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## 2nd ANNUAL INTERFACE SENIORS HOUSING MIDWEST

*June 21, Westin River North, Chicago*



### SPEAKERS



#### **Manisha Bathija**

##### **Senior Investment Officer**

Ventas

Manisha B. Bathija joined Ventas as Senior Investment Officer in May 2011. Ms. Bathija is customer focused and responsible for building relationships in all areas of healthcare real estate. She drives growth and diversification of the Company's real estate portfolio through execution of transactions of all sizes in the Midwest and moderate and large transactions in all areas of healthcare real estate. From 2002 to 2011, Ms. Bathija held various positions in Bank of America Merrill Lynch's Investment Banking Division with the last being Director, where she focused on mergers and acquisitions and debt/equity capital markets transactions for healthcare real estate companies. She received both a B.S. in Accounting and a B.A. in Chemistry from Virginia Polytechnic Institute and State University, as well as an M.B.A. from the Ross (University of Michigan) School of Business. She is also a Certified Public Accountant.



#### **Tom Coble**

##### **Founder and CEO**

Elmbrook Management Company

Tom C. Coble is the founder and CEO of Elmbrook Management Company (EMC). EMC owns and operates 6 skilled nursing facilities and an assisted living facility in southern Oklahoma. Tom is also the founder of HealthCare Management Company of Oklahoma (HMC). HMC specializes in creating long term care based integrated healthcare delivery systems. HMC partners with organizations to evaluate, develop and operate Medicare Advantage Special Need Plans (SNPs) for the dual eligible and institutional populations. Tom owns SNPs in Oklahoma and Arkansas. Prior to entering the long term care industry in 1993 Tom spent over 15 years working in the oil and gas industry. Tom currently serves as Chair of the Board of Governors of the American Health Care Association. Tom testified before the House Small Business Committee on behalf of the American Health Care Association in July of 2008. Tom has also served as president of the Oklahoma Association of HealthCare Providers 2003-2006. Tom has served several legislative appointments including the Medicaid Reform Task Force (2005-2006), Governor's Task Force on Medicaid (2004), Medical Liability Task Force (2003), Oklahoma Continuum of Care Legislative Task Force (1999-2002) and Continuum of Care and Assisted Living Standards Council (1997-1998). Tom also served on the Oklahoma State Board of Examiners for Nursing Home Administrators (2001-2005). Tom has a Bachelor of Science degree from Southeastern Oklahoma State University, Masters of Business Administration from Oklahoma City University and Nursing Home Administration Certification from the University of Oklahoma. He is a licensed Nursing Home Administrator.



#### **Michael Damone**

##### **President**

The Damone Group

Michael J. Damone has been involved in the development and construction industries, particularly senior housing, for the majority of his professional career. After graduating from Michigan State University with a Bachelor of Arts degree in Accounting, he moved to Phoenix and joined Arthur Andersen and Company. In 1990, Mr. Damone decided that he preferred to be involved in the long term care industry. Utilizing his development and construction skills, plus the financial acumen gained at Arthur Andersen, he began to explore the long term care industry. In

construction skills, plus the financial acumen gained at Arthur Andersen, he began to explore the long-term care industry. In August of 1991, Mr. Damone and this company created a joint venture to develop, construct and operate assisted living and memory care buildings in Michigan. Ultimately, this partnership developed 65 senior housing properties together in 10 different states. In 1994, to support his growing senior housing and real estate portfolios, Mr. Damone established The Damone Group to provide development services and Damone Construction to provide construction services. That same year, The Damone Group was approached by General Motors to develop the World Headquarters for Delphi Automotive Systems in Troy, Michigan. This 160,000 SF office and 100,000 SF high-tech research space was valued at over \$50 million and was successfully delivered to Delphi in August of 1997.



### **Jeff Davis**

#### **Founder & CEO**

Cambridge Realty Capital Companies

Jeffrey A. Davis is Chief Executive Officer and Founder for Cambridge Realty Capital Companies, one of the nation's leading senior housing / healthcare financiers with more than 450 closed senior housing / healthcare debt and equity transactions totaling more than \$4.5 billion since the 1990s. Mr. Davis is a graduate of the University of Illinois with a degree in finance. He earned a graduate degree in Real Estate Investment Analysis and Appraisal from the University of Wisconsin in 1976, and joined Baird & Warner Inc., a diversified Chicago-based real estate firm, the same year. In the commercial lending division, he swiftly moved up through the ranks to become the youngest Senior Vice President in the 150-year-old real estate company's history. Mr. Davis founded Cambridge Realty Capital Company in 1983 as a regional commercial real estate lender and merchant banking firm in commercial real estate. During this period of time, Mr. Davis participated in the development of both suburban office and industrial buildings in conjunction with several partners. In 1987, a decision to focus in senior housing / healthcare financing was made, and the company began to expand nationally into new markets. The company has underwritten loans in 35 states and has emerged as one of the nation's leading HUD-232 FHA / LEAN-approved lenders. Clients also are served by an integrated debt / equity financing strategy that includes direct property acquisitions and joint ventures, sale / leasebacks, and conventional debt financing. The company's acquisition arm, Cambridge Investment and Finance has acquired 16 separate senior housing buildings with a current market valuation in excess of \$100 million. These investments have had outstanding performance under Cambridge's stewardship. During the company's transformation into a senior housing finance and investment specialist, Mr. Davis continued to participate in a variety of different commercial real estate activities, primarily as an investor with active management group. He has invested in multifamily, hospitality, office parks, industrial acquisitions and development, as well as private lending activity. Mr. Davis has been active in several professional organizations, including the Urban Land Institute, American Health Care Association, American Senior Housing Association, and National Association for Senior Living Industry, and the Assisted Living Facility Association of America.



### **Ben Firestone**

#### **Managing Director**

Blueprint Healthcare Real Estate Advisors

Ben Firestone is a Senior Managing Director and a Founding Partner of Blueprint Healthcare Real Estate Advisors. Ben's responsibilities include establishing and managing Blueprint's corporate client relationships and co-managing Blueprint's operations. Prior to co-founding Blueprint, Ben was Vice President, Investments at a leading national real estate investment firm. Over the course of a decade-long career, Ben has completed over 100 seniors housing transactions. Ben prides himself on his integrity, accountability and industriousness as well as his ability to deeply identify with both institutional investors and entrepreneurs. Ben received a B.A. in Economics from University of Michigan and received an MBA in Finance, Economics and Entrepreneurship from University of Chicago Booth School of Business. Ben has also completed professional development courses at the Erickson School of Aging and is the Managing Real Estate Broker for Blueprint. Ben maintains an active presence in the seniors housing and care industry and is a member of the NIC Future Leaders Council.



### **Lisa Fordyce**

#### **Chief Operating Officer**

Senior Lifestyle Corporation

Lisa Fordyce is Chief Operating Officer of Senior Lifestyle. She is responsible for leading the overall operational business strategies and care initiatives for over 170 communities in 26 states. In this role, Lisa manages the implementation of the company's policies and goals that cover operations, marketing and sales, personnel, and financial performance. She leads the day-to-day execution of strategies developed along with the other members of senior management to ensure each of the community leadership teams are delivering best-in-class services and care. Lisa has several decades of experience in the seniors housing industry. She is a results driven leader committed to pursuing innovation with integrity and empathy to grow both herself and Senior Lifestyle. Prior to her current role, she served as Senior Vice President of Operations of Senior Lifestyle. Prior to joining Senior Lifestyle, Lisa was Vice President of Operations at Emeritus Senior Living. In this capacity she led the Midwest Division of 14 states and more than 60 communities for nearly a decade. Lisa began her career as a caregiver and became a nurse shortly thereafter. She worked at ARV Assisted Living as a Senior Regional Director of Operations and Nursing for nearly seven years. Lisa has served in nursing positions in Assisted Living, Intermediate, and Skilled facilities. Lisa is a Licensed Practical Nurse (LPN), a member of the Ohio Assisted Living Association's Board of Trustees, and is a member of the Argentum COO/SVP of Operations Executive Roundtable.



### **Robert Gawronski**

#### **Vice President of Development & Acquisitions**



#### Senior Lifestyle Corporation

Since joining Senior Lifestyle Corporation ("SLC") in 1994, Mr. Gawronski has overseen the site selection, financing, and development of 24 affordable seniors housing developments (known as "Senior Suites") in various City of Chicago neighborhoods and suburbs and two Supportive Living Facilities providing affordable housing with assisted living services to seniors in the south suburbs of Chicago. To date, these initial 26 affordable housing developments represent more than \$357 million in total development costs and the creation of 2,327 affordable apartments for Chicago area senior citizens. Utilizing Low Income Housing Tax Credits with a variety of other public and private funding sources and subsidies, these communities are able to provide high quality housing with specially designed amenities and a variety of personal services appealing to the needs and desires of senior citizens with lower incomes. In addition to overseeing SLC's affordable seniors housing program, Mr. Gawronski continues to work on various market rate development opportunities for SLC and its joint venture partners. To date, he has been involved in SLC's acquisition and financing of more than \$330 million of existing real estate assets and nearly \$273 million worth of completed market rate seniors housing developments throughout the country. Mr. Gawronski currently serves on the Board of Directors for the Affordable Assisted Living Coalition. He also serves on the Board of Directors for New Horizon Center for the Developmentally Disabled.



#### Rob Gillette

##### Chief Operating Officer

American House

In 1997, Mr. Gillette joined American House Senior Living Communities as an assistant manager. Today serves as the company's chief operating officer. He oversees the operations of over 40 communities in the Midwest and Florida, maintaining a resident occupancy rate of above 90 percent. Prior to joining American House Senior Living Communities, Mr. Gillette worked with City Management in Detroit as a sales and marketing representative. Additionally, he founded Republic Personal Services, Inc. serving as the chief executive officer. Mr. Gillette has participated in Governor Jennifer Granholm's Long Term Care Task Force to rewrite Medicaid Laws, participated in Governor John Engler's and the Michigan Department of Consumer and Industry Services Assisted Living Task Force. He has served as the Vice Chair of Legislative Regulatory and Rental Housing Committee for National Association of Home Builders and on the Statewide Living Independent Council. Additionally, Mr. Gillette is a Board Member of Hospice of Michigan, Wayne State University Institute of Gerontology, Detroit Historical Society and American Seniors Housing Association, and is a committee member of the Community Engagement Committee at the Detroit Symphony Orchestra. He was also a founding Board Member of the Michigan Center for Assisted Living. Mr. Gillette currently resides in Beverly Hills with his wife and two daughters.



#### Jason Greis

##### Partner

McGuireWoods

Jason regularly represents a variety of dialysis and nephrology providers, vascular access center operators and owners, academic medical centers, physician group practices, skilled nursing facilities, inpatient rehabilitation facilities, long term acute care hospitals, laboratory companies, healthcare information technology companies and other healthcare providers in structuring mergers and acquisitions, joint ventures, accountable care and capitated care arrangements, syndications, divestitures and private placements implicating various regulatory compliance issues commonly associated with such transactions. Jason regularly provides guidance on physician self-referral prohibitions and antikickback issues, the corporate practice of medicine, post-acute regulatory issues, fee splitting, false claims act matters, provider licensing, changes of ownership and control, acquiring certificates of need, physician employment and recruitment, compliance with The Joint Commission and other accreditation standards, hospital and medical staff bylaws and other regulatory compliance issues. Jason is the President-Elect of the Illinois Association of Healthcare Attorneys and authors a newsletter and blog entitled, Greis Guide to LTACHs addressing issues of importance to long-term acute care hospitals. Jason has also served as the editor-in-chief of Health Care Law Monthly, a LexisNexis publication.



#### Stephanie Handelson

##### President & COO

Benchmark Senior Living

Stephanie Handelson is the President and COO of Benchmark Senior Living. She joined the company in April 2009 as Chief Operating Officer. Prior to joining Benchmark, she had a long and successful career with a large national senior living provider where she served as the Senior Vice President of East Coast Operations responsible for over 200 communities along the East Coast. Her experience in the senior living industry has always included a three-pronged approach to people, product and profit. She has successfully managed start-ups, turnarounds, acquisitions, and new product development. With an eye always focused on the people, Stephanie maintains a strong commitment to cultivating talent within the industry, insuring increased organizational capability through engaged, passionate, and skilled teams. With a strong background in the service and hospitality industry, Stephanie received her MBA from Dowling College in Oakdale, New York and her Bachelor of Professional Studies, Hospitality Management from the New York Institute of Technology in Westbury, New York. She is on the Board of Advisors of Benchmark Senior Living, as well as a member of the National Investment Center for the Seniors Housing & Care Industry (NIC) Operator Advisory Board. Recognized as a strong industry leader, Stephanie is on the Board of Argentum and American Seniors Housing Association (ASHA) as well as Chair of Argentum's Public Policy Committee and Argentum's Governance Committee.





**Jill Haselman**

**CEO**

Senior Living NOI

Jill Haselman is Founder and CEO of Senior Living Net Operating Impact™ (SLNOI™), a company focused on rapidly driving operating results through a unique culture and values process unlike any other in the industry. Her proprietary Impact™ process transforms teams from ordinary day-to-day managers into urgently-focused, critical thinkers who deliver immediate financial results in 72 hours. Impact™ drives data analysis of the whole 'system' with core values all tied together into an accountability system measured with key performance indicators [KPI's]. Jill's company increases occupancy in record time, mobilizes teams with urgency, and delivers extraordinary NOI results. The company was formed to fill a gap in the industry's access to strong leadership and values-based operating results. Ms. Haselman's leadership strategy is rooted in leveraging people + process + culture and layering it with urgency to act vs. plan. Her core passion is developing people and mobilizing the front line to think and act like owners, thus flipping the proverbial org chart upside down and focusing operations on the people that are closest to the customer. She is committed to helping the industry realize the critical importance of talent on the bottom line. After recognizing the industry trend of 'talent apathy', she and her team have completed research for a groundbreaking senior living specific hiring assessment. Through statistically valid and reliable research and measuring motivations of those among the industry's top 20% front line employees, her company introduced HIREImpact™ in May 2014. Jill's 15+ years of industry leadership experience in operations and organizational development, advocacy, and personal commitment to values-based best-in-class business have resulted in the establishment of the company and a line of services and products. Her leadership track record and ongoing commitment to measurable results-through-people are the backbone of Senior Living Net Operating Impact™. Prior to launching SLNOI™, Jill was Senior Vice President of Organizational Effectiveness at Benchmark Senior Living, a dominant provider based in New England with 46+ communities.



**Adam Heavenrich**

**Managing Director**

Heavenrich & Company

Adam Heavenrich is managing director of Heavenrich & Company, a boutique investment bank serving independent living, assisted living, skilled nursing and Alzheimer organizations nationwide. Since 1994, Heavenrich & Company has advised public and privately held for-profit and non-profit senior housing organizations in mergers, acquisitions and financing. With offices in Chicago and Denver, Heavenrich & Company offers integrity of advice, breadth and depth of industry contacts and quality of execution. Heavenrich has closed over \$1 billion in transactions. Adam is a longtime healthcare transaction and finance professional with over thirty years of experience in development, structuring, selling, acquiring, and underwriting senior living, healthcare and real estate projects. Heavenrich & Company has a dedicated equity arm of more than \$100 million for new construction of senior housing facilities. In addition to dozens of hospital based medical office facilities, he has been involved in the development of skilled, post-acute and assisted living facilities. He is currently developing the Symphony City Centre – Post Acute Rehabilitation facility located in the Illinois Medical District. This high profile project will be part of a \$300 million development in the heart of the IMD which is anchored by four world class hospitals; Rush University Medical Center, The University of Illinois Hospital, John H. Stroger Hospital (Cook County) and Jesse Brown VA Medical Center. Adam's articles have appeared in major senior living and healthcare publications including Nursing Homes Magazine, Assisted Living Today, and the American College of Physicians Observer. Prior to founding Heavenrich & Company, Adam was senior underwriter for real estate lending at the U.S. unit of Sanwa Bank, then the world's fifth-largest bank. Prior to Sanwa, he held positions with Shearson Lehman's real estate investment banking subsidiary. He began his career as director of sales and real estate development for a New York Stock Exchange-listed healthcare real estate development company. This company specialized in developing hospital based medical buildings that included surgery centers, imaging and laboratory. These buildings were typically formed as joint ventures between the hospitals and the physicians. Adam earned a Diploma from the London School of Economics and his M.B.A. in finance and marketing from Northwestern University's Kellogg Graduate School of Management.



**Dan Hermann**

**Sr. Managing Director**

Ziegler Investment Banking

Daniel Hermann joined Ziegler in 1987. He has recently been named as head of Ziegler's investment banking practice and a member of the Board of Directors. During his tenure has become a leading investment banker in the senior living industry. He has far-ranging experience in the management, structuring and financial analysis of every type of senior living financing. Dan is directly responsible for managing Ziegler's senior living finance offices nationwide. In his 25 years with Ziegler, Dan has structured and managed more than 185 senior living financings exceeding \$5.0 billion. He has utilized his expertise to create financing structures for a large clientele — from stand-alone nursing homes to multi-facility, multi-state systems, including start-up campuses and campuses undergoing major renovation projects. His particular emphasis in recent years has been to provide resources for key decision-makers in an organization to effectuate sound financial and strategic planning initiatives. To that end, Dan has assisted numerous multi-facility systems in their corporate planning efforts. When appropriate, he assists these and other organizations in the structuring of their financings and has developed financing alternatives using the broadest range of financing structures available to maximize yields and flexibility for his clients: traditional fixed rate issues, credit enhanced variable rate structures, extendable rate unenhanced issues, derivative applications, and off-balance sheet financings. Prior to joining Ziegler, he worked for a "Big Four" public accounting firm. Dan received a B.S. in finance and accounting from Illinois State University, Normal, Illinois, and an M.B.A. with an emphasis in health services management from Kellogg Graduate School of Management at Northwestern University, Evanston, Illinois. He is a Certified Public Accountant and frequent lecturer. In October 2005, Dan was named to the Contemporary Long Term Care 2005 CLTC Power & Influence Top 25 listing, the magazine's selection of today's decision makers "who hold the reins and help shape the path" for senior living. He

has lectured at Harvard and internationally on senior living finance (its historical trends, strategic positioning issues, growth potential and other), served as a member of the CARF-Continuing Care Accreditation Commission's Financial Advisory Panel.



**Justin Hutchens**

**EVP & Chief Investment Officer, Senior Housing and Care**  
HCP, Inc.

J. Justin Hutchens is Executive Vice President and Chief Investment Officer – Senior Housing and Care of HCP, Inc. (NYSE: HCP). Prior to joining HCP in September 2015, he served as President and Chief Executive Officer of National Health Investors, Inc. (NYSE: NHI) since March 2011 and President and Chief Operating Officer ("COO") since February 2009. He has national operating experience as the Senior Vice President and COO of Summerville Senior Living from 2003 to 2007 and upon merger, the Executive Vice President and COO of Emeritus Senior Living (NYSE: ESC) from 2007 to 2009. From 1997 to 2003, Mr. Hutchens held multi-site management roles overseeing marketing and operations in the senior housing and post-acute industries. Mr. Hutchens holds a Master of Science in Management from Regis University and a Bachelor of Science in Human Services from the University of Northern Colorado. He was awarded Executive Certificates in Measurement and Control of Organizational Performance from the University of Michigan, and Strategy and Innovation from the MIT Sloan School of Management.



**Bob Karn**

**Executive Vice President & CFO**  
Allegro Senior Living

Mr. Karn is a Certified Public Accountant with public accounting experience as an audit manager with Arthur Andersen in their real estate division. He also served clients in the high-tech, financial services, health care and manufacturing industries and has extensive experience with private equity transactions and public securities offerings. He is responsible for the company's finance, accounting, and information technology functions. Mr. Karn obtained his Bachelor of Arts degree in Economics from Vanderbilt University and a Master of Business Administration from Washington University.



**Dr. Jacquelyn Kung**

**Co-Founder Clear Care**  
Board Chair at Family Caregiver Alliance

Dr. Jacquelyn Kung is an entrepreneur, consultant, and thought leader in senior living and care. She cofounded ClearCare and grew it to be the market share leader in post-acute care systems, serving 250,000 seniors in 50 states each year. While at McKinsey, she helped Fortune 500 companies define and shape their senior care strategies. Previously, Dr. Kung managed a 2,100-resident CCRC (life plan community) and led corporate strategy for Erickson Living. With a Harvard BA and MBA and Hopkins PhD, she served on adjunct faculty at Brown Medical School and now chairs the Board of Family Caregiver Alliance. Dr. Kung lives in San Francisco with her husband Matt and daughter Macallan.



**Patrick McCormick**

**President**  
Plante Moran Living Forward

Pat leads Plante Moran Living Forward™, a team of experienced professionals dedicated to providing value-driven senior living consulting in the areas of feasibility, site selection, and development. Pat has over 23 years of healthcare industry experience and has spent his entire career in the senior care and living industry. He has extensive experience in feasibility projects and market studies, Medicaid and Medicare reimbursement, as well as mergers and acquisitions. Pat's known for his healthcare expertise and practical approach for new developments, facility repositioning's, and turnaround projects. He specializes in advising his clients in staying abreast of service delivery changes and industry best practices. Most recently, Pat's focus has been on facilitating strategic planning sessions for a number of organizations. This has led to home health and hospice expansion, facility repositionings, merger and acquisitions, and facility debt restructuring. He is intimately involved in feasibility studies used in raising capital for senior living organizations.



**Joe McElwee**

**Principal — Development**  
Capital Seniors Housing

Joe McElwee is responsible for managing CSH's development and renovation projects from the planning stages to completion. Mr. McElwee co-founded Shelbourne Healthcare Development Group and has over 20 years of experience in the senior assisted living industry. He was the Senior Vice President of Development for Sunrise Senior Living in McLean, Virginia, managing development officers in Chicago, Detroit, Boston, Baltimore and New York. In addition, he has worked for JS Hovnanian and Sons of Mount Laurel, New Jersey. Mr. McElwee has been a guest lecturer at the Erickson School of Aging in Maryland and at Marquette University in Milwaukee. He is currently serving as a board member for the Marquette University Center for Real Estate. Mr. McElwee is a graduate of Marquette University.



**Allen McMurtry**

**Executive Managing Director**

**Cushman & Wakefield**

Allen McMurtry is responsible for the origination and execution of senior housing sales nationally for Cushman & Wakefield. With 29 years of experience in Senior Housing brokerage, Allen has sold 165 communities throughout the country with an aggregate value of over \$2 billion.

**Matt Monson****Vice President of Acquisitions and Business Development**

Mainstreet

Matt Monson is the vice president of acquisitions and business development at Mainstreet. He is responsible for evaluating, structuring and closing Mainstreet's new investments. Prior to joining Mainstreet, Mr. Monson was a director at Health Care REIT, Inc., where he was responsible for new investments in seniors housing and medical office assets. He was also responsible for overseeing the financial and operating performance of key operator relationships, as well as medical office dispositions. Mr. Monson holds an MBA from the Johnson School of Management at Cornell University, a master's in real estate from Cornell University and a bachelor's from Brigham Young University (BYU). He currently sits on BYU's construction management advisory board and is an active member of the real estate council at Cornell's Baker Program in Real Estate.

**Gale Morgan****VP Sales**

Mather Lifeways

Gale is responsible for the coordination and oversight of sales and occupancy efforts for Mather LifeWays senior residences. Gale has also been instrumental in creating industry-specific customer service training programs with Mather LifeWays Institute on Aging, adapted by 422 organizations. Gale has more than 30 years of experience in the senior living industry. Prior to joining Mather LifeWays in 2005, she previously served as Assistant Vice President of Sales and Marketing/Training for Classic Residence by Hyatt, where she was responsible for sales and marketing of seven communities, including four Continuing Care Retirement Community start-ups. She also served as Vice President of Sales and Marketing for Retirement Community Specialists (RCS) and Retirement Living Affiliates. Gale earned her Bachelor of Business Administration Degree in Marketing from the University of Phoenix.

**Mark Myers****Executive Director**

Institutional Property Advisors

Mark Myers is an Executive Director of Institutional Property Advisors (IPA). He has more than 20 years of real estate experience specializing in seniors housing property sales. Mr. Myers and his team have closed over \$4 billion in seniors housing transactions across 44 states, representing government entities, private investors, institutional clients and seniors housing operators in the disposition of their seniors housing facilities and portfolios nationwide. Since Mr. Myers joined the firm, he has consistently been one of its top brokers, receiving many prestigious awards, including top ten agent of the year on four occasions. He was also inducted into the Midwest Real Estate Hall of Fame in 2012. Mr. Myers received a Bachelor of Arts degree in economics from Wheaton College in 1983 and an MBA from Northwestern University Kellogg School of Business in 1991.

**Talya Nevo-Hacohen****Chief Investment Officer**

Sabra Healthcare REIT

Talya Nevo-Hacohen. Ms. Nevo-Hacohen has served as Sabra's Executive Vice President, Chief Investment Officer and Treasurer since November 2010. From September 2006 to August 2008 and from February 2009 to November 2010, Ms. Nevo-Hacohen served as an advisor to private real estate developers and operators regarding property acquisitions and dispositions, corporate capitalization, and equity and debt capital raising. From August 2008 to February 2009, Ms. Nevo-Hacohen was a Managing Director with Cerberus Real Estate Capital Management, LLC, an affiliate of Cerberus Capital Management, L.P., a private investment firm. From 2003 to 2006, Ms. Nevo-Hacohen served as Senior Vice President—Capital Markets and Treasurer for HCP, Inc., a healthcare REIT. Previously, from 1993 to 2003, Ms. Nevo-Hacohen worked for Goldman, Sachs & Co. where she was a Vice President in the investment banking and finance, and operations and administration divisions. Prior to her affiliation with Goldman Sachs, she practiced architecture and was associated with several architectural firms in New York.

**Meg Ostrom****Vice President of Sales and Marketing**

Enlivant

Ms. Ostrom is responsible for providing strategic vision and oversight of the company's revenue growth and sustainability through innovative sales leadership, multi-channel marketing, and brand building. Before joining Enlivant, Ms. Ostrom was Senior Vice President of Sales and Marketing at Vi, a high-end senior housing owner and operator. In this role, Ms. Ostrom drove revenue growth through strategic lead generation and conversion initiatives, led the successful rebranding of the company and collaborated with the executive team to institute substantial cultural change in the organization. Ms. Ostrom has



company and collaborated with the executive team to initiate substantial career change in the organization. Mr. Cohen has also held senior leadership roles in general management and marketing with several retail companies, including Sears, Roebuck and Co., where she led three business units as Vice President/General Merchandise Manager.



### **Alan Plush**

#### **President/Senior Partner**

HealthTrust, LLC

Mr. Plush specializes exclusively in Healthcare and Retirement valuation throughout the United States. He is currently President and Senior Partner of HealthTrust, LLC following its spin-off from PricewaterhouseCoopers, where he was the national director of the Healthcare Valuation group for over three years. Prior to this, Mr. Plush was the owner and president of Gulf/Atlantic Valuation Services, Inc., which was purchased by PricewaterhouseCoopers in August 1999. HealthTrust operates from five locations in the U.S and Canada. (Sarasota, Birmingham, Boston, Los Angeles and Toronto). In 1986, Mr. Plush began specializing in the appraisal of a large number of healthcare properties. With a foundation in the appraisal of adult congregate living facilities and nursing homes, his specialized expertise has grown substantially. The company was created to satisfy the increasing demand for reliable and well-documented healthcare/retirement valuations, market studies and feasibility reports. To date, he has directly or indirectly participated in the appraisal of approximately 6,000 nursing homes, 4,500 congregate care facilities, an additional 1,000 continuing care retirement centers, and over 200 hospitals throughout 48 states in the United States. HealthTrust serves a variety of national clients in the industry, including the most noted lenders, operators and developers. Mr. Plush is the founding member of NMMC (National Medicaid/Medicare Conference) that has since been gifted to NIC. In addition to this, Mr. Plush is a regular speaker at conferences such as NIC (National Investment Center), ALFA (Assisted Living Federation), ASHA (America Seniors Housing Association) and other industry venues. Mr. Plush is active as an investor in the industry with several debt/equity funds and is Principal in several development projects. Publications of note include the Assisted Living Absorption Study, the Annual Transaction Study with ASHA, the State of Seniors Housing with NIC and ASHA, and the 2005 CCRC Profile with AAHSA.



### **John Rijos**

#### **Co-Founder/Operating Partner**

Chicago Pacific Founders

John P. Rijos is a Co-Founder/Operating Partner of Chicago Pacific Founders, a private equity firm that specializes in investments across the healthcare spectrum with offices in Chicago and San Francisco. He is also Chairman and Chief Executive Officer of CPF Living, their seniors housing subsidiary. Prior to that, Mr. Rijos spent thirteen years as Co-President and Chief Operating Officer of Brookdale Senior Living, Inc., the largest senior living company in the United States. During his tenure, the company grew from 22 communities to approximately 650 communities in 36 states with more than 67,000 units and 46,000 associates who serve residents in independent living, assisted living, memory care, skilled nursing and large campus continuous care retirement communities. Prior to Brookdale, Mr. Rijos spent sixteen years as President and Chief Operating Officer of Lane Hospitality, which owns and operates more than 40 hotels and resorts. During that time, he spent three years as Chairman of ITT Sheraton's Owners Association, and two years on the board of the International Association of Holiday Inns Owners. Before Lane, he served as President and Chief Operating Officer of High Country Corporation, a Denver-based hotel development and management company. During his distinguished career, Mr. Rijos has served on numerous boards and advisory committees in senior living, hospitality, and universities. He is a member of the American Seniors Housing Association and is past Chairman of the Executive Committee. He received his Bachelor of Science degree from Cornell University in hotel administration, graduating with distinction. He also has a Certified Hospitality Administrator designation. He has served a multi-year term on the Cornell University Council and is presently on the Dean's Advisory Board for their School of Hotel Administration, where he is a Lecturer and was Executive-in Residence for the 2013-2014 academic year. He was just recently named to the Board of Cornell's Institute for Healthy Futures.



### **Brian Robinson**

#### **Senior Vice President**

MB Financial Bank

Brian J. Robinson is a Senior Vice President of the Commercial Banking – Healthcare department at MB Financial Bank. He is responsible for maintaining the existing portfolio and originating business in the healthcare space. Mr. Robinson builds on MB's substantial history with nursing home operators in Illinois and has since diversified the portfolio into various areas in the healthcare space nationally. Mr. Robinson joined MB Financial Bank in 2010 and has twenty years of experience in financial services. Previously, he served as a Vice President of Global Markets for Bank of Ireland and was a Vice President and Relationship Manager at LaSalle Bank. He holds his Master of Business Administration in Management from DePaul University and his Bachelor of Arts in Finance from John Carroll University.



### **Joshua Rosen**

#### **SVP/Team Leader, Originations**

Capital One Commercial Banking

Joshua Rosen leads the seniors housing and healthcare practice at Capital One Commercial Banking. He brings more than 16 years of industry experience to this post, both in healthcare and multifamily finance, and is based in the company's Chicago office. Mr. Rosen has been involved in over \$1 billion worth of transactions throughout his career and is a frequent speaker at industry events nationwide. Formerly executive vice president and branch manager for Oppenheimer Multifamily Housing and Healthcare Finance, Rosen closed the largest SNE portfolio in the company's history. Earlier, as a vice president at Canmark

healthcare finance, Rosen closed the largest SNF portfolio in the company's history. Earlier, as a vice president at Capmark Finance, he closed the company's first two LEAN transactions. Mr. Rosen began his career at Cambridge Realty Capital, where he was primarily responsible for originating and processing the firm's senior housing pipeline.



### **Avi Rothner**

#### **President**

Altitude Health Services

Avi Rothner founded Altitude Health Services, Inc., a leading healthcare company that provides a broad spectrum of consulting and support services to skilled nursing facilities in 2011. Altitude directly services over a thousand beds with a strategic mission to provide a higher level of caring. Over the last number of years he also built his family's leased nursing home portfolio, moving away from leasing facilities on a one-off, distressed basis. He created a purpose-built private REIT to acquire facilities specifically for third party leases. Today, that portfolio numbers nearly thirty assets providing annual rental income in excess of twenty million dollars with a focus on positioning newer operators in the SNF business. Mr. Rothner has broad transactional experience, having directed purchases in ten states of nearly fifty facilities totaling over three hundred million dollars. He has successfully executed deals with all manner of sellers including mom and pops, regional and super regional operators, nonprofits, governments, REITs, and other publicly traded healthcare companies. Mr. Rothner has successfully managed over half a billion dollars of financings with twenty-plus financial institutions. Rothner was originally lured into the healthcare field by his father over a decade ago. He began his career in New York working for investment companies with a focus on analysis and acquisition of value-add and distressed investments. Rothner has been sought out as a speaker for Senior Care Investor, Marcus & Millichap, and Seniors Housing Business with a focus on Post-Acute transactions and valuation. He currently serves on several community boards and acts as an advisor on policy and fundraising. He graduated from New York University with a double major in economics and political science with a minor in dramatic literature. Rothner lives with his wife and four children in the Chicago area.



### **Ryan Saul**

#### **Managing Director**

Senior Living Investment Brokerage

Ryan Saul is Managing Director at Senior Living Investment Brokerage, Inc. Specializing in the sale of Seniors Housing since 2000, Ryan is recognized as a leading broker in the industry, having completed over 250 transactions across 30 states. He specializes in private, public and not-for-profit representation. Under his guidance, Ryan has helped build a successful team with total transaction volume in excess of \$3.0 billion across all types of Seniors Housing communities including skilled nursing, assisted living, independent living and continuing care retirement communities. Senior Living Investment Brokerage, Inc. is a leading brokerage firm dedicated to representing Sellers in the confidential sale of Seniors Housing communities. Ryan resides in Batavia, Illinois, with his wife Brenda and their three children: Charlie, Henry and Sadie.



### **Isaac Scott**

#### **Principal**

Anthem Memory Care

Isaac Scott is a founding principal and the community development lead at Anthem Memory Care. Blending expertise in strategic planning, site selection and real estate finance, his proprietary research methodology identifies underserved markets where Anthem can effectively serve a need for Alzheimer's and dementia care. While at Pacific Santa Fe, an original investor in Anthem before it was independently established, Isaac led market analysis and business planning that led to the creation of Anthem. As part of the executive leadership team, he continues to direct the company's day-to-day internal and external growth. Earlier in his career, Isaac held management positions at Time Warner, where he was a top sales performer for FORTUNE and Sports Illustrated brands, brokered strategic brand initiatives for FORTUNE 100 companies including Oracle Corp., and played a key role in content creation for FORTUNE Global Forum, one of the most exclusive international gatherings of global business and political leaders. Prior work experience includes time with adidas America and Nike. Isaac earned a BA from the University of Oregon and a master's certificate in real estate development from Portland State University. He is a founding board member of the Portland Alternative Investment Association, and an Ironman Triathlon competitor.



### **Jim Sherman**

#### **SVP**

Dougherty & Company LLC

Mr. Sherman joined Dougherty Mortgage, LLC in August, 2015. He has more than 40 years' experience in the seniors housing and health care industry, and is an expert in providing financing and financial advisory services in seniors housing, long term care, and health care finance. Beginning in the early 1970's he worked as a Certified Public Accountant advising health care, long term care, and seniors housing clients on accounting issues, third party reimbursement issues, and real estate and corporate finance issues. He has experience in health care and seniors housing in both the public and private sectors. During his career, he has advised clients and completed financings totaling billions of dollars. These financings include conventional bank debt for new construction and acquisitions, bond financings, taxable and tax-exempt financings, Fannie Mae, and FHA guaranteed financings. Prior to joining Dougherty Mortgage, LLC, for three years, Mr. Sherman served as an Executive Vice President, Capital One Bank, N. A. and prior to Capital One, for twelve years, he served as the Senior Managing Director, Red Capital Group, LLC, responsible for the Seniors Housing and Long Term Care division. Mr. Sherman also served as the President and Chief Executive Officer at Churchill Estates, Inc., an assisted living owner and operator. Mr. Sherman's began his career working and consulting with seniors housing and health care clients during his tenure at the National Healthcare and Public



serving and consulting with seniors housing and health care clients during his tenure as the National Healthcare and Public Finance Partner at Laventhol & Horwath. Mr. Sherman is a graduate of Macalester College and received his Certified Public Accountant certificate. He is a recognized leader in the seniors housing industry, having presented at many seminars and seniors housing seminars, and serving on the boards of many professional organizations.



### **Joe Solari**

#### **Vice President — Corporate Development**

Capital Senior Living

Joseph Solari has been Vice President - Corporate Development for Capital Senior Living Corp. since September 2010. Mr. Solari is responsible for initiating and executing the acquisition of seniors housing communities for the Company. Since joining the Company, Mr. Solari has successfully led the completion of 37 acquisitions comprising 57 communities and \$800 million in aggregate transaction value. Mr. Solari has more than 20 years of experience originating, structuring, negotiating and executing the acquisition, sale and divestiture of healthcare real estate and real estate operating companies. Prior to joining Capital Senior Living, from 2007 to 2009, Mr. Solari was Managing Director, Acquisitions for Ventas, Inc., where he was responsible for the firm's real estate investment activities in the seniors housing and skilled nursing industries. Prior to Ventas, Inc., from 1999 to 2007, Mr. Solari spent eight years in the healthcare investment banking group of Houlihan Lokey, where he was responsible for the origination and execution of merger and acquisition, private placement and financial restructuring engagements for the firm's healthcare clients, with particular focus on facility-based, healthcare services companies.



### **Mike Taylor**

#### **Senior VP — Group Manager Healthcare Lending**

First Midwest Bank

Mike Taylor, Head of the Healthcare Lending Division at First Midwest Bank, is responsible for growing existing client relationships, as well as the Healthcare Lending platform in the Midwest. He is charged with leading the lending team that serves the non-profit and for-profit hospital, senior living, and service sectors of healthcare throughout the Midwest and nation-wide. Prior to joining First Midwest Bank, Mike spent 9 years as an investment banker specializing in healthcare finance at Ziegler. While at Ziegler, he worked on over \$2.5 billion worth of taxable and tax-exempt financings for national borrowers. He is experienced in structuring and sizing new construction or start-up projects, repositioning or redevelopment projects, expansions of existing campuses, refinancing of existing debt, and sizing alternative capital structures. Mike is a graduate of the University of Illinois Urbana-Champaign and holds undergraduate degrees in Finance and Speech Communications, a Master's Degree in Labor and Industrial Relations, as well as an MBA with a focus on Finance. In addition, Mike holds Series 7 and Series 63 licenses. He currently serves on the University of Illinois College of Liberal Arts and Sciences Alumni Association Board, where he is a member of the finance committee and the chair of the black tie planning committee.



### **David Watkins**

#### **Partner**

SHA Capital Partners

David formed SHA Capital Partners, a real estate investment advisory firm devoted to the senior housing industry. The firm combines institutional real estate investment processes with deep senior housing experience and expertise. He is responsible for raising capital, sourcing transactions, and building the team. Prior to creating SHA Capital Partners, David brought Heitman, a \$35 billion real estate investment advisory firm, into the senior housing industry. The firm invested \$600 million in senior housing. David directed the European and Asian investment research teams for Heitman. He sat on the firm's international investment committee (and had a veto vote), which approved \$5 billion of transaction activity during his tenure. Prior to joining Heitman, David worked as a real estate investment consultant with DEWatkins, Ltd., and PricewaterhouseCoopers. Prior to that, he was a pension investment consultant at Ennis, Knupp & Associates. David's research has appeared in numerous journals, including Investment Policy, Financial Analysts Journal, Real Estate Issues and Journal of Real Estate Research. He has also spoken at industry conferences, including ERES, ARES, NCREIF, NAREIM, NIC and RERI. He earned a BA from Amherst College (with honors) and an MBA in Finance and Statistics from the University of Chicago. He earned the CFA designation in 1992, is a member of the CFA Institute, and a Fellow of the Homer Hoyt Institute. He was a member of the Advisory Board of the Real Estate Research Institute from 2007-2013. He is a member of the Board of Directors of the National Investment Center for the Seniors Housing and Care Industry and chairs its research committee. He is on the Editorial Board of InvestigAge, a Mather Lifeways publication.

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