

NOVEMBER 5-6 » A VIRTUAL EVENT

SEVENTH ANNUAL

INTERFACE

SENIORS HOUSING SOUTHEAST

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CONFERENCE PROGRAM

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00:00:03:00



00:00:03:00



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Moves for Seniors offers a full range of moving and downsizing services and acts as the resident's advocate to break down barriers for a swift transition into their new home.

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Moves for Seniors | A division of Transit Systems, Inc.

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7TH ANNUAL INTERFACE SENIORS HOUSING SOUTHEAST

Welcome to the 7th annual InterFace Seniors Housing Southeast conference, scheduled for Nov. 5-6!

This year's virtual format offers some great opportunities – including the chance to re-watch panels a second time or watch any you may have missed Thursday or Friday.

You can participate in live education and networking sessions in the form of interactive roundtable discussions and virtual networking cocktail hours, which are scheduled for both days of the event.

There's also an opportunity to visit the InterFace Seniors Housing Southeast sponsor and exhibitor pages.

We'd like to sincerely thank our sponsors and speakers for supporting InterFace Seniors Housing Southeast. Also, a huge thanks to the attendees for being adaptable and walking down this virtual event path with us in a difficult year.

We will be sending a “Know Before You Go” email to all conference registrants the morning of the event. This will include the link to log in to the conference portal, as well as reminders that you will find helpful.

We look forward to connecting with you virtually!

Best Regards,

Eric Goldberg & Rich Kelley
Seniors Housing Business & InterFace Conference Group



Eric Goldberg
*Media Advisor
Seniors Housing
Business*



Richard Kelley
*Senior Vice President
InterFace Conference
Group*

AGENDA: THURSDAY, NOVEMBER 5

9:45 - 10:15 AM — KEYNOTE ADDRESS: WHY SENIORS HOUSING NEEDS A NEW MARKETING PLAN



Mark Thornhill
*Author & Futurist
CEO/Founder of
Cozy Homes*

10:15 - 10:30 AM — BREAK

10:30 - 11:20 AM — THE POWER PANEL: CEOs DISCUSS THE STATE OF THE INDUSTRY

SPONSORED BY:



Eric Mendelsohn
*President & CEO
National Health
Investors*



Jeff Sands
*Managing Principal,
General Counsel
HJ Sims*



Chris Hollister
*Co-Founder &
Vice Chair
Pegasus Senior Living*



Robb Chapin
*Chief Executive Officer
Bridge Investment
Group*



Chris Guay
*Founder & CEO
Vitality Living*



Allen McMurtry
*SVP, Seniors Housing
Grandbridge Real
Estate Capital
Moderator

KNOW BEFORE YOU GO

Date: Thursday, Nov. 5 - Friday, Nov. 6

Sessions begin at 9:45 AM Eastern each day.

The appointments schedule is open through Friday, November 6 at 5:00PM Eastern

The event portal will remain open until December 6 so you can watch sessions for the next 4 weeks.

Connect with us on Twitter:

#IFSeniorsHousingSE

Follow @InterFaceGroup and @SeniorHousingBZ on Twitter

Join us on LinkedIn:

Seniors Housing Business LinkedIn Group

Thank you for joining us at InterFace Seniors Housing Southeast!

While the event portal is simple to navigate, the information below will ensure you don't miss anything during the virtual event.

HOW TO LOGIN:

Registered attendees may log in to the virtual event portal, visit <https://cvent.me/7kNWQ4>

When you log in with the name & email address with which you registered, you'll receive a confirmation code via email and via text, if you included a mobile phone number when you registered.

The emailed confirmation code will come from Kelly Moustafa. The subject line will be "InterFace Seniors Housing Southeast Verification code."

If you don't see a confirmation code in your inbox, check your spam or junk folder.

If your company has very strict spam filters, you may need to ensure you can receive the confirmation via text. If you need to update your registration to add a mobile number to your record, visit the registration site, and click the "already registered" link under the "register now" button and then modify your registration. (You can find the registration site by visiting www.interfaceconferencegroup.com and clicking on the InterFace Seniors Housing Southeast event and following the info/register link.

At the event portal login, if you try to log in but the "next" button is grayed out when you enter your name and email address, try turning off your VPN or have your IT team whitelist Cvent domains (cvent.me and cvent.com).

***NOTE:** This portal is web-based. Early marketing emails incorrectly stated there would be an app, but this event is not app based. You do not need to download anything. You can access the event portal on a computer, tablet or phone using a browser.*

HOW TO JOIN A SESSION:

Once you are in the portal, you can visit the “My Event” tab or the “All Sessions” tab. Click on the name of any session. A few minutes before the session starts, a “Join Session” button will appear in the header. Click this button to watch the session or join a roundtable discussion.

If you are able to log in but the sessions won't play, you may have to turn off your VPN, try using a different browser (like Firefox or Chrome) or watch from another computer, tablet or phone.

All presentations and panel sessions (but not roundtables) are recorded. Any recorded sessions can be watched in the portal for 4 weeks following the event. Just visit the session page and click on the “Replay” button.

ENGAGE WITH US:

- Have a question during a panel? Some sessions will have a Q&A chat to the right of the video in the portal — enter your question or upvote the questions you most want to see answered.
- We have attendee roundtables scheduled for Thursday at 12:20 Eastern and Friday at 12:40 Eastern. To participate or listen in, visit the roundtable session pages at the start time and click “Join Session” to enter the Zoom-facilitated collaborative chat session. (Roundtables are not recorded. You must join live to hear the discussion.)
- We will also host virtual networking hours at 3:40 on Thursday and 3:50 on Friday. Attendees will join a Zoom session where we will throw out an icebreaker question and then push participants into smaller breakout sessions to chat.

ENGAGE WITH SPONSORS & EXHIBITORS:

Visit a sponsor or exhibitor's page. Download files they've made available and/or follow links to their websites, videos and/or social media pages.

Send a message using the “Contact Us” button on the sponsor's page.

On the “My Event” page, there is a module that says “Looking to Network?” Click the “Schedule Appointment” button to send a request for a 1:1 meeting with a company representative. You'll receive an email confirmation with video chat link to use at the time of the schedule appointment once the invitation is accepted.

DAY-OF TROUBLESHOOTING & VIRTUAL HELP DESK:

Session isn't playing or loading: Update your browser or use a different browser, like Chrome or Firefox. Turn off your VPN.

Virtual help desk: The InterFace staff will offer help via video chat. Visit with us via the “join virtual booth” button in the Virtual Help Desk within the event portal between 9:00 and 5:00 Eastern Thursday or Friday.

Can't get into the event portal? You can join our Zoom chat at www.interfaceconferencegroup.com/help-desk (during event hours). You can also reach us via email at kmoustafa@francemediainc.com.

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VIRTUAL EXHIBIT HALL

We have 17 sponsors and exhibitors eager to meet with attendees. Please take some time during the week to check out the information they've posted on their landing pages within the Exhibitor section of the event portal.

Get in touch with companies via the "contact us" forms on their company pages; download their white papers, brochures and catalogs; or check out their links to websites, videos and social media.

The screenshot shows the exhibitor page for KeyBank Real Estate Capital. The navigation bar at the top includes 'My Event', 'All Sessions', 'Exhibitors' (circled in red), and 'Sponsors'. A 'View all exhibitors' link is in the top right. The exhibitor name 'KeyBank Real Estate Capital' is displayed with a 'Silver' badge. Below the name is a 'Contact us' button (circled in red) and social media icons for LinkedIn and Twitter (circled in red). The 'Description' section contains text about KeyBank's services in the healthcare and seniors housing industry. Below the description is a 'Show less' link. The 'Exhibitor Content' section (circled in red) features a 'Files' tab (circled in red) and a table of downloadable files.

File Name	Size	Action
FHA 232 New Construction Rehab	79 KB	Download
KeyBank Merchant Services	464 KB	Download
KeyTotal Invoice & Pay	219 KB	Download
Fannie Mae Seniors Housing Program	109 KB	Download
Freddie Mac Seniors Housing Program	112 KB	Download

Start at the "Exhibitor" tab.

Click the link icon for a company's website or click the social media icons to keep up with the company's news after the conference ends.

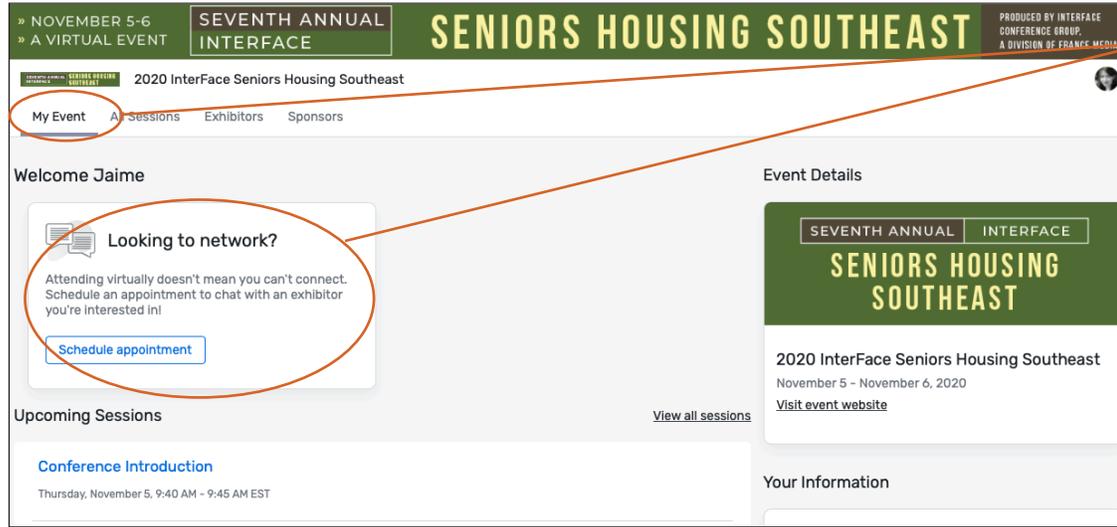
Leave a message in the "Contact Us" form if you want the company to reach out with more information.

And check out the Files & Links sections for white papers, catalogs, brochures, video demos and more.

APPOINTMENTS MODULE - ATTENDEE ACCESS

Interested in connecting with our sponsors and exhibitors? Reach out directly via the appointments module. Attendees can request a virtual meeting with the appointed rep from any of our participating sponsors and exhibitors — and you may receive appointment requests via email. All attendee-initiated appointments will utilize a Zoom link supplied by the portal in the meeting invite. Some sponsor/exhibitor appointments will utilize the sponsor/exhibitor's own chat link or will include a phone number for the attendee to call at the set time. For more information, check out the FAQ at

<https://interfaceconferencegroup.com/faq-attendee-access-to-appointments-interface-seniors-housing-southeast/>



Start at the “My Event” tab.
Click the “Schedule Appointment” button.

*** Appointment Type - Edit**

Exhibitor 1:1 Appointments ✓

You will appear as free for this appointment type until an appointment is accepted.

*** Attendees - Add**

Alicia Turlington - Available
Conference Manager
France Media, Inc. Remove

*** Time and Location - Edit**

Thursday, November 05 2 of 2 Attendees Available

8:30 AM - 8:40 AM ET
Virtual Meeting
<https://zoom.us/>

Capacity: Unlimited

*** Subject**

Meet with Seniors Housing Business at InterFace event on Thursday

Description

Include a brief description of your company & meeting request. Feel free to include your phone & email address so the recipient can contact you outside of the appointment portal if they prefer.

Choose the person you'd like to meet with. (You can add more than one person to an invitation.)

Attendees can reach out to a company representative with most sponsors and exhibitors. Sponsors/exhibitors can reach out to attendees.

Choose the time for the meeting request.

For Exhibitor 1:1 meetings initiated by attendees, a Zoom link will autofill. Due to limited number of Zoom licenses, some exhibitor access requires them to enter their own link or a phone number.

To add a meeting to your personal calendar, open an entry on your calendar in the portal and click the “add to calendar” button.

Meet with Seniors Housing Business at InterFace event on Thursday ✕

Your Status: Tentative

Edit Cancel appointment

Thursday, November 05
8:15 AM - 8:25 AM ET

Virtual Meeting

[Add to Personal Calendar \(Outlook, etc.\)](#)

Description
Briefly your company and its products/expertise & request a meeting. Best practice: include your email and phone number in case the recipient prefers to contact you directly instead of through the appointment module.

Private Note - Add

Host

Jaime Lackey - Available
VP, Marketing & Digital Strategy
France Media Inc.

Attendees

Alicia Turlington - Available Check-In
Conference Manager
France Media, Inc.

If you do not want to schedule meetings at certain times, block off times under “appointment type” in your appointment calendar.

When you add an event to your personal calendar, you can also invite a colleague and they can join the same Zoom link at the time of the meeting.

AGENDA: THURSDAY, NOVEMBER 5

11:20 - 11:35 AM — BREAK

11:35 AM - 12:05 PM — Q&A: POWER PANEL CEOs ANSWER AUDIENCE QUESTIONS

Join this collaborative Zoom session to hear speakers from the Power Panel address questions that were submitted via chat during the panel discussion & any questions that arise during this 30-minute session.

12:05 - 12:20 PM — BREAK

12:20 - 12:50 PM — NETWORKING ROUNDTABLES

SPONSORED BY:



Investment Outlook for the Active Adult/55+ Market: Mark Marasciullo, CIO of United Group of Companies, will moderate this interactive discussion. Please bring your questions and share your thoughts during this collaborative Zoom session.

Retaining and Recruiting Talent — An Operator's Staffing Best Practices: Join moderator Daniel Almendares, SVP of Operations with SRI Management, for insight into hiring and retaining the best staff. Share ideas about what works for your company and ask questions of Almendares and industry colleagues during this interactive session.

Seniors Housing Market Valuations — Where are They Now and Where are They Going? Zach Bowyer, Managing Director with JLL Valuation & Advisory Services, will share his thoughts on industry market valuations and answer attendee questions during this collaborative Zoom session.

Connecting Residents and Staff — Breaking Isolation: While safety and social distancing remain paramount, our industry must also attend to the mental wellbeing of residents (and staff). Part of that is social connection. Join moderator Trevor Dowswell, CTO of Hotel Internet Services & Beyond TV, for ideas and discussion of best practices.

12:50 - 1:30 PM — LUNCH BREAK

1:30 - 2:20 PM — INVESTMENT UPDATE

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SHOULD TODAY'S INVESTOR BUY, SELL OR HOLD?



Michael Feinstein
Managing Director
Focus Healthcare
Partners



Brian Sunday
Director & Senior
Portfolio Manager
AEW



Isaac Dole
Founder/CEO
Birchwood Health
Care Partners



Adam Heavenrich
Managing Director
Heavenrich & Company
***Moderator**

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Windsor at Celebration • Celebration, Florida
239 units

Next
Up

Kiawah Island • South Carolina
200 units



Delray Beach • Florida
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AGENDA: THURSDAY, NOVEMBER 5

2:20 - 2:35 PM — BREAK

2:35 - 3:25 PM — CAPITAL MARKETS

SPONSORED BY:  telkonet

WHICH PRODUCT TYPES ARE HOT AMONG LENDERS & WHICH ARE NOT? WHY?



John Powell, Jr.
Executive Vice President
Bellwether Enterprise
Real Estate Capital



Dave Harper
SVP
Capital One
Healthcare Real Estate



Charlie Shoop
SVP – Mortgage Banking
KeyBank Real
Estate Capital



Adam Sherman
*SVP – Head of
Senior Care*
Live Oak Bank



Jung Park
Managing Director
Monticelloam
***Moderator**

3:25 - 3:40 PM — VIRTUAL COCKTAIL NETWORKING HOUR

3:40 - 4:40 PM — DAY ONE CONCLUDES

AGENDA: FRIDAY, NOVEMBER 6

9:45 - 10:35 AM — OPERATIONS UPDATE

SPONSORED BY: 

HOW TO MAXIMIZE OCCUPANCY AND BEAT THE COMPETITION IN YOUR MARKET



Jeff Arnold
Chief Operating Officer
United Group of
Companies



Donna Moore
*Chief Operating
Officer*
Isakson Living



Christopher Schott
Executive Vice President
Alcore Senior
Management



Bill Sciortino
Chief Operating Officer
Discovery Senior
Living



Daniel Almendares
SVP of Operations
SRI Management



Bob Burg
Exec. Vice President
Moves For Seniors
***Moderator**

10:35 - 10:50 AM — BREAK

Fostering Better Lives

WITHIN & BEYOND

The Industry Boundaries



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AGENDA: FRIDAY, NOVEMBER 6

10:50 - 11:40 AM — THE DEVELOPMENT OUTLOOK

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EXPERTS ANALYZE THE SMARTEST PLAYS FOR DEVELOPERS IN 2020



Jesse Marinko
CEO & Founder
Phoenix Senior
Living



Michael Uccellini
President & CEO
United Group of
Companies



Richard Ackerman
Chairman, Senior
Managing Principal
Big Rock Partners



Tod Petty
Exec. Vice President
Lloyd Jones
Senior Living



Ryan Frederick
Founder & CEO
Smart Living 360
***Moderator**

11:40 - 11:55 AM — BREAK

11:55 AM - 12:25 PM — Q&A: DEVELOPMENT OUTLOOK PANELISTS ANSWER AUDIENCE QUESTIONS

Join this collaborative Zoom session to hear speakers from the Development panel address questions that were submitted via chat during the panel & any questions that arise during this 30-minute session.

12:25 - 12:40 PM — BREAK

12:40 - 1:10 PM — NETWORKING ROUNDTABLES

SPONSORED BY:



Filling the House — Occupancy Challenges & How to Overcome Them: Bob Burg, EVP of Moves for Seniors, will lead this discussion on obstacles to increasing occupancy in 2020. Join this Zoom session to share your thoughts, ask your questions or just listen to the discussion.

Robots — What Role will they Play in Caregiving & Operations? 2020 has certainly pushed the boundaries on technology in many industries. Join Serena Lipton, analyst — seniors housing, JLL Valuation & Advisory Services, as she facilitates a conversation about the latest in robotic advancements and what the future will bring.

Tired of COVID-19 Being Used as an Excuse? Pandemic Marketing and Lease Up Tips: Moderator Christopher Schott, EVP of Alcore Senior Management, will lead this interactive Zoom session discussing marketing and lease-up strategies that are effective even during the pandemic.

Secrets to Successful Technology Implementation: Struggling to get staff on board with new technology? Need suggestions to help residents embrace technology? Kian Saneii, founder and CEO of Independa, will lead this Zoom-facilitated discussion sharing ideas that will help with your technology implementation. Bring your questions or share tips about what has worked for your company.

1:10 - 1:35 PM — LUNCH BREAK

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“ *Providing a consistent and fast internet connection is something that simply is not up for negotiation in today's world where virtually everyone regardless of age or background, seeks to access online services to communicate with the wider world,”* – Bernard Kratsig, Director of Information Technology at Bishop Gadsden

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- 24/7/365 Tenant Support Services
- TV Entertainment Systems
- TV Casting Systems

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Hotel Internet Services, Inc. **Hotel Internet SERVICES**

AGENDA: FRIDAY, NOVEMBER 6

1:35 - 2:25 PM — TECHNOLOGY

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INVESTING IN TECHNOLOGY THAT DRIVES REVENUE AND IMPROVES RESIDENT CARE



Joe Jasmon
CEO, Managing Partner
American Healthcare
Management Group



Tracy Chadwell
Founding Partner
1843 Capital



Kian Saneii
Founder & CEO
Independa



Julie Podewitz
Chief Sales Officer
Vitality Living



Charles Turner
CEO
Kare
***Moderator**

2:25 - 2:40 PM — BREAK

2:40 - 3:35 PM — DESIGN & BUILD

SPONSORED BY:



ARCHITECTURAL AND DESIGN TRENDS IN THE SOUTHEAST



Erin Berry Harps
Director of Interior
Design, Aptura
Direct Supply



Bill Foster
Senior Associate
Lantz-Boggio



Janet Meyer
Principal
BCT Design Group



Todd Hudgins
SVP, Senior Living
Erdman
***Moderator**

3:35 - 4:50 PM — VIRTUAL COCKTAIL NETWORKING HOUR

4:50 PM — CONFERENCE CONCLUDES

Please take some time to visit the pages of our sponsors and exhibitors
to learn more about their products and services

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Capital One
Direct Supply Aptura

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JLL
Keybank Real Estate Capital
Lantz-Boggio Architects
Live Oak Bank
MDU Internet Services

Moves For Seniors
National Health Investors, Inc
Propel Insurance
Telkonet, Inc
United Group of Companies



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