



Wisconsin Health and Educational
Facilities Authority

**Milwaukee
Marriott
West**

**Tuesday,
September
30, 2025**

Insights Into Capital Finance

[Register Here](#)

Workshop Agenda

7:30 a.m. - 8:30 a.m.	Registration & Continental Breakfast
8:30 a.m. - 8:45 a.m.	Welcome & Review of WHEFA Activities Larry Wiemer, Executive Director; WHEFA
8:45 a.m. - 9:45 a.m.	Economic and Market Update Kathryn Lyons, Regional Director of Investments; BMO Wealth Management
9:45 a.m. – 10:45 a.m.	PANEL - Sector Updates Health Care – Marek Kowalewski, SVP; Kaufman Hall Senior Living – Romy McCarthy, Managing Director; D.A. Davidson Higher Education – Brandon Lippold, VP; Blue Rose
10:45 a.m. – 11:00 a.m.	Break
11:00 a.m. - 11:45 a.m.	PANEL - Tax-Exempt Bonds: Trends, Innovations and Drivers of Change Nathan Fronk, Partner; Quarles
11:45 a.m. - 12:30 p.m.	Lunch
12:30 p.m. - 1:15 p.m.	Lunch Speaker: What's Working for Wisconsin's Economy Dale Kooyenga, Pres. & CEO; Metropolitan Milwaukee Association of Commerce

1:15 p.m. - 2:00 p.m.	Does the Muni World Really Need Blockchain? Jeff White, Managing Director; Columbia Capital Management
2:00 p.m. – 2:45 p.m.	The Overlooked Line Item: Unlocking Financial Value Through Energy in Operations Jeff Rich, Chief Innovation Officer; Eneration Mike O'Neill, Director of Finance; Eneration
2:45 p.m.	Closing Remarks

Recommended Participants

This workshop, offered at no cost to participants, is an effort by WHEFA to provide our constituents the latest information on issues affecting access to capital finance.

This free workshop is designed for those who would like to keep abreast of the latest issues affecting their outstanding debt and future capital access.

Participants will also learn about collaboration opportunities within their industry, as well as new financing techniques that may be of value to them.

Whether you currently have bonds outstanding or are contemplating your first financing with WHEFA, this free workshop is a great resource to learn from, and network with your colleagues.

Workshop Location

Milwaukee Marriott West
W231N1600 Corporate Ct.
Waukesha, WI 53186
www.marriott.com
Hotel Number: (262) 574-0888

Workshop Topics

Welcome & Review of Recent Activities

Overview of workshop agenda and update on WHEFA operations and activities.

Economic and Market Update

Tax-reform, tariffs, immigration, housing, labor.....there seems to be a never-ending list of forces buffeting the economy, investment market and bond market. What is the current state of affairs?...Where do we think it may be going....? How can you best position your organizations to succeed?

Sector Updates

Hear from experts regarding trends, issues and headwinds facing the healthcare, senior living and higher education sectors. More importantly, learn about the common themes facing each sector, and explore how to turn your challenges into opportunities.

PANEL - Tax-Exempt Bonds: Trends, Innovations and Drivers of Change

This panel presentation will address recent legislative and legal activity pertaining to the issuance of tax-exempt debt, including opportunities and risks regarding how this activity may impact borrowers.

What's Working for Wisconsin's Economy

Dale Kooyenga, President & CEO of Metropolitan Milwaukee Association of Commerce will provide an overview of the current business climate throughout Wisconsin and how best to leverage relationships with your legislator to drive economic impact in your community.

Does the Muni World Really Need Blockchain?

While AI-everything is sweeping the world right now, last week's new-new thing was all about blockchain. Blockchain fever swept into the Muni market with talk of Bitcoin bonds and direct-to-investor bond sales. Is there anything to all of this talk? And what the heck is blockchain anyway? Here's your chance to learn the answers to those questions...or to pretend your office is calling and you need to slip out for an hour!

The Overlooked Line Item: Unlocking Financial Value Through Energy in Healthcare

Learn how smart energy design strategies can improve operating margins, reduce future capital needs, and mitigate risk from volatile utility prices. Practical tools, proven methods, and case studies that illustrate how energy-smart design can deliver meaningful financial returns across the lifespan of a new facility will be shared.

This workshop highlights

Trends in
Tax-Exempt
Debt

Current
Market
Dynamics

Economic &
Market
Landscape

Questions?

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