

March 2023 | New Orleans, LA

CLRM

Construction Lender Risk Management Roundtable

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Partner Engineering and Science, Inc. (Partner) is a national firm offering full-service engineering, environmental and energy consulting and design services. Our multidisciplinary approach allows us to serve clients at all stages from initial due diligence and design to development and construction, as well as the ongoing maintenance and optimization of a real estate asset.

PREMIER



SureBuild offers the extra protection a lender needs to have confidence in their construction lending practices. It is an easy, proactive solution that avoids the hassles and delays of bonds in the event of borrower default, while offering policy limits of up to 100% of the construction contract amount.

GOLD



Eclectus, Inc. (dba ECL Software) develops award-winning risk mitigation solutions for all aspects of the Construction Industry. Founded in 1992 and incorporated in 1994, ECL has continued to provide solutions with a “Just Do It Once” approach. Having won awards for its Contracting and Banking solutions, ECL has developed a reputation for quality, flexibility, and ease of use.

SILVER



ERIS is a leading provider of critical environmental risk data, government records and historical property information. ERIS rapidly delivers accurate, affordable, comprehensive, and on-demand database research. Database Reports meet criteria set by ASTM. Our expertise, innovation, and service-first attitude have made us the fastest growing company in the environmental data industry. Innovative products, using leading edge technology, including ERIS Xplorer, ERIS Mobile, and ERIS Direct are solutions to fulfill your environmental due diligence and risk assessment needs.



Mitigate Construction Lending Risk with SureBuildSM Project Completion Insurance.

SureBuildSM offers the extra protection a lender needs to have confidence in their construction lending practices. It is an easy, proactive solution that avoids the hassles and delays of bonds in the event of borrower default, while offering policy limits of up to 100% of the construction contract amount.

SureBuildSM offers lenders more than a surety bond for less.

Welcome

Welcome to the 10th annual Construction Lender Risk Management Roundtable! Over the last decade the CLRM community has continually expanded in person via our national and regional meetings; online via recurring webinars and a LinkedIn forum; and in print via the CLRM Journal. The growth and loyalty in this community over the last several years has been incredible, with an 80% retention in our CLRM members.

The 2023 national meeting will cover diverse topics such as Construction Lending, Construction Management, Renewable Energy, and an economic update. Thank you for being an integral part of the mission of this group and, if this is your first time attending, we look forward to your participation. Let the sessions commence!

Get Connected

There are several ways to get involved in the CLRM community and stay connected throughout the year.

- Regional Meetings & Calls

Regional meetings and monthly calls provide a way to join discussions even if you can't make the trip for the annual meeting. Meetings that take place across the country make it possible to get to know peers and share your latest concerns. Calls cover topics like stored materials and costs as well as development of white papers and guidance.

- LinkedIn

Join us on LinkedIn. Search Construction Lender Risk Management Group and request to join or visit www.linkedin.com/groups/6635200

- Become a Member

To become a member, you simply participate! Contact us to find out more about the schedule for monthly calls and regional forums (held across the U.S.) that you can take part in.

Additionally, please let us know if you are interested in submitting a topic for a call or event, would like to be notified of an event, or are interested in hosting a regional CLRM in your city.

Contact us at CLRMinfo@partneresi.com. You can also visit us at www.construction-lender-risk-management.org.





Hotel Monteleone





TUESDAY
MARCH 28

TUESDAY SCHEDULE

ALL SESSIONS ARE LOCATED IN THE HOTEL MONTELEONE UNLESS OTHERWISE NOTED.

7:00 AM – 8:00 AM	Breakfast	ROYAL ROOM	GROUND LEVEL
8:15 AM – 8:30 AM	Welcome and Introductions	QUEEN ANNE BALLROOM	SECOND LEVEL
8:30 AM – 9:30 AM	Economic Update An overview of economic expectations for 2023 and 2024, along with his perspective on the impact of interest rates, investments, and portfolio performance. [Speaker: John Norris , Managing Director, Investments and Thought Leadership, Oakworth Capital Bank]		
9:30 AM - 10:15 AM	Building a Stronger New Orleans Natural disasters in New Orleans have made investment challenging, but the community has taken steps to reduce the impacts of future events. A team of local developers will discuss changes underway that will reduce the likelihood of significant impacts on properties and neighborhoods. [Panelists: Jacquelyn Dadakis , President and CEO, Green Coast Enterprises and Angela O’Byrne , President, Perez, APC]		
10:15 AM - 10:30 AM	Networking Break	BALLROOM FOYER	SECOND LEVEL
10:30 AM - 11:30 AM	Market Overview Industry leaders will provide an overview of what they’re seeing in the market; transaction volume, loan performance, common problems, and more. [Panelists: Bill Tryon , Chief Strategy Officer – Principal, Partner ESI (Moderator); Casey Hutchins , Head of Construction, Live Oak Bank; Steve Oehlrich , Construction Manager, Citi; Larry Dalton , Senior Vice President, Western Alliance Bank Franchise Hotel; Morris McDaniel , Senior Vice President, Wells Fargo; Jeremy Glassman , Managing Director, Lument; Justin Preftakes , Managing Director, Barings; and Sanat Patel , Chief Lending Officer, AVANA Companies]	QUEEN ANNE BALLROOM	SECOND LEVEL
11:30 AM - 12:00 PM	Risk and Vulnerability: Managing Loss from Natural Disasters The magnitude and frequency of natural disasters is on the rise and traditional insurance products are becoming increasingly expensive. This panel will lay the groundwork for discussions during break-out sessions to explore policy development to minimize related risks. [Panelists: Bill Tryon , Chief Strategy Officer – Principal, Partner ESI (Moderator); Brady Mills , Senior Technical Manager, Partner Energy; and Kevin McElroy , Sr Lead Construction Consultant, VP, REVS Construction, Wells Fargo]		
12:00 PM - 1:30 PM	Lunch Presentation: Market Impacts of Increasing Interest Rates [Speaker: Eric Enloe , Senior Managing Director, Partner Valuation Advisors]	ROYAL ROOM	GROUND LEVEL
1:30 PM - 2:30 PM	Is This the New Normal? Supply chain disruptions and wild cost fluctuations have impacted the way we all do business. This panel will share ideas and approaches to evaluate and minimize the resulting risks. [Panelists: Bill Tryon , Chief Strategy Officer – Principal, Partner ESI (Moderator); Robert Barone , Director of Construction Services, Partner ESI; Harry Baulch , Construction Manager, VP, Truist; Stephen Barcus , Senior Construction Services Manager, Capital Impact Partners; Shelley Souza , Director, SBL Construction Manager, The Bancorp; and Ryan Duff , Vice President, FHA Construction, Berkadia]	QUEEN ANNE BALLROOM	SECOND LEVEL
2:30 PM - 3:00 PM	Breakout Session 1		
3:00 PM - 3:15 PM	Networking Break	BALLROOM FOYER	SECOND LEVEL
3:15 PM - 3:45 PM	Breakout Session 2	QUEEN ANNE BALLROOM	SECOND LEVEL
3:45 PM - 4:45 PM	Now What: Recognizing and Fixing Broken Projects Project delays and increasing costs have made it difficult for many construction projects to succeed. This panel will review case studies to discuss warning signs of failure as well as actions that can help bring projects back on track. [Speaker: Bill Tryon , Chief Strategy Officer – Principal, Partner ESI (Moderator); James Robertson , Managing Partner, Lincoln Capital Management; Sanat Patel , Chief Lending Officer, AVANA Companies; Trey Meers , Senior Vice President – Real Estate Services, Wintrust Financial Corporation; Dave Wald , President, Wald Realty Advisors; and Alfredo Zullo , Construction Risk Management, Capital One]	QUEEN ANNE BALLROOM	SECOND LEVEL
4:45 PM	Sessions Conclude		
5:30 PM - 7:30 PM	NOLA's French Quarter / Haunted History Tour	OFFSITE	
7:30 PM - 9:30 PM	Antoine’s Restaurant for Dinner and Drinks	OFFSITE	
10:00 PM	Preservation Hall for Live Jazz and Drinks	OFFSITE	



WEDNESDAY

MARCH 29

WEDNESDAY SCHEDULE

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7:30 AM – 8:00 AM	Breakfast	ROYAL ROOM	GROUND LEVEL
8:30 AM – 8:30 AM	Welcome and Introductions	QUEEN ANNE BALLROOM	SECOND LEVEL
8:30 AM – 9:30 AM	Regulatory Update An overview of OCC's findings and concerns as a result of economic challenges and recent examination results [Speaker: Joseph Hoge , Office of the Comptroller of the Currency (OCC), Commercial Credit Lead Expert, Community Bank Supervision]		
9:30 AM - 10:15 AM	Remote Work - Is it Working? [Panelists: Kelly Javier , MBA, Marketing Director – Principal, Partner ESI; Stacy Thomson , Director – Engineering, Barings; and Trey Meers , Senior Vice President – Real Estate Services, Wintrust Financial Corporation]		
10:15 AM - 10:30 AM	Networking Break	BALLROOM FOYER	SECOND LEVEL
10:30 AM - 11:15 AM	Breakout Summaries Leaders of breakout discussions will provide a summary of recommendations and next steps for key topics.	QUEEN ANNE BALLROOM	SECOND LEVEL
11:15 AM - 12:15 PM	Managing Uncertainty to Get Deals Done This panel of industry veterans will discuss approaches to reduce risks to support financing for sound projects in uncertain times. [Panelists: Bill Tryon , Chief Strategy Officer – Principal, Partner ESI (Moderator); Larry Dalton , Senior Vice President, Western Alliance Bank Franchise Hotel; Frank He , Managing Director, Partner, Parkview Financial; and Justin Preftakes , Managing Director, Barings]		
12:30 PM	Roundtable Concludes, Boxed Lunches	ROYAL ROOM	GROUND LEVEL
2:30 PM	NOLA Mixology & Airboat	OFFSITE	

BREAKOUT SESSIONS

Offsite Stored Materials	Don Ohle , Director of Engineering, Barings	Process Improvement: Preparing for the Next Sprint	Ryan Duff , Vice President, Construction, Berkadia
Stored Materials and Deposits	Brooke Bright , Assistant Director of Construction Risk Management, U.S. Bank CDC	Supply Chain Delays and Project Impacts	Rene Coronado , Assistant Vice President, FHA Construction, Berkadia
GC Risk Management from Underwriting Through Project Closeout	Alex Jurgenson , AVP, Western Alliance Bank	SBA/Credit Union Focus Group	Patrick Rabalais , SVP, Lincoln Capital Joey Bonin , Principal, Partner ESI
Developing Skill Sets in New Hires	Robert Biggs , Senior Vice President, Wells Fargo Bank	Insurance	Jeff Dodt , Construction Administration Manager, Truist Bank
Developing Info to Take Over Troubled Projects	Justin Preftakes , Managing Director, Barings Robert Barone , Director of Construction Services, Partner ESI	Policy Development Roundtable: Property Resilience Assessment and ESG	Bill Tryon , Chief Strategy Officer, Partner ESI
Tax Credit Financing and Investment	Drew McCreery , Managing Director, Partner ESI	Changing Face of Real Estate Due to Remote Work	Kelly Javier , Marketing Director, Partner ESI



NASHVILLE, TN

MARCH 2024

CLRM SPEAKERS

MARCH 2023

TUESDAY SPEAKERS



Bill Tryon

Partner Engineering and Science, Inc.
Chief Strategy Officer- Principal

With over 30 years in the industry, Bill Tryon has developed risk management policies and procedures for one of the world's top real estate lenders and has participated with government agencies to refine policies and requirements. He has developed a reputation for risk-based problem solving and excellence. As Chief of Construction and Environmental Services for a major real estate lender, he pioneered standards for the evaluation of environmental liabilities, property conditions, seismic and mold assessment activities. Many of his innovations and refinements have become common practice in the industry. He continues to influence due diligence practices as a member of the Environmental Banker's Association, Co-Chair of the ASTM committee developing standards governing Property Condition Assessment, participation in additional ASTM committees, and Executive Director of the Construction Lender's Risk Management Roundtable. As Partner's Chief Strategy Officer, Mr. Tryon monitors industry trends and works with clients and the industry to develop policies and practices in response to emerging issues.



John Norris

Oakworth Capital Bank
Managing Director, Investments and Thought Leadership

Mr. Norris oversees Investments and Thought Leadership for Oakworth Capital Bank. Prior to helping start Oakworth, Mr. Norris was also Chief Economist, Chairman of the Investment Strategy Committee, and a Senior Fund Manager for Regions Financial Corporation's Morgan Asset Management (MAM) subsidiary. Before joining Regions, he served as the Chief Investment Officer for The Trust Company of Sterne, Agee & Leach, Inc. and started his professional career with Mercantile-Safe Deposit & Trust Company in Baltimore, Maryland, as an Institutional Fixed Income Portfolio Manager. In addition to his role at Oakworth Capital Bank, Mr. Norris hosts a podcast, writes a weekly blog, was a guest columnist to the Montgomery Advertiser's business section for over a decade, and speaks publicly to a wide variety of audiences. He frequently speaks to students on the high school and college level, large organizations, professionals and retirees. He received his Bachelor of Arts in 1990 from Wake Forest University and his Master of Business Administration in 1994 from the University of Baltimore.



Jacquelyn Dadakis

Green Coast Enterprises
President and CEO

Jacquelyn Dadakis (Jackie), is the Chief Executive Officer of Green Coast Enterprises, and has been recognized as one of The Gambit's 40 under 40, New Orleans Magazine People to Watch and New Orleans City Business Women of the Year. Since its founding in 2007, Green Coast Enterprises has helped develop over \$200 million of properties in New Orleans. Emphasizing small businesses and local food and beverage operators, Green Coast brings together communities within our properties that thrive through collaboration. She joined Green Coast in 2013 to launch GCE Services, a consulting firm that provides services to property owners, municipalities, and utilities seeking to be more energy efficient. In 2017 she moved into the role of Chief Operating Officer for Green Coast Enterprises taking responsibility for the operating entities including the successful launch of the Pythian Market in 2018.

TUESDAY SPEAKERS



Angela O'Byrne

Perez, APC
President

Angela O'Byrne serves as current President of Perez, APC. Perez designs, builds, & develops resilient communities where people thrive. She has served as Principal in Charge and Project Manager for a variety of project types including affordable housing, K-12 public schools & higher education, office buildings, corporate interiors, information technology centers, banks and trading floors, healthcare, hospitality, and historic preservation. Ms. O'Byrne is extremely resourceful, and especially adept at identifying and addressing real issues in the design and construction process. Ms. O'Byrne is board certified with the National Council of Architectural Registration Boards (NCARB) and is a registered Architect in 12 states. She is the past president of the American Institute of Architects (AIA) New Orleans chapter, and is co-founder of CityWorks, a non-profit dedicated to rebuilding New Orleans, post Katrina. Ms. O'Byrne is current Chapter President of Commercial Real Estate Women (CREW), and is on the Board Directors for the national CREW Network.



Casey Hutchins

Live Oak Bank
Head of Construction

Casey joined Live Oak Bank in 2015 as a lender in the bank's small loan department before transitioning to the hotel lending team to serve as an underwriter and subsequently a loan officer. In January 2020, Casey joined the construction team as the Policy and Procedure Manager. In this role, she assessed the team's policies, processes, and oversaw the implementation of BUILT, the Construction department's new disbursement software. She then transitioned into her current role as Head of Construction, where she oversees the entire construction loan team. Casey is a graduate of the University of North Carolina Wilmington and recently received her MBA.



Steve Oehlrich

Citi
Construction Manager

Steven Oehlrich is the Head of the Construction Management Team at Citi Community Capital where they assess and manage real estate risks for the affordable housing portfolio. The group specializes in the acquisition of properties and administration of construction loans for both rehab and new construction projects throughout the country. Mr. Oehlrich has also worked at Hypo Real Estate Bank and JP Morgan Chase, which equates to 20 years in the Construction Lending Industry with wide range of experience in dealing with affordable/market rate multi-family, market rate condos, commercial, office, warehouse, hotels, and troubled assets. Also, spent time as a project manager for a large Commercial REIT and a nationwide consulting services firm that results in a well-rounded and diverse perspective within the construction industry. Mr. Oehlrich has a Bachelor of Science in Civil Engineering from the University of Rhode Island.

TUESDAY SPEAKERS



Larry Dalton

Western Alliance Bank Franchise Hotel
Senior Vice President

40 Years Commercial Real Estate (29 Years Franchise Hospitality Specialist). Specialties: Premium Branded Franchise Hotel Construction Lending & Development, Site Selection, Entitlement, Valuation, Joint Ventures, Consulting, Financial Analysis, Due Diligence, New Loan Origination & Underwriting (Construction, Renovations, Conversions, Acquisitions, Refinance), Portfolio Management and Workout. Conventional, SBA 504 & 7(a).



Morris McDaniel

Wells Fargo
Senior Vice President

Accomplished Commercial Lending Portfolio and Risk Leader with demonstrated achievement in meeting production, profitability and credit portfolio management goals. Expertise in Small Business Administration (SBA) Lending, Commercial Construction Lending, Commercial & Industrial (C&I), Real Estate and Business Finance. Experienced developer of strategic initiatives with measurable results that consistently exceed expectations. Advanced talent evaluation skills, team building skills, and creation of a work environment that has resulted in high employee retention levels. Leadership skills that assist in collaborating with divisions across the bank to achieve shared goals. Corporate governance expertise with public and non-profit boards and public speaking experience.



Sanat Patel

AVANA Companies
Chief Lending Officer

Sanat Patel is co-founder and CLO of AVANA Companies has and has over 30 years of industry experience with a track record in net income and balance sheet growth for financial institutions. He was instrumental in creating niche-lending programs across the United States for small business owners and developing “social underwriting” for customers at AVANA Companies. Prior to JP Morgan, Sanat spent many years in various executive positions for Citigroup, Wells Fargo Bank and Household Bank. Sanat is a 2021 graduate of the MBA Program offered by UCLA Anderson School of Business and, completed Banking Management in 2008 offered by the Pacific Coast Banking School. He graduated in 1989 from California State University at Fullerton. Sanat Patel serves as a director and Chairman of the BHC and FSB of Abilene, as well as the President of the BHC. Sanat is a founding board member of the Association for Corporate Growth, Arizona Chapter and is Chairman Emeritus of the ACG Arizona Chapter. He is President of Pratham Phoenix and has served on the board of the Arizona Chapter of the Make A Wish Foundation.

TUESDAY SPEAKERS



Jeremy Glassman

Lument
Managing Director

Risk team at Lument where he oversees physical and construction risk management for debt transactions with construction risk components, including deals originated under Fannie Mae, Freddie Mac, and FHA programs.

Jeremy has been with Lument (previously Hunt Real Estate Capital) for the past eight years. Prior to joining Lument, Mr. Glassman served as a Regional Vice President and Regional Manager for the IVI Companies for more than 18 years. He has personally conducted over 2,000 property condition site visits and has overseen construction monitoring for more than \$200,000,000 in residential, industrial, office, and hotel projects. In his previous role, Jeremy oversaw a team of professional architects and engineers. He also assisted in training, mentoring, and reviewing Property Condition Reports for CMBS lenders, equity investors and purchasers, and Agency Lenders including Fannie Mae, Freddie Mac, and HUD 232 and 223(f) projects. Jeremy earned his BS in engineering from Tulane University. He is a licensed professional engineer in the state of New York, is LEED certified, and has completed Housing and Urban Development (HUD) certification training.



Justin Preftakes

Barings Real Estate
Managing Director

Justin heads Barings' construction lending platform. Justin's team works with portfolio management, debt origination, credit and underwriting and asset management to originate, structure, close and service construction whole loans, mezzanine development loans and construction-to-permanent loans. Justin joined the firm in 2006 and his experience has encompassed high yield lending, mezzanine and preferred equity originations, analysis of tax credit investments, equity asset management of real estate owned properties as well as various capital markets duties including analysis of investments in subordinated CMBS, unsecured REIT debt and private real estate funds



Brady Mills

Partner Energy
Senior Technical Manager

Mr. Mills is a Senior Technical Manager with fifteen years of experience in multifamily and commercial architecture, engineering, construction, and real estate industries. He specializes in mitigation and adaptation to physical and transitional climate change risks via asset and portfolio level data collection, reporting, goal setting, and achievement. Specific areas of expertise include due diligence reports, ESG benchmarking, utility benchmarking, carbon accounting, energy and water audits, decarbonization roadmaps, and property resilience assessments.

TUESDAY SPEAKERS



Kevin McElroy

Wells Fargo Bank
Sr. Lead Construction Consultant, VP, REVS Construction

Kevin McElroy has 27 years' experience as a Construction Consultant with Wells Fargo Bank. He started as a field inspector, moved into the role of a reviewer, and currently focuses on vendor management, updating and implementing procedures and initiatives. He has decades of experience in reviewing upfront plan and cost reviews, monthly disbursement inspections, and property condition reports. Projects include land development, multi-family, office, industrial ranging from \$100,000 to \$2,500,000,000. Prior to joining Wells Fargo, he spent time in the field as an operator and carpenter.



Eric Enloe

Partner Valuation Advisors
Senior Managing Director

Eric L. Enloe, MAI, CRE, FRICS serves as a founder and national co-leader of Partner Valuation Advisors, LLC. Mr. Enloe has over 20 years of commercial real estate experience valuing and advising on retail, office, industrial, multifamily, manufactured housing, self-storage, regional malls, and special use assets and has appraised commercial real estate in all 50 States as well as Canada, Mexico, and Puerto Rico. Mr. Enloe has fostered deep real estate valuation ties with major financial institutions, pension funds, REITS, hedge funds, and insurance companies. Enloe has significant experience leading large national portfolio's. Historically, Enloe has had success assembling valuation team's in the markets such as New York, Phoenix, Washington, D.C., Columbus, Detroit, San Francisco, Los Angeles, and Seattle. Prior to Partner Valuation Advisors, Mr. Enloe was one of the founder's of JLL's Valuation & Advisory team nationally and the Head of Commercial Valuation.



Robert Barone, RA, LEED AP

Partner Engineering and Science, Inc.
Director of Institutional Construction Services

A trusted and respected industry veteran, Robert W. Barone, RA, LEED AP is a Director based out of Partner's White Plains, NY office. With almost 40 years of experience in the commercial real estate industry, Barone has managed and provided consulting on billions of dollars in real estate transactions and development projects. Barone's expertise includes consulting on a wide range of projects in the commercial and residential areas, with a strong concentration in complex mixed-use projects. He has monitored a large number of construction projects, including: City Center, in Las Vegas; Wynn Las Vegas, resort and casino in Las Vegas; Trump International Hotel & Tower, a 96-story mixed use building in Chicago; The Cosmopolitan, a resort and casino in Las Vegas; Time Warner Center, a mixed-use building in Manhattan; Xanadu, an enclosed mall in East Rutherford, New Jersey; and Atlantis – Phase III, a expansion of the Nassau, Bahamas resort. A pioneer in the establishment of sound due diligence and construction risk management practices, Barone served as co-chairman of ASTM's E50's committee.

TUESDAY SPEAKERS



Harry Baulch, CCM

Truist
Construction Manager, VP

Truist - Construction Manager. RECAD Department Construction administration. Previously, ATLANTIC GENERAL CONSTRUCTION SERVICES, INC. a construction consulting, risk management and construction management company based foundationally on proven leadership and managerial skills built over 33 years of experience in domestic and international construction markets. The client list of Atlantic General covers the complete spectrum of clients in the industry including consultants, financial institutions, owners, architects, general contractors, subcontractors, material manufacturers. The range of work successfully delivered by AGCS includes governmental (federal, state and local), industrial, institutional, automotive, medical & research, retail & commercial, multi-family.



Stephen Barcus

Capital Impact Partners/Momentum Capital
Senior Construction Services Manager

Stephen oversees the construction services department at Capital Impact Partners, a Community Development Financial Institution, a CDFI specializing in low income housing, education, healthcare, and assisted living. His team is responsible for risk management and construction due diligence on construction loan closings, and fund control on active construction loans. He came to financial services by way of construction and engineering, and is a licensed general contractor and inspector. In the 15 years before joining Capital Impact Partners Stephen worked as a tradesperson, an engineer, project manager, general contractor, and construction consultant on projects including residential, commercial, hospitality, gaming, municipal, and heavy industry. His graduate research in Civil Engineering includes topics such as: dispute resolution, defect management, and new technology in construction.



Shelley Souza

The Bancorp
Director, SBL Construction Manager

Director/SBA Construction Loan Manager for The Bancorp for the past 6 years. Manages a team of Construction Officer that handle the SBA Construction Portfolio across the Country. Prior to The Bancorp, spent 13 years at Wells Fargo on the West Coast as an SBA Construction Loan Manager handling a large portfolio of SBA Construction Loans throughout California. Started SBA Construction Lending with US Bank as a Construction Officer for 5 years and moved to Temecula Valley Bank as the SBA and SFR Construction Loan Manager for 3 years prior to moving to Wells Fargo.

TUESDAY SPEAKERS



Ryan Duff

Berkadia
Vice President, FHA Construction

Ryan Duff joined Berkadia in June 2021 as Vice President of FHA Construction. In this role, he is responsible for reimagining Berkadia's FHA construction platform to manage dynamic volume growth, increased project complexity and market volatility. Ryan has implemented a successful transformation plan focused on developing talent, optimizing technology, and improving processes. Prior to joining Berkadia, Ryan spent 10 years at PGIM Real Estate establishing their international high yield business in Europe/Australia and managing their US construction platform, which included FHA, Fannie Mae, Freddie Mac, and conventional projects.



James Robertson

Lincoln Capital Management
Managing Partner & Chief Risk Officer

Mr. Robertson is the Founder & Chief Risk Officer of Lincoln Capital Management, LLC that operates a national lending business from Dallas, Texas originating senior and subordinated interim (or "bridge") loans for construction and other real estate & equipment transactions in connection with the SBA Section 504 & SBA Section 7(a) programs; the USDA's B&I rural lending program. Mr. Robertson is an experienced, bottom line oriented executive with broad experience in real estate finance, credit underwriting, risk analysis, investment and development. He has a distinguished 40-year success record and a reputation for creative problem solving with strong analytical ability and understanding of the capital markets. He has hands-on experience in the management of diversified real estate organizations and portfolios. He nurtures and cultivates dynamic strategic business alliances. He has strong marketing and people skills based on the principles of impeccable integrity and work ethic.



Trey Meers

Wintrust Financial
Senior Vice President, Real Estate Services

Experienced professional in Construction Loan Risk Management and Commercial Real Estate Finance, with a demonstrated history of working in Risk Management in the financial services industry. I have a strong track record starting new departments, establishing new policies, and filling out staff. Skilled in Construction Loans, Lien Laws, Management, and Training, with a history of Commercial Development and Property Management. Eagle Scout and graduate of University of Illinois at Urbana-Champaign.

TUESDAY SPEAKERS



Dave Wald

Wald Realty Advisors
President

Dave Wald is the founder and President of Wald Realty Advisors. Wald Realty Advisors has been helping clients buy, build, operate, reposition, restructure, and sell commercial, multi-family and a wide array of specialty real estate since 1990 as advisor, receiver, asset manager and development manager. The firm has completed hundreds of assignments on billions of dollars of real estate for companies, high net worth families, lenders, public agencies and state and federal courts, having worked with more than 70 lenders and numerous investors on a wide variety of real estate product types. Among other things, the firm is particularly skilled at navigating and managing the 'family dynamics' associated with generational private ownership transition, portfolio restructuring and reorganization. The firm also has significant, specialized expertise with the completion, re-entitlement, leasing and sale of distressed construction and development projects, working with lenders, investors, and the courts. Dave holds California brokerage and general contractors' licenses and is an Ex Officio member of the Board of Directors of the California Receiver's Forum.



Alfredo Zullo

Capital One
Director, Construction Risk Management

Alfredo has more than 25 years of commercial real estate experience managing construction risk, operations, construction administration, portfolio reporting and balance sheet optimization. He is based out of New York City and currently leads the Construction Risk Management team at Capital One, NA. The group covers commercial real estate, community finance and middle market activities. He previously was a Managing Director at MUFG Union Bank's Institutional Markets Division and oversaw over \$4.5 billion of construction loans. Prior to this, Alfredo led construction administration, operations, and due diligence teams PB Capital Corporation, a subsidiary of Deutsche Bank, and Hypo Real Estate Corporation. During this time, he oversaw over \$15 billion of construction loans ranging from smaller local developers to several trophy mixed-use developments in NYC that cost more than \$1 billion.

WEDNESDAY SPEAKERS



Bill Tryon

Partner Engineering and Science, Inc.
Chief Strategy Officer- Principal

With over 30 years in the industry, Bill Tryon has developed risk management policies and procedures for one of the world's top real estate lenders and has participated with government agencies to refine policies and requirements. He has developed a reputation for risk-based problem solving and excellence. As Chief of Construction and Environmental Services for a major real estate lender, he pioneered standards for the evaluation of environmental liabilities, property conditions, seismic and mold assessment activities. Many of his innovations and refinements have become common practice in the industry. He continues to influence due diligence practices as a member of the Environmental Banker's Association, Co-Chair of the ASTM committee developing standards governing Property Condition Assessment, participation in additional ASTM committees, and Executive Director of the Construction Lender's Risk Management Roundtable. As Partner's Chief Strategy Officer, Mr. Tryon monitors industry trends and works with clients and the industry to develop policies and practices in response to emerging issues.



Joseph Hoge

Office of the Comptroller of the Currency (OCC)
Commercial Credit Lead Expert, Community Bank Supervision Unit

Joe Hoge is a Commercial Credit Lead Expert in the Community Bank Supervision unit of the Office of the Comptroller of the Currency. Joe supports field offices through the south and southeast United States. Joe has been with the OCC for 10 years and was previously a Bank Examiner – Commercial Credit for the Roanoke, Virginia office. Prior to his OCC employment, Joe was employed in the banking industry for 24 years with the last 14 years as Director of Loan Review for the former StellarOne Bank headquartered in Christiansburg, Virginia. Joe has experience in assessing complex construction loans.



Kelly Javier, MBA

Partner Engineering and Science, Inc.
Principal, Marketing Director

Kelly Javier has 20+ years of cross-functional marketing leader with a proven track record of success. Comprehensive background in the development, execution, and implementation of marketing campaigns. Passionate about helping to mentor and develop professionals into future leaders.

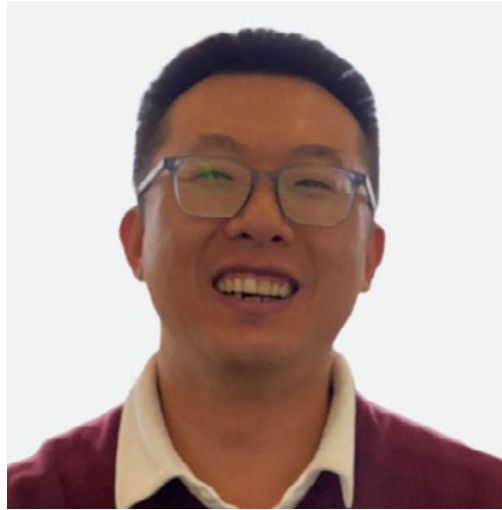
WEDNESDAY SPEAKERS



Stacy Thomson, PE

Barings
Director - Engineering

Ms. Stacy Thomson, PE is the Eastern Region Director of Engineering for Barings Real Estate, and responsible for engineering evaluations of Barings' commercial real estate mortgage and construction loan investments for the eastern U.S. She earned a Bachelor of Science in Civil/Structural Engineering from the University of Illinois and is a licensed professional engineer.



Frank He

Parkview Financial
Managing Director, Partner

Frank He is the Managing Director, Head of Construction at Parkview Financial. Frank leads a nationwide team of engineers and architects and oversees Parkview's construction loan portfolio. Since joining Parkview Financial in 2016, Frank has helped Parkview to double digit growth every year. Frank received a M.S. in Engineering from University of Southern California and is an active member of the American Society of Professional Estimators. In his spare time, Frank enjoys his weekends exploring national parks, golfing with friends and reading books.

EVENING ACTIVITIES

ALL EVENING ACTIVITIES ARE OPTIONAL AND HIGHLY ENCOURAGED BY US AND OUR MEMBERS.

At the end of each conference day are evening activities for our CLRM registered guests. We hope after a long day of 'learn, share, and build' you are able to loosen up in groups to experience something new in the historic New Orleans. As our guests, these activities are entirely optional and also complimentary. We hope you join us on both Tuesday and Wednesday night, cheers!

TUESDAY



NOLA's French Quarter/Haunted History Tour & Dinner

Join us for a walking tour of either the French Quarter's architecture, history, and people... or, join the Best Ghost tour to learn about why NOLA is considered America's most haunted city and visit top spots of paranormal activity. Dinner will follow the tour at New Orleans' oldest restaurant (since 1840), Antoine's Restaurant. This world-renowned French-Creole cuisine, is still owned and operated by the fifth generation relatives.

WEDNESDAY



NOLA Mixology

Love it or leave it, it's no secret that New Orleans culture and lifestyle often coexist with—if not revolve around—drinking and nightlife. From soaring dancefloor highs to Bourbon Street puddle lows, the city's earned its reputation among the uninitiated as a "wasted wonderland." Join us for a fun libation lesson and hands-on instruction on how to make classic cocktails that are so popular in the Big Easy.



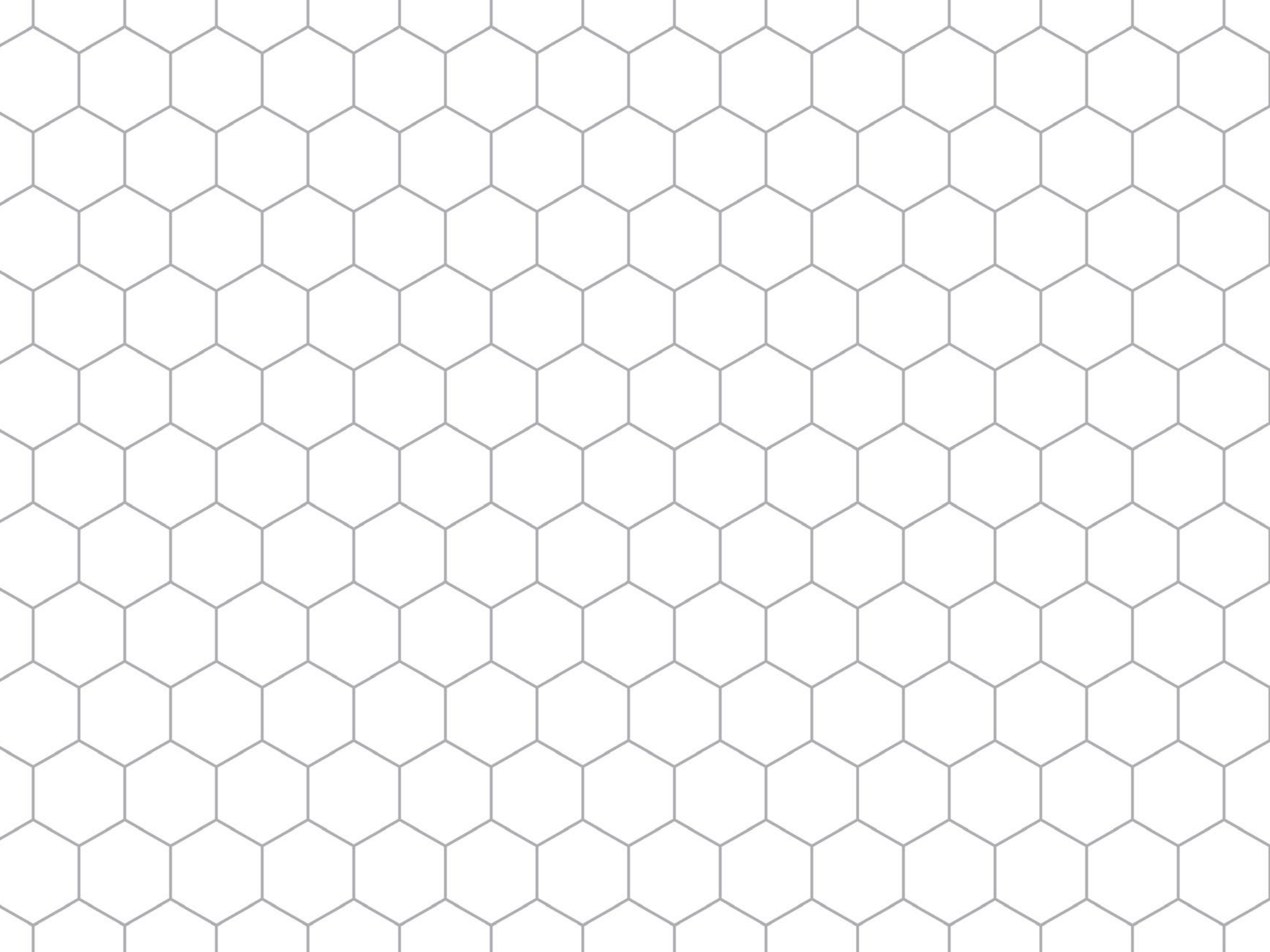
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