



Peer Support Network
October 12, 2010
Portland, OR
University Place (300 SW Lincoln Street)

Agenda
Financial Managers
Facilitator: Kay Sohl, Kay Sohl Consulting

9:00 – 9:30	Registration & Refreshments
9:30 – 12:00 (includes break)	Financial Info for Boards of nonprofit affordable housing organizations <ul style="list-style-type: none"> • Facilitator: Kay Sohl • How well does your Board grasp your organization’s financial health and challenges? • What info do you wish your Board understood more clearly? • What info do other affordable housing organizations share with their Boards and Finance Committees? • Dashboards, graphics, narratives, and other strategies
12:00-1:00	Lunch
1:00 – 3:00 (includes break)	LIHTC and New Market Tax Credits – Intersection of Legal and Financial Basics <ul style="list-style-type: none"> • Facilitator: Kay Sohl • Guest: Jan Lasky Vice President for Community Development Lending, Bank of America Merrill Lynch in Seattle • Jan will join fiscal managers for the afternoon discussion of LIHTC and New Market Tax Credit issues. Jan will provide lender/investor perspective on the financial health of nonprofit sponsors of tax credit projects and answer questions about strategies to strengthen sponsor financial health and address apparent financial weaknesses in discussions with potential lenders/investors. • Legal structure choices for entities using LIHTC and NMTC • Accounting choices for sponsors developing new tax credit projects • Impact of tax credit project operation on the financial health of the sponsor • Consolidation and other related entity accounting issues
3:00 – 3:30	Announcements and Next Training