior Vice President Chicago, IL

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**Cedarbrook Senior Living**

Michael J. Damone President Troy, MI

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**Chicago Pacific Founders**

John P. Rijos Founding Operating Partner Chicago, IL

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**Clearwater Living**

Danielle Morgan President & COO Newport Beach, CA

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**CNL**

William Ham Director of Asset Management Orlando, FL

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**Colony Capital, Inc.**

Douglas W. Bath Managing Director Healthcare Bethesda, MD

Ron Jeanneault Managing Director Healthcare Bethesda, MD

Richard Welch Managing Director Los Angeles, CA

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\* Invited Guest

**Confluent Senior Living**

John Reinsma                                  Managing Director                                  Denver, CO

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**CPF Living / Grace Management, Inc.**

Guy Geller    President    Chicago, IL

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**Cushman & Wakefield**

Richard Swartz                                  Vice Chairman    Boston, MA

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**Discovery Senior Living**

Richard J. Hutchinson                                  CEO & Founder                                  Bonita Springs, FL

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**Diversified Healthcare Trust**

Jennifer Francis                                  President & COO    Newton, MA

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**Duane Morris LLP**

Susan V. Kayser                                  Partner    New York, NY

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**Eclipse Senior Living, Inc.**

Kai Hsiao    Chief Executive Officer                                  Lake Oswego, OR

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**Enlivant**

Daniel Guill    Chief Operating Officer                                  Chicago, IL

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**ERDMAN**

Todd Hudgins                                  SVP, Senior Living                                  Jensen Beach, FL

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**Erickson Living**

Scott Gensler                                  VP, Business Development &  
Regulatory Affairs                                  Catonsville, MD

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**Evergreen Senior Living Properties, LLC**

Chris Coates                                  President & CEO    Irving, TX

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**Formation Capital, LLC**

Sheryl Marcet                                  Managing Director    Hinsdale, IL

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**Foster Senior Living**

John Foster    Chief Executive Officer                                  Springfield, MO

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\* Invited Guest

**Franklin Companies**

Kevin Wilbur Chief Operating Officer San Antonio, TX

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**Freddie Mac**

Steven Schmidt National Director, Senior Housing Chicago, IL

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**Frontier Management, LLC**

Greg Roderick CEO & President Portland, OR

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**The Gatesworth Communities**

David A. Smith Co-Founder & CEO Saint Louis, MO

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**GlenAire HealthCare, LLC**

James P. Bowe \* Principal Sturgis, MI

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**Grandbridge Real Estate Capital, LLC**

Richard A. Thomas Senior Vice President Atlanta, GA

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**Greystar**

Mitch Brown Senior Managing Director Newport Beach, CA

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**Greystone**

Neal Raburn Managing Director, Seniors Housing  
Finance Atlanta, GA

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**Hanson Bridgett, LLP**

Joel S. Goldman Partner San Francisco, CA

Deidre A. Schonfeldt Partner San Francisco, CA

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**Hawthorn Senior Living**

Jon Ollmann Chief Operating Officer Vancouver, WA

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**HealthTrust**

Colleen H. Blumenthal Managing Director Sarasota, FL

Alan C. Plush President Sarasota, FL

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\* Invited Guest

**HJ Sims**

Brett Edwards	Assistant Vice President	Austin, TX
Brady Johnson	Senior Vice President	San Clemente, CA
Curtis King	Senior Vice President	Austin, TX
R. Jeffrey Sands	Managing Principal / General Counsel	Fairfield, CT

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**Houlihan Lokey**

Matthew Ryan	Managing Director	Chicago, IL
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**JLL Capital Markets - Seniors Housing**

Michael Garbers	Managing Director	Orlando, FL
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**Juniper Communities**

Lynne Katzmann, Ph.D.	President & CEO	Bloomfield, NJ
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**KeyBank Real Estate Capital**

Brian Heagler	Senior Vice President & Senior Banker	Seattle, WA
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**Kisco Senior Living, LLC**

Mitch Ritschel	Chief Investment Officer	Carlsbad, CA
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**Lancaster Pollard**

Kevin Laidlaw	Director	Columbus, OH
Justin LeBell	Associate	Columbus, OH
Casey Moore	Managing Director, Agency Finance	Columbus, OH

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**Lancaster Pollard Fund Manager**

Craig Jones	President	Fairhope, AL
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**LCB Senior Living, LLC**

Michael A. Stoller	Chief Executive Officer	Norwood, MA
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**Lifespace Communities**

Jesse Jantzen	President & CEO	West Des Moines, IA
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**Longview Senior Housing Advisors, LLC**

Thilo D. Best	Chief Executive Officer	Tampa, FL
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\* Invited Guest

**LTC Properties, Inc.**

Mandi Hogan	VP Marketing and Investor Relations	Nashville, TN
Pam Kessler	Co-President	Westlake Village, CA
Clint Malin	Co-President & CIO	Westlake Village, CA
Wendy Simpson	Chairman & CEO	Westlake Village, CA

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**M&T Realty Capital Corporation**

Steve Muth	Managing Director	Albany, NY
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**MBK Senior Living**

Jeff Fischer	President	Irvine, CA
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**MidCap Financial Services, LLC**

Kevin McMeen	President, Real Estate	Chicago, IL
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**National Health Investors, Inc.**

Michelle R. Kelly	Senior Vice President, Investments	Longmont, CO
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**Nearside Hitch, LLC**

David M. Boitano *	Founder	Tacoma, WA
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**Pathway to Living**

Jerome E. Finis	Chief Executive Officer	Chicago, IL
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**PGIM Real Estate**

Steve Blazejewski	Managing Director	Atlanta, GA
Daniel McKeever	Executive Director, Senior Housing	Madison, NJ

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**ProMatura Group, LLC**

Margaret A. Wylde, Ph.D.	Founder & CEO	Oxford, MS
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**ReNew REIT**

John Getchey *	Chief Investment Officer	Toledo, OH
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**Ridge Care, Inc.**

Marc Maready	Chief Operating Officer	Kernersville, NC
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**RSF Partners**

Kurt Read	Principal	Dallas, TX
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\* Invited Guest



**Ryan Companies US, Inc.**

Julie Ferguson	SVP, Senior Living	Austin, TX
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**Sabra Health Care REIT, Inc.**

Talya Nevo-Hacohen	Chief Investment Officer	Irvine, CA
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**Senior Housing Global Advisors**

Mel Gamzon	Principal	Miami, FL
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**Senior Lifestyle**

Jerrold H. Frumm	Vice Chairman & CIO	Chicago, IL
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**Senior Living Communities, LLC**

Donald O. Thompson, Jr.	Chief Executive Officer	Charlotte, NC
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**Senior Living Investment Brokerage**

Jeff D. Binder	Managing Director	Saint Louis, MO
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**Senior Resource Group, LLC**

Timothy J. Fox	Executive Vice President & CIO	Solana Beach, CA
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Michael S. Grust	President & CEO	Solana Beach, CA
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**Senior Star**

Anja Rogers	Chief Executive Officer	Tulsa, OK
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William F. Thomas	Co-Owner	Tulsa, OK
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Robert D. Thomas	Co-Owner	Tulsa, OK
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**Seniors Capital**

Kathryn Burton Gray *	Principal	Scottsdale, AZ
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**Silverstone Senior Living**

Rosanne McAdam	SVP, Asset Management & Design	Dallas, TX
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Rick Sheppard	Vice Chairman & COO	Bedford, NY
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**Sunrise Senior Living, Inc.**

Nina Cohn	Vice President, Strategic Initiatives	McLean, VA
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Philip Kroskin	SVP of Real Estate	McLean, VA
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Meghan Lublin	SVP, Corporate Marketing & Communications	McLean, VA
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\* Invited Guest

**Synovus**

Sarah S. Duggan Senior Director Birmingham, AL

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**Touchmark**

Marcus P. Breuer \* Chief Executive Officer Beaverton, OR

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**Trilogy Health Services, LLC**

Randall J. Bufford Chairman of the Board Louisville, KY

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**Trustwell Living LLC**

Lawrence A. Cohen \* President & CEO Hewlett, NY

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**Valuation & Information Group**

Jean-Pierre LoMonaco President Culver City, CA

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**Ventas, Inc.**

Justin Hutchens Executive VP, Senior Living, North America Chicago, IL

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**Walker & Dunlop**

Anthony Cassie Managing Director | Investment Sales Portland, OR

Joshua Jandris Managing Director Chicago, IL

Mark L. Myers Managing Director Chicago, IL

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**Watermark Retirement Communities**

Karen Mlawsky Chief Operating Officer Tucson, AZ

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**The Waters Senior Living**

Tami Kozikowski President & COO Minnetonka, MN

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**WELL Companies**

Dave Mazurek Managing Principal Eagle, ID

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**Wells Fargo Multifamily Capital**

Erin P. Peart Senior Vice President Washington, DC

Catherine Voreyer Managing Director Irvine, CA

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**White Oak Healthcare REIT**

Jeff Erhardt \* Managing Director & CIO Mc Lean, VA

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\* Invited Guest

**The Wolff Company**

Danette Opaczewski

Chief Operating Officer

Scottsdale, AZ

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**Ziegler Investment Banking**

Dan Hermann

President &amp; CEO

Chicago, IL

Donald L. Husi

Managing Director

Nashville, TN

Daniel Revie

Managing Director

Milwaukee, WI

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## ASHA MEETINGS SCHEDULE (TENTATIVE)

Date	Meeting	Location	City / State
<b>NOVEMBER 19, 2020</b>	<b>CHAIRMAN'S CIRCLE EVENT</b> ◇ <i>Exclusive Meeting for members who contribute \$2,000—\$5,000 to the Seniors Housing PAC</i>	<b>Virtual</b>	
<b>JANUARY 26, 2021</b>	<b>EXECUTIVE BOARD MEETING</b> ◇ <i>Exclusive Meeting for Executive Board members</i>	<b>Virtual</b>	
<b>SPRING 2021</b>	<b>REGIONAL MEETINGS</b> ◇ <i>ASHA expects to hold several small regional meetings in different cities when it is safe for us to so</i>	<b>TBD</b>	<b>TBD</b>
<b>JUNE 15-17, 2021</b>	<b>MID-YEAR MEETING</b> ◇ <i>Meeting for Executive Board, Advisory Committee and Rising Leaders members</i>	<b>Hyatt Regency Lake Tahoe</b>	<b>Incline Village, NV</b>
<b>OCTOBER 11, 2021</b>	<b>EXECUTIVE BOARD MEETING</b> ◇ <i>Exclusive Meeting for Executive Board members</i>	<b>Sheraton Grand Chicago</b>	<b>Chicago, IL</b>
<b>NOVEMBER 10-11, 2021</b>	<b>CHAIRMAN'S CIRCLE EVENT</b> ◇ <i>Exclusive Meeting for members who contribute \$2,000—\$5,000 to the Seniors Housing PAC</i>	<b>Hotel Bennett</b>	<b>Charleston, SC</b>
<b>JANUARY 24-26, 2022</b>	<b>ANNUAL MEETING</b> ◇ <i>Meeting of the entire membership</i>	<b>Arizona Biltmore Resort</b>	<b>Phoenix, AZ</b>