

21st Annual Workshop Agenda

Monday, March 19, 2018



Wisconsin Health and Educational
Facilities Authority

Morning

7:30 a.m. – 8:30 a.m.
(Grand Ballroom Foyer)

Registration

7:30 a.m. – 8:30 a.m.
(Grand Salon)

Hot Breakfast

8:30 a.m. – 8:45 a.m.
(Grand Ballroom)

Welcome & Review of WHEFA Activities

Dennis Reilly, Executive Director; WHEFA

8:45 a.m. – 10:00 a.m.
(Grand Ballroom)

Market Updates Post Tax Reform

*Erik Kelly, President; Blue Rose Capital Advisors
Lynn Daly, Managing Director; BB&T Capital Markets
Chris Smith, SVP Regional Executive, BBVA Compass*

10:00 a.m. – 10:15 a.m.
(Grand Ballroom Foyer)

Break

10:15 a.m. – 11:30 a.m.
(Grand Ballroom)

Post Issuance Tax Compliance

*Caleb Lansky, Associate Director; BLX Group, New York Office
Sheri Bryan, Bond Compliance Officer; Pacific Retirement Services*

11:30 a.m. – 12:15 p.m.
(Grand Ballroom)

Investment & Economic Outlook

Jeff Neer, Client Portfolio Manager; PNC Capital Advisors

Noon

12:15 p.m. – 12:45 p.m.
(Grand Salon)

Lunch

12:45 p.m. – 1:30 p.m.
(Grand Salon)

Lunch Speaker

Afternoon

1:30 p.m. – 2:30 p.m.
(Grand Ballroom)

Financing Ancillary Facilities

Jerimi Ullom, Attorney; Hall, Render, Killian, Heath & Lyman

2:30 p.m. – 3:15 p.m.
(Grand Ballroom)

Informed Decision Making

Michael Peer, Principal; CliftonLarsonAllen LLP

3:15 p.m. – 4:00 p.m.
(Grand Ballroom Foyer)

Reception

4:00 p.m.

Adjournment