



**NIC** 2021  
**Conference** FALL

Investing in Seniors Housing & Care Properties

November 1-3 | Houston, TX

# 2021 NIC Fall Conference Program



For our first in-person convening of leaders in senior housing and care since the beginning of the COVID-19 pandemic, NIC's top priority is ensuring attendees' safety to facilitate networking and deal-making.

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# Welcome to the 2021 NIC Fall Conference

## Welcome

For many senior housing and care leaders, the 2021 NIC Fall Conference marks the first opportunity since the beginning of the COVID-19 outbreak to meet face-to-face with peers, prospects, and friends, lending this year's annual meeting a special energy and excitement. Expect to see some adjustments to accommodate safety, and the need to connect with each other, and make sure you plan to get the most out of this return to the year's most important in-person business event.

## Safety

NIC has made safety a priority this year. Numerous innovations, such as the all-day self-service NIC Café, advance mailing of credentials and PPE kits, spreading out the educational program, and onsite health resources, will help reduce crowding and improve your safety. [Learn More](#)

## Networking

NIC has spread meeting points throughout the entire Marriott Marquis Houston, scheduled organized networking events, and provided two spacious designated networking lounges, to enable the kind of face-to-face interactions that all of us have missed so much. The NIC Mobile App has been provided to help you message each other, schedule meetings, find resources, and more. [Learn More](#)

## Insights

Nearly 50 thought leaders and experts will share their insights and perspectives to help you understand the latest trends, digest the latest data, and hear from the nation's most highly regarded experts and leaders on the issues facing senior housing and care today. [Learn More](#)

We can't wait to share this exciting, highly productive, and insightful event with all of you, and to meet with many friends, old and new, in person. See you in Houston!

Warm regards,

## 2021 NIC Fall Conference Program Committee Co-chairs

### Susan Barlow

Co-founder, Managing Partner & COO  
Blue Moon Capital Partners

### Kurt Read

Managing Director  
RSF Partners

# Health & Safety

## On-site Protocols

NIC takes the health and safety of all attendees seriously, which is why every attendee provided proof of vaccination and their photo, and has agreed to comply with the Code of Conduct.

**Attendees are strongly encouraged to:**  
**Wear a Mask unless eating, drinking, or presenting**



## Follow the Code of Conduct including:

- Wash hands frequently with soap and water for 20 seconds or more
- Use hand sanitization stations
- Greet people according to their social distancing preference
- Be considerate, kind, and safe
- Don't attend if ill

## Safe Expo Check-in

Conference attendees must check-in at a Safe Expo Desk, located near the NIC Registration Desk, and on each level of the conference hotel next to the escalators before being granted full admittance into the conference. Look for the staff in front of the purple sign or who are roaming wearing the purple polos with the Safe Expo logo.



A member of the Safe Expo team will scan the QR code on your badge and place a sticker on your badge. You only need to check-in to Safe Expo one time during the duration of the conference.

## EMT & Medical Assistance

Through NIC's partnership with Safe Expo, a licensed EMT is stationed onsite to assist attendees.

## Social Distancing Buttons

Social distancing buttons are located on tables near the concierge desks across the conference space. If you would like, pick up a button that suits your comfort level to indicate how you would like to be greeted by your fellow attendees.





# Schedule At-A-Glance

## Monday, November 1

8:00 AM – 6:30 PM	Registration/Safe Expo Attendee Check-in
1:00 PM – 2:00 PM	First-time Attendee Gathering
2:00 PM – 6:30 PM	Networking Lounges Open
2:00 PM – 5:30 PM	Attendee Services
2:30 PM – 3:30 PM	Main Stage Session
4:30 PM – 5:30 PM	Main Stage Session
5:30 PM – 6:30 PM	NIC Social Hour
6:00 PM – 8:00 PM	Evening Car Service
8:30 PM – 10:30 PM	Evening Dessert Cart

## Tuesday, November 2

6:00 AM – 6:30 PM	Registration/Safe Expo Attendee Check-in
8:00 AM – 6:30 PM	Networking Lounges Open
8:00 AM – 5:30 PM	Attendee Services
8:00 AM – 8:30 AM	First-time Attendee Morning Meet-up
8:30 AM – 9:30 AM	Keynote Main Stage Session
10:30 AM – 11:30 AM	Main Stage Session
12:30 PM – 1:30 PM	Main Stage Session
2:30 PM – 3:30 PM	Main Stage Session
4:30 PM – 5:30 PM	Main Stage Session
5:30 PM – 6:30 PM	NIC Social Hour
6:00 PM – 8:00 PM	Evening Car Service
8:30 PM – 10:30 PM	Evening Dessert Cart

## Wednesday, November 3

6:00 AM – 2:00 PM	Registration/Safe Expo Attendee Check-in
8:00 AM – 3:00 PM	Networking Lounges Open
8:00 AM – 2:30 PM	Attendee Services
8:00 AM – 8:30 AM	First-time Attendee Morning Meet-up
9:00 AM – 10:00 AM	Main Stage Session
11:00 AM – 12:00 PM	Main Stage Session
1:00 PM – 2:00 PM	Main Stage Session



# Educational Program

NIC has designed a program around our nation's most knowledgeable and experienced experts and leaders. Every session is highly relevant, timely, and actionable. Don't miss these opportunities to help you advance your understanding of today's markets and trends, supported with the latest data, as you explore your options and develop strategies both to overcome today's challenges, and forge the solutions of the near future.

## New This Year

The Fall Conference offers ten stand-alone, non concurrent sessions, all conveniently located in the Houston Ballroom on Level 2—designed with comfortable seating and additional aisles to reduce crowding. Remote viewing areas will help reduce crowding, while further improving safe, convenient access to this unique and powerful program.

## Focus Areas

Sessions are organized into two tracks based on the following focus areas:

**Managing Margins** – insights into operational strategies, property operations and management **(MM)**

**Realizing Returns** – insights into capital markets, property investments and capital flow **(RR)**

## Wireless Internet Access

Enjoy complimentary wireless internet throughout the NIC Conference space.



Network: NICFALL21  
Password: CIBC2021



# Educational Program Schedule

## Monday, November 1

### 2:30 PM - 3:30 PM | Main Stage Session

The Investment Market for Active Adult (RR) Pg. 15

### 4:30 PM - 5:30 PM | Main Stage Session

Capital for Operations: Aligning Incentives (MM) Pg. 16

## Tuesday, November 2

### 8:30 AM - 9:30 AM | Keynote Main Stage Session

Macroeconomic and Capital Market Trends: A Conversation with Paul Krugman and Lawrence H. Summers (MM/RR) Pg. 17

### 10:30 AM - 11:30 AM | Main Stage Session

Policy Impact and Outlook:  
A Conversation with Industry Leaders (MM/RR) Pg. 18

### 12:30 PM - 1:30 PM | Main Stage Session

Demand at Your Doorstep: Who is Recovering Faster and Why? (MM) Pg. 18

### 2:30 PM - 3:30 PM | Main Stage Session

The Thesis for Investing in Senior Housing (RR) Pg. 19

### 4:30 PM - 5:30 PM | Main Stage Session

Debt Market Trends and The Pace for Deal Making (RR) Pg. 19

## Wednesday, November 3

### 9:00 AM - 10:00 AM | Main Stage Session

Rethinking Community: Places That Will Attract Future Older Adults (MM) Pg. 20

### 11:00 AM - 12:00 PM | Main Stage Session

Solving for the 'Forgotten' Middle Market (MM) Pg. 21

### 1:00 PM - 2:00 PM | Main Stage Session

Property Valuations for Senior Housing and Skilled Nursing (RR) Pg. 21





# Important Information to Know

## Registration

### Hours:

Sunday, October 31	3:00 PM – 7:00 PM
Monday, November 1	8:00 AM – 6:30 PM
Tuesday, November 2	6:00 AM – 6:30 PM
Wednesday, November 3	6:00 AM – 2:00 PM

## Name Badge & Lanyard Colors

- Seniors Housing Operator & Care Provider
- Healthcare Provider/Risk Bearer/Convener/Insurer
- Developer
- Lender/Debt Provider, Investor/Equity Provider, Financial Intermediary
- Transactional Services, Non-Transactional Services

Attendees are required to wear their name badges throughout the conference. Name badges provide admission to all conference-related activities.

## Badge Rules

Your registration includes one badge for general admission to the 2021 NIC Fall Conference. Only individuals who have registered and present a badge may attend conference events, including all conference sessions, networking lounges, and receptions.

Badge swapping is not permitted. Anyone found wearing a badge that does not match his/her identification will be removed from the conference without a refund. In addition, the registration of any attendee whose badge is being worn by another individual will be forfeited.

The NIC Conference does have security in place to ensure that only registered individuals have access to the conference space.

## Attendee Listing

Located exclusively via the NIC Mobile App, the Attendee Listing includes attendees who registered and chose to be listed. You can export the Attendee Listing to Excel to sort and/or print using the desktop version of the mobile app.

## Meet-up Points

### LEVEL 4:

- 1, 2, 3, 4, 5: Inside of Texas Ballroom Networking Lounge
- 6, 7, 8: Texas Ballroom Foyer/NIC Cafe
- 9: Main Conference Escalator Pre-function Foyer

### LEVEL 3:

- 10: Main Conference Escalator Pre-function Foyer

### LEVEL 2:

- 11, 12: Houston Ballroom Foyer
- 13: Biggio's Networking Lounge Entrance



# On-site Attendee Resources

## On-site Attendee Resource Hours (unless otherwise indicated):

Monday, November 1	2:00 PM – 5:30 PM
Tuesday, November 2	8:00 AM – 5:30 PM
Wednesday, November 3	8:00 AM – 2:30 PM



### Coat & Item Check

Lobby Level

Need a place to stash your coat or briefcase?  
Coat & Item Check can lighten your load.

Monday, November 1	7:30 AM – 7:00 PM
Tuesday, November 2	7:00 AM – 7:00 PM
Wednesday, November 3	7:00 AM – 3:30 PM



### Conference Concierges

Our Conference Concierges are located throughout the conference space and will be delighted to assist you with any needs you might have—from mobile device chargers to hand lotion and much more.



### Evening Car Service

Lobby Level, Crawford Street Exit

Complimentary car service is available from the Marriott Marquis to transport you to your night out in downtown Houston.

Monday, November 1	6:00 PM – 8:00 PM
Tuesday, November 2	6:00 PM – 8:00 PM



### Headshot Lounge

Need to update your professional photo? Put your best face forward and stop by the Headshot Lounge to have your complimentary portrait taken. Use the kiosk provided in the headshot lounge to see and send your photo instantly!



### Individual Private Workspaces

Need a quiet workspace during the conference? Take a break, make a call, check e-mail, or take a few minutes to wind down in one of the provided private workspaces.

### LinkedIn® Corner

Improve Interactions. Build Connections. Increase Engagement. It's time to take a fresh look at your profile on the LinkedIn® platform. Through powerful insights from our LinkedIn concierges, you'll have your understanding of today's LinkedIn platform transformed, discuss profile Do's and Don'ts, and learn how to reposition yourself as an expert and thought leader within the industry. You'll walk away knowing how to:

- Engage your professional network of contacts
- Build connections that are useful and meaningful
- Showcase yourself as a desirable, well-rounded professional
- Share ideas to stand out and be sought out



### Meet-up Points

Meet-Up Points make meeting up easier! Save time locating colleagues by using this resource to identify meeting locations throughout the NIC conference space. Check the back of your badge for meet-up point locations.



## Networking Spaces

Networking spaces are available for use throughout the conference and provide comfortable places for attendees to conduct meetings. Read more about NIC's Networking Opportunities.

**The Texas Ballroom Networking Lounge on Level 4** has ample seating and tables for business meetings and contains the following Attendee Resources: Headshot Lounge, Specialty Coffee Bar, Shoe Shine Area, and LinkedIn® Corner.

**Biggio's Networking Lounge on Level 2** offers a lively setting with floor to ceiling windows and an outdoor balcony.



### Shoe Shine

Polish your look with a complimentary shoe shine.



### Specialty Coffee Bar

Grab a complimentary cup of coffee in between business meetings and sessions.



## NETWORKING LOUNGE ETIQUETTE

The Networking Lounge is designed to facilitate attendee interactions, in an organic, business-friendly environment. Attendees are requested to observe good networking etiquette, while observing the following policies:

- The only company signage or display materials permitted are those posted by NIC
- The space must remain accessible and available at all times to all fellow conference attendees
- Networking Lounges are accessible only by badged conference attendees



# Food & Social Functions

## The NIC Café

New this year is the NIC Café! Enjoy fresh fare during conference hours, on your time, when it's convenient for you! The NIC Café will be a stationary market where you can pick up breakfast, lunch, early evening small plates, snacks, and beverages. Healthy choices, including gluten-free options, will be available. A Glatt Kosher area will also be provided. You will be sure to enjoy this efficient way to stay nourished throughout your busy day.

### Hours:

#### Monday, November 1

2:00 PM – 6:30 PM	All day break items to include fruit, trail mix, and convenience store grabs
2:00 PM – 4:00 PM	Afternoon Break

#### Tuesday, Nov 2

7:30 AM – 6:30 PM	All day break items to include fruit, trail mix, and convenience store grabs
7:30 AM – 9:00 AM	Breakfast
9:30 AM – 11:00 AM	Morning Break
11:30 AM – 1:30 PM	Lunch
2:00 PM – 4:00 PM	Afternoon Break



#### Wednesday, Nov 3

7:30 AM – 3:00 PM	All day break items to include fruit, trail mix, and convenience store grabs
7:30 AM – 9:00 AM	Breakfast
9:30 AM – 11:00 AM	Morning Break
11:30 AM – 1:30 PM	Lunch

## NIC Social Hours

On Monday and Tuesday evening, we are bringing the social hour to you! Continue your conversations in the networking lounges while the fun, food and fare emerge, creating a shift to a more relaxed happy hour-like atmosphere. This new approach for the 2021 NIC Fall Conference aligns with the enhanced conference safety measures and current best practices in food service.

## Glatt Kosher Meals

### Level 4, Texas Ballroom C

Glatt kosher options are available for attendees who requested kosher meals in advance. On Monday, beverages and snacks will be available, and on Tuesday and Wednesday, breakfast, lunch and snacks will be available. Glatt kosher meal times follow the NIC Café schedule.

# First-time Attendees

## New to the NIC Conference? Welcome!

We are so glad you have decided to attend! First-time attendees have access to activities and resources specifically geared to help you successfully navigate the conference, including an orientation webinar, a First-time Attendee Gathering and morning meet-ups. You can indicate you are a first-time attendee by placing this sticker on your badge.

Stickers will be distributed at the First-time Attendee Gathering or you can pick one up at any of the Conference Concierge desks.



### First-time Attendee Gathering

This is your chance to network with fellow first-time attendees, meet NIC Leadership, and hear tips and tools for how to make the most of your conference experience.

#### Location:

Level 6, Outdoor Event Pavilion

#### Hours:

Monday, November 1 1:00 PM – 2:00 PM

### First-time Attendee Morning Meet-ups

Meet up with other first-time attendees and conference veterans to jump start your day.

#### Location:

Level 4, Texas Ballroom Foyer

#### Hours:

Tuesday, November 2 8:00 AM – 8:30 AM  
Wednesday, November 3 8:00 AM – 8:30 AM



## NICMAP VISION

### THE MOST TRUSTED DATA FOR SENIORS HOUSING AND CARE

NIC MAP Vision is a leading provider of comprehensive market data and analytics for the seniors housing and care sector.

**1B+**  
Demand & Demographic  
Data Points

Rate & Occupancy Data for  
**140 Markets**

**15+**  
Years of Historical  
Market Performance Data

**35K+** Properties Nationwide  
with Inventory Data

### DATA WE PROVIDE

**EXISTING  
STOCK**

**PROPERTY  
CHARACTERISTICS**

**HOSPITAL  
LOCATIONS**

**SALES  
TRANSACTIONS**

**CONSTRUCTION  
PIPELINE**

**OCCUPANCY &  
RATE COMPS**

**DEMOGRAPHICS**

### THERE'S NO SUBSTITUTE FOR A GOOD CONVERSATION



Stop by the NIC MAP Vision meeting room or schedule a meeting in advance: [info.nicmapvision.com/nic-fall-conference](https://info.nicmapvision.com/nic-fall-conference).

Our hours are:

Monday  
November 1, 2021  
2:00 PM – 5:30 PM

Tuesday  
November 2, 2021  
8:00 AM – 5:30 PM

Thursday  
November 3, 2021  
8:00 AM – 2:30 PM

Location: David Mitzner Room, Level 4

# NIC MAP Vision: Talk to a Product Expert

NIC MAP Vision is a leading provider of comprehensive market data and analytics for the seniors housing and care sector. Operators, lenders, developers, and owners use the NIC MAP Vision product for unparalleled insight into local market dynamics nationwide.

Join product experts to learn how NIC MAP Vision's powerful web-based tools, trusted by 5,000+ customers and focused exclusively on seniors housing and care informs business decisions with the following critical data sets:

- Construction Pipeline
- Demographics
- Disability Rates
- Employment & Wage Benchmarks
- Market Fundamentals including Occupancy, Asking Rates, & Inventory levels
- Medicare Beneficiaries
- Population Growth Rates
- Psychographic & Demographic Profiles
- Quality Metrics
- Sales Transaction Activity & More

Schedule a meeting in advance by visiting [info.nicmapvision.com/nic-fall-conference](https://info.nicmapvision.com/nic-fall-conference) or by stopping the David Mitzner Room during the following times:

**Location:**

Level 4, David Mitzner Room

**Hours:**

Monday, November 1	2:00 PM - 5:30 PM
Tuesday, November 2	8:00 AM - 5:30 PM
Wednesday, November 3	8:00 AM - 2:30 PM



## Coffee?

Grab a cup from the Specialty Coffee Bar located on Level 4 in The Texas Ballroom Networking Lounge

# General Information

## Business Center

### Level 2

A FedEx managed business center is available for use during the following times:

Sunday, October 31	12:00 PM – 4:00 PM
Monday, November 1	7:00 AM – 6:00 PM
Tuesday, November 2	7:00 AM – 6:00 PM
Wednesday, November 3	7:00 AM – 6:00 PM

## Lost and Found

Any lost items may be available to claim at NIC Registration. NIC will secure items until the end of each day and then turn them over to the Marriott Marquis Houston security.

## Minyan

### Level 2, Harris Room

A space is available for use to observe Minyan during the following times:

Monday, November 1	6:00 PM – 8:00 PM
Tuesday, November 2	6:00 AM – 8:00 AM & 6:00 PM – 8:00 PM
Wednesday, November 3	6:00 AM – 8:00 AM

## Photos and Videos

NIC reserves the right to use photographs/video taken of attendees at the conference for its purposes. Attendees waive any right to inspect or approve finished photographs/video or copy used for promotional purposes.

## Speaker Presentations

Attendees can view available session presentations via the NIC Mobile App. From the Home screen, click on “More”, then Information and Educational Programming Schedule. Search the session title. Attendees can access video recordings of the presentations shortly after the conference.

## Be Social

Join the social buzz & share your conference experience using

**#NICFALL21.**

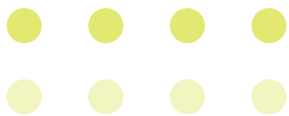


ntl\_invctr



@Nat\_Inv\_Ctr





# Daily Session Schedule

## Monday, November 1

**2:30 PM – 3:30 PM**    **Main Stage Session**

**4:30 PM – 5:30 PM**    **Main Stage Session**

All sessions take place on Level 2 in the Houston Ballroom.

If you prefer to enjoy the sessions in a less crowded environment or outside, visit the Live Streaming living room in the Houston Ballroom Foyer or our outdoor viewing area on Level 6 in the Event Pavilion.

### **2:30 PM – 3:30 PM | Main Stage**

#### **The Investment Market for Active Adult (RR)**

Active adult communities are gaining increased interest among investors and developers as an opportunity to serve the aging baby boomer generation. An interactive panel discussion with industry experts will address key questions, such as: how is 'Active Adult' being defined; what is driving investor interest; what are pricing, deal structures and debt terms; who is building and where; how is this property type different from independent living and other traditional private-pay products; could Active Adult be the initial part of the care continuum for seniors and act as a feeder product; does Active Adult compete with or complement senior housing; and more. And of course, the elephant in the room—what happens to Active Adult properties as residents age in place—will be discussed as well.

#### **Moderator:**

**Aron Will**, Vice Chairman, Debt & Structured Finance | Co-Head Senior Housing, CBRE

#### **Speakers:**

**Zachary Crowe**, Principal, The Carlyle Group

**Ayesha Menon**, SVP, Wellness Housing & Development, Welltower

**Jeff Patterson**, Co-founder & CEO, Sparrow Partners



### **Need Assistance?**

Our Conference Concierges are located throughout the conference space and will be delighted to assist you with any needs you might have—from mobile device chargers to photocopies and much more.



#### 4:30 PM – 5:30 PM | Main Stage

##### Capital for Operations: Aligning Incentives (MM)

How does an investor derive the valuation of an operator—that of a cash-flow business? How can operators incentivize capital investors/partners to invest in operations, and what fee and/or incentive structures are available? Seasoned industry veterans will discuss the importance of aligning incentives to manage increased costs, fund growth, and improve operating efficiencies, as well as the value of building relationships with quality operations teams.

##### Moderator:

**Torey Riso**, Managing Director/Leader Healthcare Real Estate, Huron Consulting Group

##### Speakers:

**Brian Beckwith**, CEO, Arcus Healthcare Partners, LLC

**Mercedes Kerr**, President, Belmont Village Senior Living

**Fee Stubblefield**, CEO & Founder, The Springs Living

**Chris Taylor**, Managing Director, Capital One Healthcare





# Daily Session Schedule

## Tuesday, November 2

8:30 AM – 9:30 AM	Keynote Main Stage Session
10:30 AM – 11:30 AM	Main Stage Session
12:30 PM – 1:30 PM	Main Stage Session
2:30 PM – 3:30 PM	Main Stage Session
4:30 PM – 5:30 PM	Main Stage Session

All sessions take place on Level 2 in the Houston Ballroom.

If you prefer to enjoy the sessions in a less crowded environment or outside, visit the Live Streaming living room in the Houston Ballroom Foyer or our outdoor viewing area on Level 6 in the Event Pavilion.

### 8:30 AM – 9:30 AM | Keynote Main Stage Session

#### Macroeconomic and Capital Market Trends: A Conversation with Paul Krugman and Lawrence H. Summers ([RR/MM](#))

Nationally prominent economists Lawrence H. Summers, former Secretary of the U.S. Treasury, and Paul Krugman, economist and New York Times columnist, will discuss the outlook for the economy and the capital markets. The spectrum of topics includes the potential for rising inflation, the direction with interest rates, cost of capital, the direction of fiscal and monetary policy, rising deficits, and labor markets. The discussion will be moderated by Angela Mago, President, Commercial Bank & Real Estate Capital, KeyBank

#### Moderator:

Angela Mago, President, Commercial Bank and Real Estate Capital, KeyBank

#### Keynote Speakers:

Paul Krugman, Economist and Columnist, New York Times

Lawrence H. Summers, Former Secretary of the U.S. Treasury



## 10:30 AM – 11:30 AM | Main Stage Session

### Policy Impact and Outlook: A Conversation with Industry Leaders (RR/MM)

Industry association executives will share their insights into the key policy and funding proposals and the potential impacts for senior housing and skilled nursing providers. Does funding for integrated care and services result in new regulations? The Administration has pledged \$400B towards home health. Will skilled nursing receive the critical funding needed for advancing integrated care and services for America's seniors?

#### Moderator:

**Brian Jurutka**, President & CEO, NIC

#### Speakers:

**James Balda**, President & CEO, Argentum

**Mark Parkinson**, President & CEO, AHCA/NCAL

**David Schless**, President, ASHA

## 12:30 PM – 1:30 PM | Main Stage Session

### Demand at Your Doorstep: Who is Recovering Faster and Why? (MM)

As the sector experiences anticipated occupancy growth, an expert panel will take a deep dive into the market-by-market nuances to explain who is recovering. What factors, macro and regional, are influencing market trends that correlate to faster recovery? How is this recovery expected to compare to those of previous cycles?

#### Co-Moderators:

**Bre Grubbs**, EVP, Revenue Strategies, Leisure Care

**Justin Hutchens**, EVP, Senior Housing, Ventas, Inc.

#### Speakers:

**Chris Bird**, EVP/COO, Life Care Services

**Lana Peck**, Senior Principal, NIC

**Nicole Sermier**, Executive Managing Director and Head of Residential Investments, Sculptor Real Estate



## 2:30 PM – 3:30 PM | Main Stage Session

### The Thesis for Investing in Senior Housing (RR)

Join this forward-looking discussion as investors and industry experts use the latest market data and analyses to highlight the opportunities and challenges of investing in senior housing and the key investment considerations. Topics for discussion will include the short- and long-term impacts of the pandemic across commercial real estate property types, demographic factors, construction trends, underwriting assumptions, absorption, obsolescence, and other factors impacting investment decisions.

#### Moderator:

**Beth Mace**, Chief Economist, NIC

#### Speakers:

**John A. Moore**, Chairman of the Board & CEO, Atria Senior Living

**Steven Schmidt**, National Director, Senior Housing Lending, Freddie Mac

**Brian Sunday**, Senior Managing Director, AEW

## 4:30 PM – 5:30 PM | Main Stage Session

### Debt Market Trends and The Pace for Deal Making (RR)

As the senior housing and skilled nursing debt markets continue to evolve, lenders are demonstrating their commitment to the sector through transparency and flexibility. Hear leading debt capital providers discuss expectations for inflation and interest rates, the pace of deal making in today's market, how to look at performance, and the increased demand for bridge products.

#### Moderator:

**Aaron Becker**, Senior Managing Director, Lument

#### Speakers:

**Lee Delaveris**, Vice President, KeyBank Real Estate Capital

**Imran Javaid**, Managing Director, BMO Harris Bank

**Kelly Sheehy**, Principal & Managing Director – Healthcare, Artemis Real Estate Partners



# Daily Session Schedule

## Wednesday, November 3

9:00 AM – 10:00 AM    **Main Stage Session**  
11:00 AM – 12:00 PM    **Main Stage Session**  
1:00 PM – 2:00 PM    **Main Stage Session**

All sessions take place on Level 2 in the Houston Ballroom.

If you prefer to enjoy the sessions in a less crowded environment or outside, visit the Live Streaming living room in the Houston Ballroom Foyer or our outdoor viewing area on Level 6 in the Event Pavilion.

### 9:00 AM – 10:00 AM | Main Stage Session

#### Rethinking Community: Places That Will Attract Future Older Adults (MM)

What are older adults seeking for their future housing needs? A certain type of housing or amenities? Or is it more about a sense of place—community and lifestyle? Industry thought leaders and experts in the fields of aging and longevity will discuss the lifestyle values and preferences of adults in their 60s and 70s—innovative approaches to meet their needs and new ways of thinking about housing models and choices. Join this interactive discussion as they examine practicality, scalability, and ‘invest-ability’ of future housing for older adults.

#### Moderator:

**Susan Barlow**, Co-Founder, Managing Partner & Chief Operating Officer, Blue Moon Capital Partners

#### Speakers:

**Ryan Frederick**, Founder & CEO, SmartLiving 360

**Robert Kramer**, Co-Founder & Strategic Advisor, NIC, Founder & Fellow, Nexus Insights

**Jake Rothstein**, Founder & CEO, UpsideHöM

**Sara Zeff Geber**, Ph.D., Founder, LifeEncore



## 11:00 AM – 12:00 PM | Main Stage Session

### Solving for the 'Forgotten' Middle Market (MM)

Neither able to afford current private-pay senior living options, nor qualify for Medicaid, millions of Americans, many of whom would be able to afford care and housing at a lower price-point, will be left without options unless new models arise. Following a presentation of the data on the 'forgotten middle,' innovators in the space will discuss how they are developing solutions, including delivering care at reduced cost, renovating or repurposing existing buildings, achieving economies of scale, and more. Hear details on the latest ideas and innovations for a product expected to experience high demand in coming years.

#### Moderator:

**Joseph P. Kiernan**, Chief Strategy Officer/SVP, Network Development, Ocean Healthcare

#### Speakers:

**Ryan Brooks**, Senior Principal, NIC

**Pilar Carvajal**, Founder & CEO, Innovation Senior Living

**Tana Gall**, President, Merrill Gardens and Truewood by Merrill

## 1:00 PM – 2:00 PM | Main Stage Session

### Property Valuations for Senior Housing and Skilled Nursing (RR)

An enduring favorite and staple topic at NIC conferences, this interactive session will feature expert analysis and perspectives from seasoned valuations experts representing a public REIT, operating companies and brokers. Hear the latest trends, emerging factors for consideration, the impact of the pandemic on value, views on operational management, and short and long-term outlook for valuations.

#### Co-Moderators:

**Zach Bowyer**, Managing Director, JLL

**Ben Firestone**, Executive Managing Director & Co-Founder, Blueprint

#### Speakers:

**Nikhil Chaudhri**, SVP, Co-Head of U.S. Investments, Welltower

**Jason Dopoulos**, Managing Principal, White Oak Healthcare Partners

**Stephen M. Monroe**, Managing Director, Levin Associates

**Blake Peeper**, Partner, Co-Chief Investment Officer, Bridge Investment Group

**Bryan Schachter**, Chief Investment Officer, Watermark Retirement Communities

# Did You Know

The National Investment Center for Seniors Housing & Care (NIC), is a 501(c)(3) organization, working to enable access and choice for older adults by providing data, analytics, and connections that bring together investors and providers.

NIC promotes transparency, which improves the flow of capital.

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### Upcoming NIC Events

- 2022 NIC Spring Conference - March 23-25 - Dallas, TX
- NIC Skilled Nursing Boot Camps – Spring 2022
- Leadership Huddle Webinars – Spring & Fall 2022
- NIC Senior Housing Boot Camps – Summer 2022
- 2022 NIC Fall Conference – September 14-16 – Washington, DC

### NIC Research and Analytics

- Executive Survey Insights
- Insights from NIC MAP® data, powered by NIC MAP Vision
- Skilled Nursing COVID-19 Tracker
- COVID-19 Impact Study (NORC at the University of Chicago)
- Lending Trends Report
- The Forgotten Middle: Middle Market Senior Housing Study

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Schedule At-A-Glance



Tip of the Week



Evening Amenity – Tuesday



Tip of the Week



Fall Conference Overview Video



Welcome Signage



Mirror Clings and Amenity Trays



Headshot Lounge



Know Before You Go Email



Tip of the Week



Evening Dessert Cart – Monday



NIC Café



Conference Wi-Fi



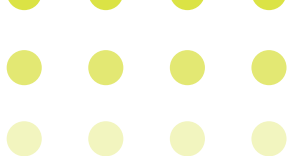
Hydration Station – Guest Rooms



Electronic Final Program



Live Streaming Areas



Event Website



Kosher Accommodations



Evening Dessert Cart – Tuesday Evening

GREYSTONE

Escalator Clings



Hydration Station – Conference Space



Turndown Service



Morning Newspaper Delivery



Interactive Touch Screen Displays



Specialty Coffee Bar



Shoe Shine



Networking Lounge – Texas Ballroom



Escalator Clings



Networking Lounge – Biggio's



Evening Amenity – Monday



Conference Concierge



First-time Attendee Meet-up Area



Touchless Tool



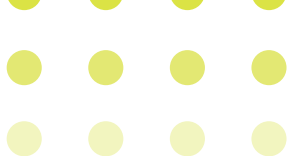
PPE Kits



First-time Attendee Orientation  
Webinar & Gathering



Badges and Lanyards



LinkedIn® Corner



Meet-up Points



Mobile Charging Banks and Cords



Education Break Station



Tip of the Week



Tip of the Week



Kosher Accommodations



NIC Café



Schedule At-A-Glance



Electronic Attendee Listing



Daily Recap Email



NIC Café



NIC Chats Podcast On the Road



Electronic Preliminary Program



Welcome Area Gesture



NIC Mobile App



Evening Car Service



Elevator Clings



NIC Chats Podcast On the Road



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## 2021 Fall Planning Committee

**Susan Barlow, Co-Chair**, Co-founder & Managing Partner, Blue Moon Capital Partners

**Aaron Becker**, Senior Managing Director, Lument

**Zachary Bowyer**, Managing Director, JLL Valuation Advisory

**Randall Bufford**, Founder & Chairman, Trilogy Health Services, LLC

**Pilar Carvajal**, Founder & CEO, Innovation Senior Living

**Lori Coombs**, Managing Director, Wells Fargo Multi-Family Capital

**Ben Firestone**, Executive Managing Director & Co-founder, Blueprint Healthcare Real Estate Advisors

**Bre Grubbs**, SVP, Revenue Strategies, Leisure Care

**Justin Hutchens**, EVP, Senior Housing, Ventas, Inc.

**Cindy Kent**, Former Executive Vice President & President, Senior Living, Brookdale Senior Living

**Mercedes Kerr**, President, Belmont Village Senior Living

**Joseph Kiernan**, Chief Strategy Officer/Senior Vice President, Network Development, Ocean Healthcare

**Kurt Read, Co-Chair**, Managing Director, RSF Partners

**Matthew Ruark**, SVP & Head of Commercial & Healthcare Production, KeyBank Real Estate Capital Market Group

**Steven Schmidt**, National Director, Seniors Housing Group, Freddie Mac

**Brian Sunday**, Senior Managing Director, AEW Capital Management



# Save the Dates

**Join us next time**

2022 NIC Spring Conference	March 23 - 25   Dallas, TX
NIC Skilled Nursing Boot Camps	Spring 2022
Leadership Huddle Webinars	Spring & Fall 2022
NIC Senior Housing Boot Camps	Summer 2022
2022 NIC Fall Conference	September 14 - 16   Washington, DC





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