



# annual finance team meeting

April 8-9, 2026

## Wednesday, April 8th • Noon to 5:00pm

Schedule	Topic	Presenter
Noon – 12:10pm	Welcome	Denver Maw
12:10pm – 12:50pm	Colorado Market	Margaret Miller
12:50pm – 1:10pm	Financials/Liquidity	Cindy Adams
1:10pm – 1:40pm	Legislation/State Credits/ Single Family Programs	Jerilynn Francis Julia Selby
1:40pm – 1:55pm	Break	
1:55pm – 2:30pm	Home Finance	Dan McMahon
2:30pm – 3:15pm	Multifamily/Single Family Indenture	David Jones
3:15pm – 3:30pm	Break	
3:30pm – 4:00pm	Swap Overview	Peter Clerc
4:00pm – 4:30pm	Structuring Planned Amortization Class (PAC)/ Down Payment Assistance (DPA) Refi Program Considerations	Cory Hoepfner
4:30pm – 5:00pm	Structuring Discussion	All
Evening	Dinner in Downtown Denver	All

## Thursday, April 9th • 8:30am to Noon

Schedule	Topic	Presenter
8:30am – 9:00am	Welcome/Breakfast	Wyatt Jones
9:00am – 9:15am	Rules of Engagement	Guadalupe Guterrez-Vasquez
9:15am – 9:35am	Strategic Plan	Executive Team – Thomas Bryan
9:35am – 10:00am	Billion Dollar Fund Discussion	Thomas Bryan Guadalupe Guterrez-Vasquez
10:00am – 10:30am	Balance Sheet Efficiency/Program Considerations	Joe Monitto
10:30am – 10:40am	Balance Sheet Discussion	All
10:40am – 10:50am	Break	
10:50am – 11:10am	Community Development	Kristi Budish
11:10am – 11:40am	25 percent Test Implications/Other Lending Sources	Alan Jaffe
11:40am – Noon	25 percent Test Implications Discussion	All
Noon	Adjourn with boxed lunch for airport	