

# Southern Municipal Finance Society

## Southern Profile: Reflection, Introspection, and Transformation



September 19th and 20th, 2019  
Gaylord Opryland Resort  
Nashville, Tennessee

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Valid for Continuing Education (CE) Credits: The SMFS will provide a sign-up sheet to track attendance and provide certificates for attendees to submit to governing bodies for CE credits

### REGISTRATION:

Registration is online at [www.nfma.org](http://www.nfma.org). Registration fees are as follows:

- \$395 - Early Bird Special (not valid after August 15, 2019)
- \$425 - NFMA Members
- \$475 - Non-members
- \$150 - Government and Not-for-Profit Employers
- Local College Students and Academic staff are free with registration prior to event

### CONFERENCE CANCELLATION POLICY:

Cancellations must be received in writing, via fax, mail or email, on or before September 1, 2019 at 5 PM EST, to qualify for a full refund. Cancellations received after that date will be entitled to a 50% refund. Substitution of an attendee is permitted at any time up to the first day for the conference, September 19, 2019.

### VENUE & HOTEL INFORMATION:

The conference will be held at the Gaylord Opryland Resort & Convention Center on September 19-20, 2019. The SMFS has secured a block of rooms at the Gaylord Opryland Resort & Convention Center at a rate of \$219 per night plus a daily resort fee of \$20 per night. Rooms are available at those rates until **Monday, August 19, 2019**. Contact the hotel as soon as possible to make your arrangements and mention the SMFS conference, or reserve online.

Book your group rate for SMFS-Southern Municipal Finance Society [CLICK HERE](#)

### TRANSPORTATION:

THE HOTEL OFFERS ROUNDTRIP AIRPORT SHUTTLE SERVICE for \$35.00 per person.

Gaylord Opryland Resort & Convention Center is located 10 minutes from Nashville International Airport.

## Day 1: Thursday, September 19, 2019

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7:30 – 8:00 a.m.	<b>Registration and Continental Breakfast</b>
8:00 – 8:15 a.m.	<b>Opening Remarks</b> – <i>Dennis Whittaker, Chair Southern Municipal Finance Society</i>
8:15 – 9:30 a.m.	<b>Key Note:</b> William R. Emmons, <i>Federal Reserve Bank of St. Louis</i> He is the lead economist with the Center for Household Financial Stability at the Federal Reserve Bank of St. Louis, where he also serves as assistant vice president. His work has been highlighted in major publications including The New York Times, The Wall Street Journal and American Banker, and he has appeared on PBS NewsHour, Bloomberg News and other national programs. Emmons received a Ph.D. in finance from the J.L. Kellogg Graduate School of Management at Northwestern University. He received his bachelor's and master's degrees from the University of Illinois at Urbana-Champaign.
9:30 – 10:45 a.m.	<b>Tax Incentives and Economic Development</b> Understanding the pros and cons of tax incentives for larger corporate investments provided by state and local governments. Understand how opportunity zones may affect investing and economic development decisions.  <i>Barbara VanScoy (Moderator), The FB Heron Foundation</i> <i>James Key-Wallace Executive Director; NH Business Finance Authority (invited)</i> <i>Brad Lambert, Deputy Secretary, Louisiana Economic Development (invited)</i> <i>Napoleon Wallace, Co-Founder, Activest; Former NC Deputy Secretary of Commerce</i>
10:45 – 11:15 a.m.	<b>Coffee &amp; Doughnut Break</b>
11:15 a.m. – 12:30 p.m.	<b>Addressing Housing Opportunities in High-Growth Communities</b> How state and local governments are using innovative ways to increase housing opportunities and decrease homelessness. Are there lessons learned from other fast growing places and volume cap challenges?  <i>Lorraine Palacio-Germain (Moderator), Managing Director, Ramirez &amp; Co.</i> <i>Mikiyon Alexander, Director, Fitch Ratings</i> <i>Trent Ridley, Chief Financial Officer, Tennessee Housing Development Agency</i> <i>Andrea Shields, Managing Director, Travis County (TX) Corporations</i> <i>Timothy E. Nelson, Managing Director, Hilltop Securities</i>
12:30 – 1:45 p.m.	<b>Luncheon</b>

*Join colleagues for engaging conversations. Each lunch table will have a focused conversation topic. Topics will include timely credit concerns, ESG factors, and pension overhangs. We welcome other suggestions.*

2:00 – 3:15 p.m.

**Water Infrastructure: Slow Growth/Rapid Growth and Dealing with Consent Decrees**

This panel will address issues facing fast growing and slow growing areas within southern regions and how they can afford to address consent decrees. Hear from the EPA on how they address the affordability issue when municipalities need to address regulations, but affordability arises as an issue.

*Suzanne Finnegan (Moderator), Chief Credit Officer, Build America Mutual  
Sonia Brubaker, Center Director, Environmental Protection Agency  
Doug Evanson, Chief Financial Officer, San Antonio Water System, TX  
Carl E. Geffken, City Administrator, Fort Smith, AR*

3:15 – 3:45 p.m.

**Afternoon Break**

3:45 – 5:00 p.m.

**Health Care**

Digging deeper in the divide, we look at rural and urban health providers and the challenges they face. We start with an understanding of the unique health challenges for the area and then look at how the finances are impacted. Looking at rural districts and bigger hospitals, we will get a strong sense of the issues facing these regions' health care sector.

*Meredith Moore (Moderator), AVP-Analyst, Moody's Investor Service  
J. Britton Tabor, CPA, FACHE – Executive Vice President and CFO/Treasurer,  
Erlanger Health Systems - Chattanooga  
Matt Caine, Managing Director, SOLIC Capital Advisors  
Nessy Shems, Managing Director; Health Care Finance, Piper Jaffray & Co*

6:00- 11:00 p.m.

**Free Evening Downtown Shuttle**

The Southern Municipal Finance Society will provide shuttle service for all attendees from the Resort to downtown. Included in the Gaylord Resort Fee, guests have free admission to the World-Famous Wildhorse Saloon. Additionally, the resort offers daily shuttle service to Grand Ole Opry House, Opry Mills, and General Jackson Showboat.

## Day 2: Friday, September 20, 2019

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- 8:00 – 9:30 a.m.      **Continental Breakfast**
- 8:30 – 9:45 a.m.      **Debanking**  
Wake up to this potentially concerning issues. While sipping your coffee learn about banks leaving rural areas and what this could mean. Direct loans were important during the previous recession; will this trend leave these areas more vulnerable?
- Dennis Whittaker (Moderator), Senior Portfolio Manager – Fixed Income, Arvest Wealth Management*  
*Randy Dennis, President, Managing Partner, DD&F Consulting*  
*Cheryl Cherry, Business Development Director, Self Help Credit Union*  
*Daniel Allen, Senior Vice President, Raymond James & Associates*
- 9:45 – 11:00 a.m.      **Disaster Recovery**  
States in this region have experienced multiple natural disasters. Hear from experienced professionals on ways in which these disasters are changing and how we look at and consider recovery. Get insights on FEMA, transitioning dwellings, and both the risks and the ability to recover economically and financially.
- Lisa Schroeer (Moderator), Senior Director, S&P Global Ratings*  
*Robin Barnes Executive Vice President & COO, Greater New Orleans, Inc.*  
*Mathew Sanders, Louisiana Office of Community Development*  
*Elizabeth A. Andrews, Professor of the Practice and Director, Virginia Coastal Policy Center, William & Mary Law School*
- 11:00 a.m.      **Public Finance Career Panel & Student Outreach**  
Seasoned municipal finance professionals discuss their experiences and opportunities in the field.
- Dennis Whittaker (Moderator), Senior Portfolio Manager – Fixed Income, Arvest Wealth Management*  
*Lisa Schroeer, Senior Director, S&P Global Ratings*  
*Napoleon Wallace, Co-Founder, Activest; Former NC Deputy Secretary of Commerce*  
*Barbara VanScoy (Moderator), The FB Heron Foundation*
- 12:15 p.m.      **Luncheon: Recruiting, Outreach and Student Engagement**  
SMFS welcomes students from Vanderbilt University, Tennessee State University and Lipscomb University. We encourage attendees to network and engage with these future municipal finance professionals.