

Speaker Bio's

Robert Beach – Forward Community Investments



As the Director of Capital Strategy, Rob manages the structuring and implementation of financing to borrowers across the state of Wisconsin. In this role, he identifies market gaps and unmet financing needs and provides thought leadership on the development of new financial products. This includes the management of the organization's New Markets Tax Credit portfolio and review of the CDFI Fund related compliance and deployment requirements. Prior to FCI, Rob worked for a Chicago-based urban planning and New Markets Tax Credit consultancy where he focused on community supported real estate development projects across the country. Rob started his career with the Local Initiatives Support Corporation National and NYC offices where he worked to develop the capacity and connect community-based organizations to financing. During his career, Rob has provided over \$325 million in financing for operations and real estate development projects to mission-aligned organizations. Rob holds a dual degree in Political Science and Legal Studies from the University of Wisconsin - Madison and a Master in Public Administration with a focus on urban development and sustainability from Baruch College in New York.

Jared Brewster – Moody's



Jared Brewster is a Vice President/Senior Analyst for the Higher Education and Not-for-Profits Ratings Team covering higher education and not-for-profit institutions across the United States with a focus on the Midwest. Before joining Moody's, Jared worked as a Director of Research for a private foundation. Prior to working at the foundation, Jared was a Principal Analyst at the Congressional Budget Office where he was responsible for estimating and projecting debt and interest costs of the federal government. Jared holds an MPA from the University of Delaware and a BA in Political Science from Capital University.

Jennifer Brown – Ponder & Co.



Ms. Brown has more than 20 years of experience in healthcare finance and investment banking. She joined Ponder & Co. in 2002 and is a managing director for the Capital Advisory Group, serving as financial advisor to a variety of healthcare clients, primarily acute care hospitals and health systems nationwide. She has maintained long-standing relationships with her clients through an emphasis on strategic capital planning and consistent, unbiased advice and advocacy in the capital markets. Ms. Brown holds an M.B.A. with concentration in finance and healthcare management from Northwestern University's J.L. Kellogg Graduate School of Management in Evanston, Illinois and B.S. degrees in business administration and exercise science from Lake Superior State University in Sault Ste. Marie, Michigan. She is a registered Municipal Advisor (Series 50).

Suzie Desai – S&P Global Ratings



Suzie Desai is a Senior Director and sector leader for the not-for-profit healthcare group. She is the group spokesperson for the not-for-profit healthcare group and is responsible for all aspects of the health care practice including criteria development and analytical thought leadership. She covers several large health care systems and standalone hospitals and is involved in other aspects of the not-for-profit health care practice including long-term care and human service providers. Suzie chairs and participates in credit committees for health care organizations across the country. Suzie also authors publications and special reports in the health care sector and participates in speeches and panel discussions covering various health care related topics. Suzie joined S&P Global Ratings in July 2003, and is located in the Chicago office. Before joining S&P Global Ratings, Suzie was a consultant for a marketing strategy consulting firm where she focused primarily on the technology and pharmaceutical sectors. Suzie has also been a board member of the Chicago Municipal Analysts Society (CMAS) from 2012-2014 and is a member of the Healthcare Financial Management Association. Suzie holds a bachelor's degree in public policy from Brown University and a business degree (with a focus in public management and finance) from Yale University.

Rene Eastman – Leading Age Wisconsin



Rene Eastman is the Vice President of Financial & Regulatory Services at LeadingAge Wisconsin, the statewide association for mission driven long term care providers. Rene has law and accounting degrees from UW-Madison and previously worked as the Section Manager for nursing home policy and rate setting at the Wisconsin Department of Health Services. Rene also has experience working with Epic's hospital billing product and assists healthcare providers of all types with reimbursement and regulatory challenges. She is passionate about navigating through red tape to provide quality, efficient care.

Nathan Fronk - Quarles



Nathan Fronk is a Partner with Quarles & Brady LLP, assisting clients with public finance and commercial finance matters, particularly tax-exempt bond transactions for 501(c)(3) organizations. He serves as bond counsel, underwriter's counsel, borrower's counsel and bank counsel on a variety of taxable and tax-exempt bond transactions, including 501(c)(3) bonds for clients such as: independent colleges and universities; private elementary and secondary schools; health care systems; senior living providers and other nonprofits. Nathan works as a trusted advisor and advocate in partnership with his clients to help them achieve their goals. He applies his extensive knowledge of various financing structures, actively listens to his clients' goals, concerns, and objectives, and distills complex financial structures and decisions to achieve his clients' desired outcome while helping to protect their interests.

Joe Hegner – Barclays



Joe Hegner serves as the Managing Director, Head of Healthcare at Barclays Investment Bank. Joe has over 30 years of experience in investment banking for not-for-profit healthcare systems. Joe joined the Barclays Healthcare team in the Chicago office in 2018 after spending 15 years at Merrill Lynch. Prior to Merrill, he was in the healthcare group at Goldman Sachs. During his career, Joe has worked on various assignments for his clients including tax-exempt/taxable bond underwritings, derivative strategies, and M&A engagements. Joe received a Bachelor's of Business Administration degree from UW-Whitewater and a Masters of Business Administration from the University of Wisconsin.

Margaret Johnson – Fitch Ratings



Margaret Johnson is a Senior Director in Fitch's U.S. Public Finance Department, where she is the Sector Lead for Life Plan Communities in the Healthcare group. Margaret joined Fitch in 2016 and is based in New York City. Prior to joining Fitch, Margaret was a Director at BlackRock, serving most recently as a Portfolio Manager on the Institutional and Wealth Management Municipal Strategies team. Prior to that, she was a municipal credit analyst at Merrill Lynch Investment Managers, until it was acquired by BlackRock in 2006. As an analyst, Margaret covered a portfolio of credits primarily in the healthcare, senior living and education sectors, as well as tax-backed issuers and public utilities. Margaret earned a BA (with honors) in Government and Legal Studies from Bowdoin College and is a Certified Financial Planner™ Charterholder.

Kimberly Johnston – PACE Wisconsin: Slipstream



With more than 25 years of experience in energy efficiency, finance and market development, she leads market development efforts for Wisconsin's commercial property assessed clean energy (C-PACE) programs: PACE Wisconsin and the City of Milwaukee C-PACE Program. The programs are implemented by Slipstream, a Wisconsin-based non-profit that is accelerating climate solutions. Prior to joining Slipstream, Kimberly worked for World Council of Credit Unions developing credit union financing programs, products and services.

Dana Lach – Foley & Lardner



Dana M. Lach is of counsel and a business lawyer with Foley & Lardner LLP, with more than 20 years' experience encompassing a broad range of financings for non-profit, governmental and for-profit entities. Her clients include corporate and governmental issuers, institutional lenders and purchasers, investment banks and other commercial loan and finance participants. Dana is chair of the firm's Health Care Finance team and a member of the firm's Finance & Financial Institutions; Public Finance and Project Finance Practices; The Healthcare Team; as well as the Environmental, Social, and Corporate Governance (ESG) Team. Dana works closely with her clients in structuring financings for development projects, including governmental, health care, manufacturing, infrastructure, cultural and educational facilities, using tax-exempt and taxable bonds, commercial loans, and nontraditional financing products such as commercial paper programs and securitizations, and derivative transactions. In addition, she also provides structuring advice to corporate clients, in applying both federal and state law tax requirements. Her tax experience also includes providing guidance on "remedial actions" for changes in use of bond financed facilities, and information reporting for the IRS Form 990, Schedule K.

Joyce Mallory – Heroes for Healthcare



Joyce is an experienced nonprofit professional with over forty-five years in the sector. During her career she held executive and senior management roles at several organizations, including Nonprofit Center of Milwaukee, Malaika Early Learning Center, Fort Wayne Urban League, and United Way of Greater Milwaukee. Joyce joined Heroes for Healthcare in May 2019 as their Community Engagement Manager. In this role she uses her energetic personality, organizational skills, and extensive network in the nonprofit sector to promote the organization’s mission and develop relationships in the veteran community, military bases, healthcare associations, and healthcare systems in Southeast Wisconsin and across the state. She values the opportunity to promote hiring Military Medics, Corpsmen and Medical Technicians and veterans with military healthcare experience and training to help address the State’s workforce shortage in healthcare. Joyce holds a BA in Sociology, Tougaloo College and MA in Education, Alverno College. Her civic engagement includes serving on the MetaStar Board of Trustees, and Vice Chair of the City of Milwaukee Charter School Review Committee. Earlier in her career she served ten years as an elected member of the Milwaukee School Board. Joyce is the proud mother of a son and two grandchildren, who attend Loyola University Chicago.

Mike Musselman – Fifth Third Bank



Mike Musselman is the Director of Regional Portfolio Management for the Chicago/Illinois region of Fifth Third Private Bank. He has been with the organization for over 18 years, serving in various investment research, portfolio management, and leadership roles over that time. In addition to Mike’s expertise in the areas of economics and financial markets, he has deep experience in client relationship management, portfolio management, securities analysis, manager due diligence, and team building. In addition to working directly with many of the bank’s high net worth clients, Mike leads a team of local portfolio managers with over \$5 billion in client assets under management. He also sits on the leadership team for Fifth Third Private Bank in Chicago. In addition, Mike works with Fifth Third Bank’s Investment Strategy Team, helping to form the firm’s views on the economy and markets and how that translates to investment decision making and implementation in client portfolios. In this role, Mike speaks on behalf of the bank both locally in Chicago as well as nationally on various economic and financial market topics. Mike has a BA in Finance from Illinois Wesleyan University and an MBA in Finance from DePaul University’s Kellstadt Graduate School of Business. He is a Certified Financial Planner™ and a Certified Investment Management Analyst®.

Kelsey Otero – Marquette University



Kelsey Otero is the Senior Director of Community Engagement at Marquette University. She serves as the chief community engagement officer, leading and cultivating collaborative, bi-directional relationships with local, state, regional, national, and global communities to advance the mission and vision of Marquette. Kelsey is known for her creative and collaborative approach to building partnerships and launching new initiatives. Under her leadership, Marquette University created the 707 Hub, a nationally recognized innovation space, where the business ideas of students and community members are shared and supported. Kelsey is passionate about economic development in Milwaukee, serving as Co-Chair of the Near West Side Commercial Corridor Working Team, volunteering on the Fund Milwaukee board, and running the popular Rev-Up MKE business pitch competition for Near West Side Partners. She was recently selected to the Anchor Fellows Program, through AITF, to develop the next generation of anchor leaders. She is a graduate of the University of Notre Dame and earned her MBA from Marquette University. In 2019 she was recognized as one of Milwaukee Business Journal’s 40 Under 40 winners.

Kurt Reinhold - Legacy Solar Co-op



Kurt has experience working in and with many cooperatives over the years, as well as with an international CPA firm that has developed over \$3 Billion in energy projects. He has developed over 40 community solar projects with Legacy Solar Co-op all around Wisconsin, including 2 with Leading Age members.

Nessy Shems - Piper Jaffray



Nessy is a Managing Director in the Healthcare Finance group at Piper Jaffray where he is focused on designing and implementing leverage capital solutions and providing strategic capital planning advice for a variety of healthcare borrowers. Since 1997, Mr. Shems has been involved in financings representing in excess of \$5 billion of bond par value for a variety of healthcare issuers throughout the country. Nessy was the 2010 recipient of the Wisconsin Health and Educational Facilities Authority Award of Excellence for contributions made in providing capital for Wisconsin's health and education industries.

Gregory Wesley - Medical College of Wisconsin



Gregory M. Wesley, JD, is senior vice president, strategic alliances, and business development and interim General Counsel at the Medical College of Wisconsin (MCW), where he serves as a key strategic leader, ambassador, and advisor responsible for, among other things, ensuring the execution of MCW's initiatives and projects through established and emerging partnerships. A former private-practice lawyer and MCW trustee, Wesley currently serves on the boards of MHS Health Wisconsin, Milwaukee World Festival, Inc., the Greater Milwaukee Committee, the YMCA of Metropolitan Milwaukee, Teach for America Milwaukee (Chairman), and Versiti, Inc., among others. He is an independent trustee of the Trust for Professional Managers, the Greater Milwaukee Foundation, the Johnson Foundation at Wingspread, and the Boys & Girls Clubs of Greater Milwaukee (Chairman). Additionally, he is a Milwaukee County supplemental court commissioner, a fellow of the Wisconsin Law Foundation and has been regularly recognized by The Best Lawyers in America. Wesley earned his undergraduate degree from Indiana University-Bloomington and his law degree from the University of Wisconsin-Madison.