

## ULI Local Product Council Meeting

Capital Markets Council – Atlanta and Charlotte Exchange

September 5-6, 2023 | Federal Reserve of Richmond, Charlotte Branch



**Parking and Access Instructions:** Located at 530 E. Trade St. The bank is bordered by Trade, Fourth, Davidson, and Caldwell. There are plenty of surface lots near the building (a resource may be <http://www.bestparking.com/charlotte-parking/>). The entrance to the bank is on Trade Street, and by the front door, there is a speaker on the wall. Please announce yourself using the speaker and the security officer will open the door for you. Please have a picture ID with you. Upon entering the building, you will be asked to place all handheld items on a conveyor to be x-rayed and to walk through a metal detector. Security will notify a staff person to take you to the meeting room.

These procedures are routine for all visitors and usually take about 5 - 7 minutes, so you may want to arrive a few minutes early.

## AGENDA

### **Tuesday, September 5, 2023**

6:00pm: **Optional Dinner at Roosters Wood Fired Kitchen (150 N. College St.)** *pre-registration is required*

### **Wednesday, September 6, 2023**

7:30am: **Continental Breakfast / Networking**

8:00am: **Welcome**

Brian Richards, Beacon Partners (CMC Co-Chair)

Theresa Burnett, ULI Charlotte

8:15am: **Economic Update**

[Kartik B. Athreya](#), Federal Reserve Bank of Richmond, Charlotte Branch

9:00am: **Where's the Capital?**

Moderator: [Chris Campbell](#), Eastdil CIt

Panelists:

- Money Center – [Brad Smith](#), Bank of America
- Agency – [David Brickman](#), NewPoint
- Institutional Capital – [Shawn Kimble](#), Barings

9:45am: **Developer Speed Round / Open Discussion** *Capital Stack Creativity (What is getting done? Where is investor demand? How are deals structured in today's market)*

Discussion Leaders: [Brian Richards](#), Beacon Partners; [Jason LaBonte](#), Crescent Communities; [Phil Tague](#), AMLI; and [Matt Rendle](#), Selig

10:30am: **Adjourn / Networking** (until 11:00am)

Hunter Miller, Wells Fargo (CMC Co-Chair)

**Attendee List:**

First Name+C22A1:C59	Last Name	Organization Name	District Council
Travis	Anderson	JLL	ULI Charlotte
Kartik	Athreya	Federal Reserve Bank of Richmond Charlotte	ULI Charlotte
Adrienne	Bain	JPI Companies	ULI Charlotte
Drew	Barnette	Patterson Real Estate Advisory Group	ULI Charlotte
Linda	Booker	Core5 Industrial Partners LLC	ULI Atlanta
David	Brickman	NewPoint Real Estate Capital	ULI Washington
Tom	Brown	None	ULI Atlanta
Anne	Burnett	Federal Reserve Bank of Richmond	ULI Charlotte
Theresa	Burnett	ULI Charlotte	ULI Charlotte
Christopher	Campbell	Eastdil Secured	ULI Atlanta
Jeff	Cernuto	Princeton Communities	ULI Charlotte
Lee	Cochran	Laurel Street	ULI Charlotte
Rob	Cochran	Cushman & Wakefield-US	ULI Charlotte
JP	Conklin	Pensford & Loan Boss	ULI Charlotte
Audra	Cunningham	T. Dallas Smith & Company, LLC.	ULI Atlanta
John	Davidson	Parmenter Realty Partners	ULI Southeast Florida/Caribbean
Chip	Davidson III	The Brookdale Group	ULI Atlanta
Sunil	Devarakonda	WHI Real Estate Partners LP	ULI Charlotte
Darryl	Dewberry	The Spectrum Companies	ULI Charlotte
Daniel	Ethridge	The Brookdale Group	ULI Atlanta
Kris	Fetter	Faison Enterprises	ULI Charlotte
Todd	Flaman	Patterson Real Estate Advisory Group	ULI Atlanta
Michael	Gribble	Fairfield	ULI Charlotte
Randy	Holmes	Seven Oaks Company	ULI Atlanta
Krista	Hunter	Truist	ULI Charlotte
Kory	Jeter	Greystar	ULI Charlotte
Laura	Kalick	Federal Reserve Bank of Richmond	ULI Charlotte
Patrick	Kassin	Woodfield Investments	ULI Atlanta
Shawn	Kimble	Barings	ULI Charlotte
Liz	Koteles	FCP	ULI Atlanta
Jason	LaBonte	Crescent Communities	ULI Charlotte
Christina	Langrall	Quarterra Group	ULI Charlotte
Terrence	Llewellyn	Llewellyn Development, LLC	ULI Charlotte
Connor	Macon	Wells Fargo	ULI Charlotte
Matt	Martin	Federal Reserve Bank of Richmond	ULI Charlotte
Nick	Matus	Bank of America	ULI Charlotte
Hunter	Miller	Wells Fargo	ULI Charlotte
Pierre	Molster	The Carlyle Group	ULI Charlotte
Bart	Murr	Insite Properties, LLC	ULI Charlotte
Felicia	Neil	ULI Alabama	ULI Alabama
Mike	Ortlip	NewPoint Real Estate Capital	ULI Charlotte
Brendan	Pierce	Crescent Communities	ULI Charlotte

First Name+C22A1:C59	Last Name	Organization Name	District Council
Stuart	Proffitt	Proffitt Dixon Partners	ULI Charlotte
Brian	Purcell	Asana Partners	ULI Charlotte
Sagar	Rathie	Crescent Communities	ULI Charlotte
Matt	Rendle	Selig Enterprises, Inc.	ULI Atlanta
Brian	Richards	Beacon Partners	ULI Charlotte
Lisette	Rivera-Pauley	Regions Real Estate Capital Markets	ULI Atlanta
Darice	Rose	CBRE	ULI Atlanta
Andrew	Rosti	Grubb Properties	ULI Charlotte
Tom	Ryan	MetLife Investment Management	ULI Atlanta
Brad	Smith	Bank of America	ULI Charlotte
Bobby	Speir	Crosland Southeast	ULI Charlotte
David	Stewart	TerraCap Management LLC	ULI Atlanta
Mark	Stewart	Bainbridge Companies	ULI Atlanta
Travis	Stowers	U.S. Bank	ULI Charlotte
Phil	Tague	AMLI Residential	ULI Atlanta
Jeff	Thomas	Ferncroft Capital	ULI Charlotte
Michael	Threlkeld	Piedmont Capital	ULI Charlotte
Jeffrey	Titherington	Huntington Capital Markets	ULI Charlotte
John Scott	Trotter	Silvercap Partners LLC	ULI Charlotte
Laura	Ullrich	Federal Reserve Bank of Richmond	ULI Charlotte
Allan	Waller	Metzler North America	ULI Atlanta
Eric	Williams	Charter Properties, Inc.	ULI Charlotte
Shelli	Willis	Troutman Pepper	ULI Atlanta
Landon	Wyatt	Childress Klein	ULI Charlotte