

Workshop Agenda

Monday, March 27, 2023



Wisconsin Health and Educational
Facilities Authority

Morning

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

Registration

7:30 a.m. – 8:30 a.m.
(Oakton Ballroom)

Breakfast

8:30 a.m. – 8:45 a.m.
(Lake Country Ballroom)

Welcome & Review of WHEFA Activities

Larry Wiemer, Executive Director; WHEFA

8:45 a.m. – 9:45 a.m.
(Lake Country Ballroom)

Economic and Political Landscape

Mike Musselman, Senior Vice President; Fifth Third Bank

9:45 a.m. – 10:15 a.m.

Trends in Tax-Exempt Debt

Nathan Fronk, Partner; Quarles

10:15 a.m. – 10:30 a.m.

Break / Networking

10:30 a.m. – 11:45 a.m.
(Lake Country Ballroom)

Panel – Rating Agency Updates

Margaret Johnson, Senior Director; Fitch Ratings
Jared Brewster, Vice President/Sr. Analyst; Moody's Investors Service
Suzie Desai, Senior Director; S&P Global Ratings
Moderator: Tatiana Graver, Associate Executive Director; WHEFA

Noon

11:45 a.m. – 12:45 p.m.
(Oakton Ballroom)

Lunch

12:15 p.m. – 12:45 p.m.
(Oakton Ballroom)

Lunch Speaker

Joyce Mallory, Community Engagement Mgr.; Heroes for Healthcare

Afternoon

1:00 p.m. – 1:45 p.m.
(Lake Country Ballroom)

Panel - Supplemental Financing Opportunities

Kurt Reinhold, Chief Executive & President; Legacy Solar Cooperative
Robert Beach, Dir. Capital Strategy; Forward Community Investments
Kimberly Johnston, Market Development Director; PACE Wisconsin
Moderator: Larry Wiemer, Executive Director; WHEFA

1:45 p.m. – 2:45 p.m.
(Lake Country Ballroom)

Panel – Opportunities in the Current Market Environment

Nessy Shems, Managing Director; Piper Sandler
Jennifer Brown, Managing Director; Ponder & Co.
Dana Lach, Of Counsel; Foley & Lardner
Moderator: Joe Hegner, Managing Director; Barclays

2:45 p.m. – 3:45 p.m.
(Lake Country Ballroom)

Panel – Community Collaboration / Partnership

Greg Wesley, Senior Vice President; Medical College of Wisconsin
Kelsey Otero, Sr. Director of Community Engagement; Marquette Univ.
Rene Eastman, Vice President; LeadingAge Wisconsin
Moderator: Larry Wiemer, Executive Director; WHEFA

3:45 p.m.

Adjournment