

# Making the New Markets Tax Credit Work in Native Communities

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## Agenda

Thursday, May 24, 2018 | Federal Reserve Bank of Minneapolis | River Room

- 8:00 a.m. Registration and Continental Breakfast**
- 8:30 a.m. Welcome and Overview**  
Patrice Kunesh, Assistant Vice President & Director, Center for Indian Country Development  
*Federal Reserve Bank of Minneapolis*
- 9:00 a.m. NMTC 101 - The Basics**  
Learn the fundamentals of the New Markets Tax Credit Program, including the background and history of the program, key terms, what a CDE is and how New Markets Tax Credits can help your Native Community.  
  
*Rosa Martinez, Associate Program Manager, CDFI Fund NMTC Program*  
*Bill Luecht, Manager, Legislative & External Affairs, CDFI Fund*
- 10:15 a.m. Break**
- 10:30 a.m. Ways to Participate in the NMTC Program**  
Learn the various ways to participate in the New Markets Tax Credit Program. Besides creating a CDE to apply for an Allocation of New Markets Tax Credits, this session will also explain the roles of a Secondary CDE, a Leveraged Lender and an Investor.  
  
*Shane Jett, CEO, Citizen Potawatomi Community Development Corporation, Moderator*  
*Dakota Cole, Managing Director, Chickasaw Nation, Panelist*  
*Wayne Ducheneaux II, Executive Director, Native Governance Center, Panelist*
- 11:45 a.m. Lunch & Presentation: CDFI Fund Program Brief**  
*Bill Luecht, Manager, Legislative & External Affairs, CDFI Fund*



1:15 p.m.

**NMTC 101 - The Details**

This session will cover the roles and responsibilities of the various parties involved in the New Markets tax Credit Program, including the CDFI Fund, IRS, CDE, Tax Credit Investor, Leverage Debt Provider and the Borrower. It will also provide a high-level overview of what successful CDEs need to consider, and how the CDFI Fund assesses CDEs' applications during the annual competitive allocation round.

Rosa Martinez, Associate Program Manager, *CDFI Fund NMTC Program*

Karen Williams, Principal Consultant, *Infrastructure Oregon*

2:30 p.m.

**Break**

2:45 p.m.

**Opportunities & Challenges of Investing in Native Areas<sup>1</sup>**

Karen Williams, Principal Consultant, *Infrastructure Oregon, Moderator*

**Native CDE allocated NMTCs**

Andy McMillian, Cherokee Nation, *Panelist*

**Non-Native CDE with Native Investments**

Julia Nelmark, Midwest Minnesota CDC, *Panelist*

**NMTC Investor with Investments in Native Communities**

Benjamin Alderton, US Bank CDC, *Assistant Vice President, Project Manager, New Markets & historic Tax Credit Investments, Panelist*

4:00 p.m.

**Closing Remarks and Steps Forward**

Patrice Kunesh, Federal Reserve Bank of Minneapolis, *Assistant Vice President, & Director, Center for Indian Country Development*

Tanya Fiddler, Native CDFI Network, *Executive Director*

Shane Jett, CEO, *Citizen Potawatomi Community Development Corporation*

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<sup>1</sup> Federal Indian Reservations, Off-Reservation Trust Lands, Hawaiian Home Lands, and Alaska Native Village Statistical Areas