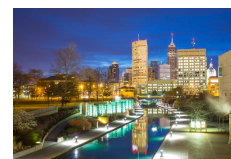




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SPEAKING ENGAGEMENTS

Opportunity Zones: Potential Benefits And Practical Considerations

DATE

February 26, 2019
11:30 a.m. (Eastern)

LOCATION

Barnes & Thornburg
11 S. Meridian Street
Indianapolis, IN, 46204

SPEAKERS



Erik J. Rickard

Partner

The program, hosted in partnership with the Urban Land Institute, will consist of a panel discussion of the tax deferral that is rippling through the real estate industry as a result of recent tax reform. We will be covering Opportunity Zones from every angle with our panel of speakers.

Tamar Jacoby, President of Opportunity America, Washington DC, will discuss the purpose of Opportunity Zones and the long-term vision of the program. Opportunity America is a nonprofit working to promote economic mobility—work, skills, careers, ownership and entrepreneurship for poor and working Americans. A former journalist and author, Tamar has written articles for The New York Times, The Wall Street Journal, The Washington Post, The Weekly Standard and Foreign Affairs, among other publications. She is the author of “Someone Else’s House: America’s Unfinished Struggle for Integration” and editor of “Reinventing the Melting Pot: The New Immigrants and What It Means To Be American.” Since 2008, she has been president of ImmigrationWorks USA.

Attorney Erik Rickard, Partner at Barnes & Thornburg LLP, Columbus, Ohio,

will discuss the legal issues and considerations associated with forming opportunity funds. Through his role at Barnes and Thornburg, Erik advises on real estate, real estate finance, joint ventures, equity funds, commercial lending and new markets, low-income housing and historic rehabilitation tax credits.

Ben Matherly, CPA, CCIFP, Senior Manager at Crowe, LLP, will discuss the tax impact and planning opportunities with setting up a fund. Ben has more than 15 years of tax compliance and consulting experience working with general contractors, construction management firms, specialty subcontractors, real estate developers, and architectural & engineering firms. In addition to compliance areas of taxation, he has experience with succession planning, fixed assets, tax reform, Opportunity Zone and general business consulting.

Matt Waggoner, Senior Vice President, JLL, will discuss the concept of exit values, locations that offer the best value for Opportunity Zones, and how geographic parameters align with the commercial markets. Matt leads the tenant representation team, with a specific focus on helping companies maximize the value of their real estate through people-focused strategies. Matt advises many of Indiana's top technology companies and serves a variety of multi-market clients by functioning as their "in-house" real estate department. In 2016, Matt founded Spaces Indiana, a hub for workspace innovation and excellence.

Event Pricing (includes lunch)

Standard Non-Member Rate: \$40

ULI Members: \$25

Questions? Contact Courtney Brown at cbrown@btlaw.com or (317) 231-7312.