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 Areas¹
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

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