



# Annual Affordable Housing Summit



November 8, 2023  
The Westin Jackson



## **2023 Annual Affordable Housing Summit Schedule of Events**

11:30 Registration

12:00-1:00 (Lunch Opening Session) Inflation  
Reduction Act Resources for Affordable Housers

1:00-2:00 Mike Chaney, Insurance Commissioner &  
Mark Shelburne, Novogradac

2:15-3:00 Debt/Equity Panel

3:15-4:00 LIHTC is Complicated, Closing Doesn't  
Have to Be

4:15-5:00 QAP Presentation

5:00 Reception

# 2023 MAAHP AFFORDABLE HOUSING SUMMIT SPONSORS



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Tony Brunini, Past President- Ross & Yerger

Jason Spellings, Additional Vice President- Hughes Spellings, Inc.

John Sullivan, Immediate Past President- Enterprise Community Partners

Phil Eide, Hope Credit Union

Kathy Laborde, Gulf Coast Housing Partnership

Todd Little, Little and Associates

Kelly Longwell, Longwell Riess

Bob Robinson, Rowanoak Development

Kelly Rushin Lewis, Jones Walker

MAAHP is committed to providing access to safe, quality affordable housing. The partnerships we have built over the years have provided us the needed stability to face housing shifts or unsure markets and allowed us to continue to provide quality developments that are safe, affordable, and build strong communities..



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## SPEAKER BIO'S

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### **TYLER ARCHIE, VP STRATEGIC INITIATIVES FOR HOPE ENTERPRISE CORPORATION**

Tyler Archie has work experience in the field of finance and strategic initiatives. Tyler currently holds the position of VP Strategic Initiatives at Hope Enterprise Corporation, starting in April 2023. Prior to this role, they worked as a Financial Analyst at the same company since February 2021. Before joining Hope Enterprise Corporation, Tyler worked at CivicSource as the Director of Compliance from January 2017 to October 2020.



Tyler Archie obtained a Bachelor's degree from Washington and Lee University. Afterwards, they pursued a Doctor of Law (JD) degree from the University of North Carolina at Chapel Hill. Additionally, Tyler has obtained certifications as a Commercial Solar Lending Professional from the University of New Hampshire and as an Attorney from the North Carolina State Bar and the Louisiana State Bar. Tyler has also obtained certifications as an Insurance Producer and Title Producer from the US National Title Insurance Company.

### **DR. BILL ASHLEY, DIRECTOR, BUSINESS RESEARCH, WORKFORCE, & ENERGY AT THE MISSISSIPPI DEVELOPMENT AUTHORITY**

Dr. Bill Ashley is the Director of Business Research, Workforce, & Energy at the Mississippi Development Authority and Former president of Shelton State Community College. He received a Doctor of Philosophy (PhD) focused in Community College Leadership from Mississippi State University.



### **BYRON BUCKHALTER, DEVELOPMENT MANAGER OF THE PARK COMPANIES**

Byron Burkhalter currently serves as Development Manager for the Park Companies and has been with Park since 2019. His primary focus is on business development, acquisitions, financial modeling, and analysis, securing housing tax credit allocations, debt, and equity capitalization, and the closing of new projects. He also works to develop strategic relationships with various government agencies, lenders, syndicators, and joint venture partners.



Byron received a Bachelor's and Master of Accountancy from the University of Mississippi and is a licensed certified public accountant. Before joining Park, Byron worked in Atlanta, Georgia as a management consultant for KPMG and Alvarez and Marsal. Since Byron's arrival, he has helped Park get awarded and close over ten new projects in three states totaling over 800 units. Due to the intricate nature of these projects, Byron's background has provided him with a distinct skillset, with expertise in all areas of affordable multifamily housing development.

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### **MIKE CHANEY, INSURANCE COMMISSIONER OF MISSISSIPPI**

Mike Chaney, Mississippi's 11th Commissioner of Insurance and State Fire Marshal, is currently serving his fourth term in office. First elected in 2007, Chaney brought extensive business knowledge and experience to the office combined with 15 years of service in the Mississippi House and Senate.



### **MICHELLE DILLER, POLICY PROGRAM DIRECTOR FOR GREEN COMMUNITIES AT ENTERPRISE COMMUNITY PARTNERS**

At Enterprise, Michelle works with state and local policy directors to advance the adoption of green building practices in the affordable housing sector across the country and with federal staff to align Enterprise's national agenda with state, regional, and local policy needs.



Michelle brings over a decade of experience in the high-performance building arena. Prior to joining Enterprise, she worked for the National Association of Home Builders where she provided technical expertise, education, and advocacy in all aspects of a high-performance residential building, and served as the resident technical expert for the National Green Building Standard.

Previously she promoted sustainability in the built environment in private consulting where her portfolio included multifamily, mixed-use, healthcare, federal, higher education, and commercial projects; as an engineer overseeing transportation drainage design and neighborhood retrofits; and as an environmental regulator in Florida.

Michelle holds a bachelor's degree in engineering from the University of Michigan and a master's degree in environmental science and public affairs from Indiana University.

### **AUSTIN DIVINO, SENIOR VICE PRESIDENT, R4 CAPITAL**

Austin Divino is a Senior Vice President of R4 Capital based in the firm's Austin, TX office. With a focus on the acquisition of affordable housing tax credit properties, Austin has closed a wide variety of LIHTC transactions throughout the country, representing over \$350 million of net invested equity.



Prior to joining R4 Capital 2016, Mr. Divino worked with Wentwood Capital Advisors, first as a financial analyst and later as an Associate Asset Manager. Mr. Divino negotiated the disposition of more than \$50 million in assets and managed a portfolio valued at \$150 million. Previously, Mr. Divino started his career as a tax consultant for two local accounting firms. He is a member of TAAHP and is a Housing Credit Certified Professional. Mr. Divino earned his BBA from the McCombs School of Business at the University of Texas.

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### **PHIL EIDE, SENIOR VICE PRESIDENT, COMMUNITY AND ECONOMIC DEVELOPMENT FOR HOPE**

Phil joined HOPE in September 2000 as ECD was creating a mortgage program. He currently works on HOPE'S Economic and Community Development efforts providing debt to Low Income Housing Tax Credit developments, working with New Market Tax Credit projects and other community development efforts. Phil worked closely with Hope's efforts to rebuild affordable housing in areas devastated by Hurricane Katrina.

He was a Housing and Urban Development fellow before joining ECD. He previously served as Executive Director of Jackson Metro Housing Partnership, the largest nonprofit housing organization in the Jackson, MS metropolitan area. He obtained an undergraduate degree from the University of Wisconsin and a master's degree from Jackson State University. He serves on the American Heart Association Greater Southeast Multicultural Initiative Committee, Boards of Springboard to Opportunities, Gulf Coast Renaissance Corporation, Mississippi Association of Affordable Housing Providers and Housing Mississippi.



### **GREG HETTRICK, DIRECTOR OF COMMUNITY INVESTMENT, FEDERAL HOME LOAN BANK OF DALLAS**

First Vice President and Director of Community Investment Greg Hettrick leads a team that is dedicated to providing grants to fund gaps in the financial structure of affordable housing, economic development, and community revitalization projects throughout FHLB Dallas' five-state District. Mr. Hettrick also has responsibility for the review, approval and policy direction of FHLB Dallas' three community investment advance programs.

Prior to joining the Federal Home Loan Bank of Dallas in 2008, Mr. Hettrick spent 17 years with Bank of America, including 10 years with its Community Development Corporation and Real Estate Development Group in Dallas, Texas. During his tenure in the Real Estate Development Group, Greg acquired, redeveloped and delivered more than 2,700 multifamily units where the renovation scope averaged from \$5,000 to \$17,000 per unit at each property. He also directed the development and construction of a 220-unit multifamily infill development that utilized Low Income Housing Tax Credits, a 192-lot subdivision in southeast Dallas, as well as more than 30 other in-fill homes in Dallas and Fort Worth. He led the Community Investment activities in the Carolinas and Delaware region for Bank of America. Bank of America earned an Outstanding CRA rating in this region during his tenure there.

Greg is active in the community, having served on the Dallas Mayor's Affordable Workforce Housing Taskforce, the Ferguson Road Initiative Board of Directors, and the Board of Directors of the National Multi Housing Council. He is former chairman of the Dallas Community Development Partnership, and previously has been involved with The Real Estate Council, Urban Land Institute and Home Builders Association of Greater Dallas. He is currently a member of the Urban Land Institute, Texas Association of Affordable Housing Providers and the Mississippi Association of Affordable Housing Providers. Mr. Hettrick received his bachelor of science degree in finance and his master of business administration from the University of South Carolina. He can speak on a range of topics, including affordable housing development and redevelopment, applying for FHLB Dallas AHP grants and community investment.



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### **ABE KRUGER, SK COLLABORATIVE**

Abe Kruger, SK Collaborative co-founder, honed his expertise in sustainable construction over the last 17 years as a contractor, educator, and consultant in the residential construction industry. He has numerous industry accreditations, including Certified Energy Manager (CEM), LEED AP HOMES, BPI Building Analyst, and Home Energy Rating System (HERS) Trainer, Quality Assurance Designee (QAD), and Rater.

He is a member of the National Residential Energy Services Network (RESNET) Board of Directors and Georgia Healthy Homes Coalition Steering Committee. He is the co-author of the first residential green building textbook, *Green Building: Principles and Practices in Residential Construction* (Delmar/Cengage Learning).



### **KELLY LONGWELL, MANAGING MEMBER OF LONGWELL RIESS**

Kelly represents clients on general tax and corporate matters, taxation of individuals and entities, federal and state tax credits and partnership taxation. She is also a licensed title insurance agent in the State of Louisiana and frequently represents development clients in real estate syndications and development, acquisitions/sales, leasing, 1031 tax-deferred exchanges, commercial loans, secured transactions, and incentive-based loans and equity investments.

Kelly is consistently recognized as one of the country's top affordable housing and community development attorneys. She advises clients on low-income housing tax credits, historic tax credits, new market tax credits, tax exempt bond financing, tax increment financing, façade donations, community development block grants, HUD insured loans and various other public finance sources. Her diverse client mix includes developers, investors, lenders, nonprofit entities, government entities, and community development entities. Working on a wide spectrum of projects, Kelly has particular expertise in structuring real estate developments to maximize tax benefits and investment. Her projects include housing developments, hotels, mixed-use developments, office buildings, health care facilities, commercial retail developments, education facilities, entertainment venues, and community facilities.



### **DAVID PAYNE, SENIOR VICE PRESIDENT/CO-HEAD OF ORIGINATIONS AT REGIONS BANK**

As the Co-Head of Originations for Regions Affordable Housing, Mr. Payne is responsible for a team of originators dedicated to securing financing opportunities for affordable housing developments across the Southeast and Texas. Mr. Payne joined Regions in 2002, bringing 21 years of expertise to his current role, focusing on real estate, finance, and relationship management. In previous roles, he has served Regions in underwriting and relationship management functions. While based in Dallas, Texas, he works in close coordination with Affordable Housing professionals throughout the Regions footprint. Payne currently serves as Past President of the Louisiana Association of Affordable Housing Providers (LAAHP) as well as President of the Mississippi Association of Affordable Housing Providers (MAAHP). He earned his bachelor's degree in finance at Mississippi State University and obtained his master's in finance at Boston University.





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### **KELLY RUSHIN LEWIS, JONES WALKER**

Kelly Rushin Lewis is a partner in the tax practice and leads the tax credit finance team. For the majority of her practice, Kelly has focused exclusively on representing investors and lenders in LIHTC transactions across the country. Kelly focuses on all aspects of the representation of lenders and investors in connection with affordable housing transactions, including the use of traditional construction and permanent financing, federal and state tax credits, tax-exempt bonds, tax exempt loans, MTEBs, HOME loans, CDBG funds, HUD, RAD and AHP grants or loans, RD loans, CITC, Fannie Mae and Freddie Mac, and others.



Kelly also has experience representing various banks in commercial real estate and industrial lending matters as well as other real estate clients through all phases of development, including acquisition, financing, leasing, and disposition in connection with hotel, retail, office, industrial, market rate housing, and affordable housing projects.

Before joining Jones Walker, Kelly co-founded Liles & Rushin, a boutique law firm focused on representing lenders and investors in affordable housing transactions around the country. Prior to forming Liles & Rushin, she worked with Birmingham law firm Maynard, Cooper & Gale handling commercial lending, public finance, real estate, and affordable housing matters for clients.

### **MARK SHELBURNE, HOUSING POLICY CONSULTANT, NOVOGRADAC**

Mark Shelburne is a housing policy consultant with Novogradac. He is based in Raleigh, N.C., and works nationally. His work includes consulting with state agencies, local governments, equity providers, lenders, attorneys and developers on topics including allocation, compliance, HOME, revitalization, supportive housing and tax-exempt bonds.



Mr. Shelburne is widely regarded as a top expert on these topics and frequently presents on them to statewide and national audiences. He also develops educational/training material and writes for various publications. Shelburne previously served as director of the Office of Housing Finance and Development at the Georgia Department of Community Affairs, counsel and policy coordinator at the North Carolina Housing Finance Agency and as a housing policy consultant for Novogradac. In these three capacities, Shelburne has revised and/or implemented 32 qualified allocation plans in 14 states, testified before Congress, provided resources to create more than 25,000 affordable rental homes, and led work resulting in four national awards. Before that, Mr. Shelburne was the general counsel of a LIHTC equity investor and an attorney in private practice. He has degrees in law, planning, and public policy from the University at North Carolina at Chapel Hill.

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### **GLENDON STEADY, MORAN CONSTRUCTION**

Glendon was born in Hartford, Connecticut, raised in Baton Rouge and is a graduate of Louisiana State University. Glendon got an early start in the construction industry spending high school summers as a laborer and carpenter for a local commercial contractor. Carrying his passion for construction into college, he received a BS in Construction Management and took a leadership role in the Construction Student Association. After his years at LSU, Glendon gained experience as an estimator and project manager on healthcare, laboratory, institutional and GSA project types. After spending over a decade in the commercial construction industry Glendon took on a management role with a large national development firm, where he continued to refine his real estate and construction expertise.



Glendon believes in a strong sense of community, is an active participant in many outreach programs; and currently volunteers as a youth soccer coach with the Baton Rouge Soccer Association.

When not working or coaching soccer, Glendon enjoys spending time outdoors with his wife Jennifer and sons Yancey and Beau. His other interests include golf, LSU sports, fishing, cooking and water skiing.

### **RACHEL THOMAS-PHILLIPS, REGIONS**

Rachel Thomas-Phillips is a Senior Vice-President with Regions Affordable Housing based in Austin, Texas. She is responsible for evaluating, structuring, and closing affordable housing debt and investment financing instruments throughout the United States with a focus on Texas and the surrounding states.



Rachel has been active in the affordable housing industry for over 15 years. Most recently, with CREA, LLC. as Senior Vice-President of Acquisitions. Rachel began her career as an accountant for one of the "Big 4," specializing in LIHTC transactions. Rachel is a CPA and graduated summa cum laude from The University of Central Florida.

### **ADAM VAUGHN, VICE PRESIDENT OF DEVELOPMENT, HUGHES SPELLINGS**

Adam joined Hughes Spellings Development in 2017. He graduated from Baylor University in 2010 with degrees in Real Estate and Entrepreneurship and received his Juris Doctor from the University of Mississippi in 2013. He practiced law prior to joining Hughes Spellings, where he serves as the VP of Development. Adam is responsible for sourcing new opportunities and securing and closing financing of acquisitions and new developments.

