



DAY #1: Wednesday, September 26, 2018

8:00 to 8:45 AM REGISTRATION & REFRESHMENTS

8:45 – 9:00 AM **Greetings from Elizabeth Moreland**

Welcome to the 15th Annual NCP Conference and *Geeks Talk...*, a fresh approach in discussing the practical side of affordable housing!

9:00 – 10:30 AM **News from the Hill and Beyond**

Guests: Scott Michael Dunn, Costello Compliance & Thomas Staggs, Novogradac & Co

To kick things off, Elizabeth welcomes 2 of the NCP Membership Group's favorite "geeks" to discuss the latest news & hot topics affecting affordable housing today.

10:30 – 11:00 AM REFRESHMENT BREAK

11:00 – 12:30 PM **Part I: Aspire to Average?!?**

Guests: Scott Michael Dunn, Costello Compliance & Thomas Staggs, Novogradac & Co

Looking to understand income averaging? Elizabeth continues her interview with our favorite geeks as they discuss the rules surrounding this newest minimum set-side election including their effect on other property rules. (*Practical aspects of this topic will be discussed tomorrow.*)

12:30 – 1:30 PM NETWORKING LUNCH

1:30 – 3:00 PM **Reduce, Reuse, Resyndicate**

*Guests: Missy Covington, Raymond James; Carol Howard, Boston Capital, Elizabeth Dziak, RBC & Rose Guerrero, CA Tax Credit Allocation Committee with **Special Guest: Jen Brewerton, Dominion***

In today's affordable housing world, we are seeing more & more properties resyndicate. Unfortunately, the rules surrounding these allocations are limited & vague leaving us to a myriad of interpretations. Elizabeth tackles this problem head on by chatting with 2 of the largest syndicators in the industry and an experienced State HFA staffer. Plus, Elizabeth welcomes Jen Brewerton from Dominion as she shares how she has handled more than 15 of these allocations in multiple states in the last 2 years.

3:00 – 3:30 PM REFRESHMENT BREAK

3:30 – 5:00 PM **Fair Housing... What NOT To Do**

Performances: By A Motley Crew of Players

Elizabeth invites our favorite troupe of actors as they perform a series of vignettes on fair housing to show how violations aren't always blatant rather usually inadvertant or subtle.

5:00 – 6:15 PM **Optional Bonus Refresher: Don't Be Schooled: Students in Affordable Housing**

Trainer: Scott Michael Dunn, Costello Compliance

Most of us have the LIHC full-time student rule down. Maybe even HUD/HOME/RD's rule. But when it comes to knowing all of the rules and how they play together, things go from complex to crazy! In this session, Scott Michael will discuss rules & the real world issues they bring.

6:15 – 8:00 PM NETWORKING RECEPTION

DAY #2: Thursday, September 27, 2018

9:00 – 10:00 AM NETWORKING BREAKFAST

10:00 – 11:00 AM Part II: Aspire to Average?!?

*Guests: Sharon Ivey, Concord/CED; Mike Price, Travois
Elizabeth Dziak, RBC & Julie Noland, Iowa Finance Authority*

In this episode of *Geeks Talk...*, Elizabeth sits down with guests who have already elected the income averaging set-aside as they share what they have learned so far and how they are monitoring for compliance plus she welcomes industry investors who discuss their approach to this election in the world of uncertainty we currently find ourselves in.

11:00 – 12:30 PM Income Calculation Oddities

*Special Guest Host: Christine Bennett Martin, Ohio Housing Finance Agency
Guests: Elizabeth Moreland, Elizabeth Moreland Consulting;
Gina Metzger, Fairfield Management; and Jen Brewerton, Dominionium*

Welcome guest host... Mrs. Martin... as she & her esteemed guests tackle the newest income & asset oddities surfacing. Think Uber/Lyft & other solo-prenuerships, recurring deposits from online payment apps like PayPal, Venmo & Google Wallet and funding platforms like Go Fund Me & Kickstarter, the latest interpretations on child support/alimony, handling insurance reimbursements & banked overtime reflected on paystubs, etc., etc. ... Perfect time to bring up your income eligibility & verification questions!

12:30 – 1:30 PM NETWORKING LUNCH

1:30 – 3:00 PM Setting Up Your Compliance Shop

*Guests: Thomas Stagg, Novogradac & Co; Scott Michael Dunn, Costello Compliance;
Mike Price, Travois; Sharon Ivey, Concord/CED & Babbie Jaco, Boyd Management*

Usually setting up your compliance shop is an after-thought to winning an allocation award & development of our properties resulting in inexperienced team members, disorganized operations and no policies/procedures in place. This is especially problematic when our portfolios cross into multiple states. Elizabeth welcomes an esteemed panel of compliance operations virtuosos to discuss how they designed & implemented compliance operations that really work including what to get from your development team while the property is still in the pipeline, how to make sound policy decisions when the federal rules are silent, how to negotiate & compromise with your State HFAs & investors when they want you to do more work than necessary and how to implement technology into the mix that helps rather than hinders! If you are frustrated with your operations... you will NOT want to miss this session!

3:00 – 4:30 PM REFRESHMENT BREAK & JEOPARDY GAME

4:30 – 5:00 PM Q&A... Anything Goes

Still have questions from any of our previous session or problems we haven't addressed yet. Your *Geeks Talk...* host, Elizabeth Moreland, opens the floor to questions! Now is the time to get your answers!

5:00 PM ADJOURN UNTIL NEXT YEAR!

Conference attendees will receive 13 continuing education units or credits (CEUs).

A certificate of attendance will be mailed approximately 6 weeks after the Conference.

Conference CEUs may not be used towards the Housing Credit Compliance Diploma HOWEVER they may be used for continuing education for the NCP, HCCP, C3P, & SHCM designations as well as for most State HFA requirements.

If you have further questions, contact us at

1-800-644-0390