



DOWNLOAD THE ULI EVENTS APP – FALL MEETING

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Senior Housing Council Agenda
2014 ULI Fall Meeting
New York

| | | | |
|------------------------|------------------|---------------------|---|
| Chair: | Margaret Wylde | Phone: 800-201-1483 | Email: mawylde@promatura.com |
| Assistant Chair: | Chris Kazantis | Phone: 617-261-9360 | Email: ckazanti@aew.com |
| Membership Vice Chair: | Matthew Phillips | Phone: 847-480-0700 | Email: mphillips@seniorlifestyle.com |
| Vice Chair: | Paul Johnson | Phone: 949-240-3363 | Email: pjohnson@ranchomv.com |
| Vice Chair: | Aaron Conley | Phone: 864-420-9873 | Email: waconley@thirdactsolutions.com |

Property Tour– October 21st 2014

Departing Time: Meet in the lobby of Le Parker Meridien at 2:00pm sharp

Transportation: Subway. Leave as a group from Le Parker Meridien and take subway to West 86.

Tour Time: 2:30pm-4:30pm

West 86
333 West 86th Street
New York, NY 10024

RSVP contact: Heather Houghton Phone: 662-234-0158 xt. 0461 Email: admin@promatura.com

Private Cocktail Reception @ The Carnegie Club– October 21st 2014

Private Event Sponsored By: [Epcon Communities](#), [Walsh Construction](#), [Rancho Mission Viejo](#), [Erickson Living](#), [Red Mortgage Capital](#), and [Crown Advisors](#)

Location: The Carnegie Club
Address: 156 West 56th Street, New York, NY 10019
Time: 6:30pm – 9:30pm
Transportation: Own your own, within walking distance of Le Parker Meridien

RSVP contact and cost: Heather Houghton Phone: 662-234-0158 xt. 0461 Email: admin@promatura.com

Guest/spouse: \$150

SHC members: Dinner fees are included in the ULI invoice with your council dues. If you would like to bring a guest/spouse the cost is \$150. Instructions for sending payment in reception invitation email.

Council Day Agenda – October 22nd 2014
Millennium Broadway Hotel (Room 3.11), 145 West 44th Street

- 8:00am-8:30am **Networking Breakfast**
- 8:30am-8:45am **Chair’s Welcoming Remarks/Introductions/General Announcements/Business Session**
- Introduction of New Members and Guests
 - Reminder to Complete Attendance Sheet
 - Reminder to Complete Evaluation Form
 - ULIF Announcement
 - Review of ULI Priorities & Council Member Expectations (see back page of your agenda)
 - Discussion re: Suggestions for Future Council and Concurrent Meeting Programs
 - Announce Next Meeting:
 - ULI Spring Meeting – Houston, TX
 - Receptions on Wednesday May 13th, 2015
 - Council Meetings on Thursday May 14th, 2015
- 8:45am-9:30am **Industry Updates**
- | | |
|---|---|
| <p>Speaker: Chuck Harry (m) (c) Title: Managing Director and Director of Research & Analytics Company: NIC City, State: Annapolis, MD</p> | <p>Speaker: Beth Mace (m) (c) Title: Director of Capital Markets Outreach Company: NIC City, State: Annapolis, MD</p> |
|---|---|
- 9:30am-10:15am **Silent Generation -Understanding Today’s Independent and Assisted Living Resident Through the Spectrum of Their Lives**
- Speaker:** Kelly Cook Andress (nm) (c)
Title: President
Company: Sage Senior Living
City, State: Wallingford, PA
- 10:15am-10:30am **Break**
- 10:30am-11:30am **100 Maple Avenue, White Plains and Sierra Madre**
- | | |
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| <p>Speaker: Kathryn Burton Gray (m) (c) Title: Senior Managing Director Company: Red Mortgage Capital, LLC City, State: Dana Point, CA</p> | <p>Speaker: Dan Gorham (nm) (c) Title: Partner Company: Fountain Square Properties City, State: Reston, VA</p> |
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- 11:30am-1:00pm **Lunch**

1:00pm-2:00pm **What's New, What is Coming in 55+ Housing**

Moderator: Paul Johnson (m) (c)
Title: Senior Vice President
Company: Rancho Mission Viejo
City, State: San Juan Capistrano, CA

Speaker: Phil Fankhauser (m) (c)
Title: Principle
Company: Epcon Communities
City, State: Dublin, OH

Speaker: Nick Taratsas (nm) (c)
Title: Senior Vice President
Company: DMB Associates, Inc.
City, State: Scottsdale, AZ

2:00pm-3:45pm **90 Second Update / Wine reception**

3:45pm-4:00pm **Wrap-up and closing**

4:30-6:00 **Jacob K. Javits Convention Center**
General Session: Capital Markets: A Global Perspective
Capital users and providers from across the globe will engage in a provocative conversation on where the money is coming from and how it is being used.

Speakers:

Jeff T. Blau
Chief Executive Officer
Related Companies

Kok Huat Goh
Chief Operating Officer and President
GIC Real Estate

6:00-7:30 **Cocktail Reception, Jacob K. Javits Convention Center**

KEY:
(f)=Full Member
(m)=Member
(nm)=Nonmember
(i)=Invited Speaker/Moderator/Panelist
(p)=Proposed Speaker/Moderator/Panelist
(c)=Confirmed Speaker/Moderator/Panelist

For more information about ULI please visit www.uli.org

ULI's Priorities

1. Promoting Intelligent Densification and Urbanization

- What are the most responsible ways to provide cost-effective housing for a rapidly increasing global population that is becoming increasingly urbanized?
- How can we advance the understanding of the relationship between a high-quality of life and the built environment to create high-quality, appropriately-priced density that is attractive to users?
- What is the relationship between a thriving economy and a thriving city (and vice versa)-the relationship between a dynamic society and the built environment?

2. Creating Resilient Communities

- What are the best new business models in the real estate and land use industry and how can we support their development?
- How can we best adapt and reuse existing real estate while eliminating obsolete space to create thriving communities?
- How can we influence land use leaders locally and around the world as they reshape the process of community building and developing both social and physical infrastructure?

3. Understanding Demand and Market Forces

- How can we best understand the demand (quantity, type, price, and location of the need) for real estate and discover what the market wants short-term versus what the market needs long-term
- How can we help balance local, regional, national, and global interests as well as public and private interests in terms of how they affect land use decisions and development?
- How will changing technology influence building and buildings, and how will people's use of technology influence how they interact with the physical environment?

4. Connecting Capital and Real Estate Through Value

- How can we best generate value in the built environment that is greater than its cost?
- What are the best ways to ensure the attractiveness of real estate as an investment as institutional capital allocators continue to change and become more global?
- What is the most effective way to demonstrate and explain the relationship between investment in public projects and amenities and the impact on real estate value?

5. Integrating Energy, Resources, and Uses

- How can we best reduce the negative impact of the built environment on our natural resources and climate?
- What are the best ways to use the world's energy resources and protect the built environment from volatile and unpredictable conditions?
- How will trends in energy and resources impact the future best use of land?

Council membership is a privilege desired by many ULI members and the value of the Council experience is determined by the quality and participation of its members. Each Council member is therefore expected to be a committed and participating part of the Council, contributing as much value to the Council experience as they take home.

OPEN, HONEST, SPECIFIC INFORMATION AND EXPERIENCE: Come to Council meetings ready to participate openly and honestly with specific, detailed information and experience from your current real estate practice.

CONFIDENTIALITY: Everything discussed within a Council is kept completely confidential by all Council members. This is the foundation that makes open and honest sharing of detailed information and experience possible. Violation of confidentiality will result in immediate expulsion from your Council.

REAL DEALS, REAL NUMBERS: The key to truly valuable interaction between the Council members is the sharing of real deals and real number, successes as well as lesson learned.

RESPECT FOR OTHERS: Help make discussions productive and high value by engaging your fellow council members respectfully with your most relevant information and experience.

NO SELF PROMOTION: Councils members are all highly successful real estate professionals. Self promotion and pitching do not add value for your fellow council members. Keep your presentations and discussions aimed at delivering real take home value for your peers, not your business.

NO CELL PHONES OR BLACKBERRIES: It should go without saying that you cannot be fully engaged in your council while checking your email. Most Councils have breaks designed to allow members to check in and stay connected a few times during the day.

ATTEND EVERY MEETING AND ATTEND ALL DAY: Each Council member has been chosen for the value that their unique background and experience brings to the Council. Missing a Council meeting or part of a Council meeting reduces the value for every other member of your Council. Your empty seat could easily be filled by someone else who has value to bring to the table.

RECRUIT THE BEST AND BRIGHTEST: Council members often come into contact with new leaders in the industry, ULI members and non-ULI members, with exciting new products, ideas and best practices that will add greatly to the value of their Council. Bring these new leaders as guests to your Council, sponsor them for Council membership and work with your Council leadership to help them become future members of your Council.

PARTICIPATE IN ULI AND ULI LEADERSHIP: Council members are expected to be active participants in ULI's mission of providing leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. Your involvement in ULI provides excellent opportunities to network and to learn both within and beyond the boundaries of your industry segment:

- Attend and participate as speakers and panelists at ULI Spring Council Forums and Fall Meetings.
- Attend and participate as speakers and panelists at Council meetings.
- Serve as panelists at Project Analysis Sessions held at Spring Council Forums and Fall Meetings.
- Serve as panel members for Advisory Services assignments scheduled throughout the year.
- Contribute to ULI publications through the contribution of articles and papers.
- Contribute to the ULI Foundation.
- Participate as Committee/Subcommittee/Task Force members.
- Participate in research and education programs.
- Participate in District Council programs in each member's area.