Pennsylvania Economic Development Institute and PEDA Present:

The Nuts and Bolts of New Market Tax Credits

December 14, 2016
9:30 am - 11:00 am
Web Seminar
The Nuts and Bolts of New Market Tax Credits

During this web seminar, representatives of the Community First Fund will cover the “nuts & bolts” of New Market Tax Credits (NMTC) including an introduction to NMTC, how these funds are invested, how to access funding, and success stories of NMTC projects in Pennsylvania. Information will also be incorporated on funding regulations, eligible projects, hiring a qualified consultant, selecting a financial institution, and the legal and accounting perspectives a borrower needs to know. The following outline is subject to modifications.

- NMTC definition and program overview
- Who the parties are in NMTC deals
  - What organizations/institutions are involved and how they integrate
- How NMTC is structured
  - Review of Community First Fund NMTC structure
- Credit amounts available
- NMTC benefits
- What businesses/projects are eligible for financing
  - Review of criteria for financing potential projects
- Sources of funds in NMTC deals
- NMTC project success stories
  - Review of NMTC projects funded by Community First Fund

Professional Development Units

This event qualifies for 1.50 organizational PDUs (Finance) through the Pennsylvania Economic Development Institute (PEDI).

Additional information is provided in the Guidelines for Certification of Economic Development Organizations issued by DCED and in PEDI’s Policies and Procedures.

Note: We reserve the right to reschedule or cancel this offering. In the event of a cancellation, a refund will be provided to registrants.

Presenters

Pamela Woodell, Vice President, New Market Tax Credits, joined Community First Fund (CFF) in 2013. She is responsible for underwriting, structuring and monitoring all CFF’s NMTC transactions. Pam has 25 years of experience in community development, affordable housing and tax credit financing. She coordinated the deployment of $45 million in financing associated with CFF’s two NMTC allocations. She previously created and oversaw Santander Bank’s $500 million NMTC program, including the management of its community development lending program.

Pam holds a Bachelor of Arts degree from the University of Arkansas and has completed property development management training through the Pennsylvania Community Development and Finance Corporation.

Jim Buerger, Senior Vice President and Chief Lending Officer, joined Community First Fund in 2010. He directs all lending activities for the organization and is a vocal advocate for CFF’s clients in the communities they serve. Jim has over 35 years of financial services experience in Lancaster, Reading and the Lehigh Valley, including positions with Fleetwood Bank and Fulton Bank. He coordinates the overall NMTC project sourcing. In his 35+ years of lending in these regions, he has overseen more than $500 million in community loans.

Jim holds a Bachelor of Arts degree in Business Administration from Franklin and Marshall College, a Master of Business Administration degree in Finance from Shippensburg University and is a graduate of the Stonier Graduate School of Banking.

Registration Information

Registration Fees: The per person fee for PEDA members is $80 and for non-members is $105.

Cancellation & Refund Policies: Requests for cancellations and refunds must be made in writing and received by close of business December 2nd. No refunds will be granted after that point. All cancellations and refunds are subject to a $50 administrative fee. No-shows will be billed in full.

Questions: Contact Joshua Skopp at (717) 441-6047 or jskopp@wannerassoc.com.
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REGISTRATION FORM

Attendee Information: One registration per form. For additional registrations, copy this form or download additional forms from www.peda.org. All requested information is required.

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REGISTRATION

Online registration will remain open through COB on December 12th. Please select a registration option below.

- PEDA Member: $ 80
- Non-Member: $ 105

Total Amount Due: $ _____________

PAYMENT

1. Check – Download this form, complete required information and mail, with check made payable to Pennsylvania Economic Development Association, to 908 N. 2nd St., Harrisburg, PA 17102 or fax form to (717) 236-2046.

- Payment Enclosed
- Check requested / will follow in the mail

2. Credit Card – Go to www.peda.org to register and pay by credit card for the event.

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