

2023



October 11, 2023

University of Central Oklahoma

Nigh University Center

HOSTED BY:



MISSION & VISION

The Commercial Real Estate (CRE) Summit™ is jointly produced by the Commercial Real Estate Summit Foundation™ and the University of Central Oklahoma Real Estate Program. The CRE Summit™ is an annual, educational, non-political event with a vision that has three primary components.

Bring The Real Estate Industry Together

The CRE Summit™ brings the many disciplines in the real estate industry together at one time and in one place for learning (CE), networking and discussion of the common concerns of the industry.

Recognize Visionaries

The Commercial Real Estate Summit™ provides a venue to recognize visionaries who have made Pivotal contributions to the real estate industry (Pivot Award™).

The CRE Summit™ focuses on deal-making and leading-edge industry discussions between



Commercial Real Estate Licensees, Developers, Owners, Investors, Lessors, Commercial Lenders, Planners and Government Officials.

Promote Education

The Commercial Real Estate Summit™ promotes the education of the profession. The CRE Summit™ is produced by the CRE Summit Foundation™, whose purpose is to provide scholarships and grants to students and faculty who are part of the Real Estate Program at the University of Central Oklahoma. The CRE Summit™ is jointly produced by Commercial Real Estate Summit Foundation™ and the University of Central Oklahoma's Real Estate Program.

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2023 COMMERCIAL REAL ESTATE SUMMIT BREAKFAST KEYNOTE SPEAKER

UNIVERSITY OF CENTRAL OKLAHOMA HIGH UNIVERSITY CENTER | 8:30 A.M. - 9:35 A.M. GRAND BALLROOM



Gunnar Hood

WSI Summit Digital Marketing

Leveraging Technology to Uncover and Accelerate Opportunities

Explore the transformative power of technology in today's dynamic real estate landscape including utilizing LinkedIn as a powerful tool. Discover cutting-edge AI-driven tools and platforms that can augment your LinkedIn presence, enabling you to identify potential leads, nurture relationships, and uncover hidden opportunities more efficiently than ever before. We will unlock the potential of LinkedIn and artificial intelligence to empower yourself and uncover opportunities efficiently, drive growth, and achieve new levels of success.

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2023 COMMERCIAL REAL ESTATE SUMMIT SPEAKERS & SESSION TOPICS

9:50 AM – 10:40 AM SESSIONS

Room: Carl Albert Room 300

POLICY TRACK: Asset Management Issues Related to Out of State Ownership



Undercapitalized, out of state owners are causing a problem for Oklahoma multifamily properties. A panel discusses issues and potential policy initiatives to ensure our housing stock is maintained and our most vulnerable renters are protected.

Moderator: Bert Belanger, PACE Equity

Panelists:



Elaine Nelson-Lewis,
City of OKC



Larry Stein,
OK County Assessor



Mickey Dollens,
OK House of
Representatives

Room: Mary Fallin Room 304

FINANCING TRACK: HOME ARP Funding



Oklahoma has received \$32M in HOME American Rescue Plan Funding. A major focus of the program is non-congregate shelter for the homeless, such as hotels and motels. Learn how the funding will be implemented and how to use this resource in your next housing development or the types of properties to source for purchase.

Speaker: Darrell Beavers, Oklahoma Housing Finance Agency

Room: Robert S Kerr Room 301

PLANNING AND DEVELOPMENT TRACK:

Updated Statewide Housing Needs Assessment



The update to the Statewide Housing Needs Assessment is underway. Listen to the team working on the update, discuss how to navigate the new data and where housing will be needed most in the years to come. This information is critical for those looking to develop multifamily or single family neighborhoods.

Speaker: Shawn Schaefer, OU School of Architecture, PLACES LLC

Room: Henry Bellmon Room 314

BUSINESS BUILDING TRACK:

Mastering Effective Communication in Business

This interactive session offers valuable insights into the best business practices for building quality relationships. Learn practical strategies to quickly build rapport and trust and effective techniques for managing expectations.

Speaker: Kristopher Baker, Chicago Title Oklahoma



11:00 AM – 11:50 AM SESSIONS

Room: Carl Albert Room 300

POLICY TRACK: Revising the OKLTA



The Oklahoma Legislature is addressing resident concerns and eviction rates through proposed changes to the OK Residential Landlord Tenant Act. A panel discusses potential revisions that would ensure effective policy and protect property owners.

Moderator: Bryson Panas, OK Association of Realtors®

Panelists:



David Chapman, Ph.D., UCO, Realty 1 LLC, OK Real Estate Commission.



Grant Cody, Oklahoma Real Estate Commission



Sabine Brown, OK Policy Institute



Rep. Chris Kannady, OK House of Representatives

Room: Mary Fallin Room 304

FINANCING TRACK: Oklahoma Housing Stability Program



The legislature passed HB1031X during the special session this year, allocating \$215M for the creation of new financing programs for residential and multifamily developments. This session will cover how to apply for funding, important rules and deadlines.

Speaker: Darrell Beavers, Oklahoma Housing Finance Agency

Room: Robert S Kerr Room 301

PLANNING AND DEVELOPMENT TRACK:

New Urbanism Planning



This session examines the symbiotic relationship between Accessory Dwelling Units (ADUs), mixed use developments and thoughtful planning. Discover how strategic planning and zoning tools can foster inclusive, sustainable communities while addressing the pressing housing needs of tomorrow.

Moderator: Cassi Poor, Alliance of Economic Development

Panelist:



Marilyn Allen,
City of OKC



Mark Zitzow,
Johnson & Associates



Randy Entz,
City of Edmond



David Box,
Williams, Box, Forshee
& Bullard, P.C



Anthony Catania,
AMC Architecture

Room: Henry Bellmon Room 314

Business Building Track:

Cornerstones of Building a Business

This session is designed to empower business owners and aspiring entrepreneurs by providing practical advice and strategies for navigating the challenges and seizing opportunities in today's competitive marketplace.

Speakers:



Brad Willis,
First Fidelity Bank



Chris Griswold,
PC



David Mayfield,
Arledge CPA



Gunner Hood,
WSI Digital
Solution



Brad Traynor,
First Fidelity Bank



Bobby Stewart,
Insperty HR



LUNCHEON & KEYNOTE SPEAKER:
HART BROWN, FUTURE POINT OF VIEW
ARTIFICIAL INTELLIGENCE IN CRE

12:00 P.M. - 1:00 P.M.

IN THIS THOUGHT-PROVOKING KEYNOTE ADDRESS, BROWN WILL CAPTIVATE THE AUDIENCE WITH HIS DEEP INSIGHTS INTO THE TRANSFORMATIVE POWER OF AI TECHNOLOGIES WITH THE COMMERCIAL REAL ESTATE INDUSTRY. AS THE BOUNDARIES BETWEEN THE PHYSICAL AND DIGITAL WORLDS CONTINUE TO BLUR, AI HAS EMERGED AS A DRIVING FORCE, REVOLUTIONIZING VARIOUS ASPECTS OF THE CRE LANDSCAPE.

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2023 COMMERCIAL REAL ESTATE SUMMIT PIVOT AWARD WINNERS

UNIVERSITY OF CENTRAL OKLAHOMA HIGH UNIVERSITY CENTER GRAND BALLROOM - PIVOT AWARDS 1:00 PM - 1:30 PM

Attorney: Todd McKinnis, Rubenstein and Pitts



Todd McKinnis is a Partner at Rubenstein & Pitts, PLLC, an Edmond law firm. He graduated from the University of Oklahoma with degrees in Political Science and Law. Todd specializes in commercial, corporate, and real estate law, estate planning, and non-profit organizations. He's recognized as a top real estate attorney in Oklahoma. Todd represents businesses from formation to dissolution and is dedicated to helping entrepreneurs focus on their businesses. He has received numerous honors and serves on various boards, including the Oklahoma City Memorial Marathon and Anna's House Foundation. Rubenstein & Pitts, PLLC, is Edmond's largest law firm, providing personalized service to clients with a wide range of legal needs.

Noteworthy Projects and Practice Areas:

- Negotiated a significant private-public partnership for a 300-acre development in Edmond.
- Assisted with the establishment of Edmond's first comprehensive Tax Increment Financing District.
- Working on a multi-generational development project spanning 3000 acres of land in Oklahoma County. Collaborating with Edmond Planning.
- Department on zoning updates and addressing housing challenges. Representing multi-family developers to diversify housing options in the Oklahoma City Metropolitan area.



Appraiser: Darin Dalbom, NPVal



Darin Dalbom serves as the President of NPVal, LLC, bringing to the role over 30 years of proficiency in real estate valuation and consulting. He is renowned for his expertise in appraising mobile broadband communication towers, for which he has pioneered specialized report formats. Prior to establishing NPVal, Darin directed the Oklahoma City branch of a prestigious Fortune 500 valuation firm, with a primary focus on investment-grade offices and industrial properties, predominantly in Washington D.C.

An alumnus of Texas A&M University, Darin earned his Master's in Land Economics and Real Estate. He is a proud MAI-designated member of the Appraisal Institute and further enriches the academic sphere as an Adjunct Professor at the University of Central Oklahoma. With a certification as a general real estate appraiser, Darin's expertise is frequently sought in legal settings; he has provided testimony in numerous courts, including the U.S. Federal Bankruptcy Court in Oklahoma City. In addition to his illustrious career, Darin's commitment to the field is evident through his recent appointment to the Oklahoma Housing Finance Agency Board of Trustee for 2023.



**PIVOT AWARDS
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GARDNER TANENBAUM

Project Manager: Trait Thompson, Oklahoma State Capital Preservation Commission



Trait Thompson stands as a paragon in the realm of historical preservation, helping the Oklahoma Historical Society as its Executive Director since January 2021. Yet, the cornerstone of his legacy is the Oklahoma Capitol Restoration Project. Under his judicious leadership, a landmark once facing decay and neglect, featured twice on Preservation Oklahoma's "Most Endangered Places," was revitalized into a beacon of the state's history.

Endowed with bond issues amassing \$245 million, Trait guided an expansive restoration, entailing:

- Over 4,600 meticulous repairs to exterior limestone and granite.
- Revival of 21 miles of mortar joints.
- Restoration of 477 authentic steel windows.
- Waterproofing of the essential underground tunnel linking the capitol to the east parking lot.
- Installation of a new copper roof.
- Comprehensive infrastructure refurbishments, ranging from state-of-the-art electrical and HVAC systems to advanced security measures.
- The unveiling of a new museum, now Oklahoma's third-largest.

Before this monumental endeavor, Trait dedicated his skills as policy director for former Senate President Pro Tempore, Brian Bingman. Here, he honed his ability to understand the intricacies of the state's operations, diligently reviewing every senate bill and engaging with Oklahomans from all walks of life. Beyond tangible restorations, Trait enriches Oklahoma's historical narrative as co-host of "A Very OK Podcast." This platform, combined with his insightful dispatches in the "Mistletoe Leaves" newsletter, positions him as a foremost voice in celebrating and preserving Oklahoma's unique historical tapestry.



Public Official – Josh Moore, Edmond City Council



Josh Moore is the owner of Moore Quality Homes and Moore Quality Investments, focusing on real estate development and custom homebuilding projects. A graduate from the University of Central Oklahoma, Josh began learning the real estate business at the Edmond Economic Development Authority, then moved to a property management, commercial leasing and project management role at Edmond based Turner & Company for 16 years. As a community advocate and volunteer for several organizations, Josh ran for office and served as the Ward 2 Edmond City Council representative from 2019 to 2023. He and his wife Shannon reside in Edmond with their two children, Max and Olivia.

Proud Accomplishments While Serving In Office:

- Edmond's First Tax Increment Finance District projected to generate more than \$65 million in public improvements in Downtown Edmond.
 - Passing Oklahoma's First Development Tree Preservation Ordinance balancing future development with East Edmond's historic CrossTimbers Forest.
 - Coordinating the Arcadia Lake "Dream Team" and successful Arcadia Lake district Master Planning project.
 - Serving on the 2050 East Edmond study task force with an emphasis on balancing future density with rural development.
 - Creating a Low Impact Development Manual, Housing Needs Assessment, and overhaul of Edmond's Zoning and Development codes.
 - New Edmond City Hall, Municipal Court, Metropolitan Library and YMCA projects.
 - Representing Edmond and serving as Chair for the Association of Central Oklahoma Governments and ACOG MPO Policy Committee.
-

Development – Matthew Myers, Switchgrass Capita



Residing in the modern Prairie development near Arcadia, Oklahoma—a project he co-founded in 2016—Matthew Myers exemplifies passion for real estate that uplifts communities. An Oklahoma native, he shares a robust 29-year marriage with Kim, a former dietitian who now imparts English lessons to international students. The couple values faith, family, and the simple joys of life, including nature walks and heartfelt laughter.

Matthew's academic journey spans from Oklahoma State University to an MBA from Oklahoma City University. Sports, especially his fifteen-year foray into combat sports, played a significant role in his younger days. Now, he relishes hikes across Oklahoma, fly-fishing in Montana, and the artistry of Santa Fe. As a co-founder of the GiANT family of companies, he has significantly impacted business growth through his expertise in strategy and investments. Central to Matthew's life is forging meaningful connections, championing positive change, and nurturing lifelong friendships.

Pivotal contributions to the CRE Industry in Oklahoma

- The Lark
- The Ember
- 103 Broadway
- The Oxley
- Livedowntownedmond.com

CAREER FAIR, NETWORKING & EXHIBITORS

1:35 P.M. -2:25 P.M.

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2023 COMMERCIAL REAL ESTATE SUMMIT SPEAKERS & SESSION TOPICS

2:30 P.M. – 3:20 P.M. SESSIONS

Room: Carl Albert Room 300

POLICY TRACK: Development Taxes



Discuss the various types of taxes that can impact commercial real estate development, including property taxes, sales taxes, transfer taxes, and more. Learn practical guidance on how to navigate these tax obligations effectively while maximizing the available opportunities for tax savings and incentives. Hear the Impact of new beneficial ownership regulations on taxation of real estate ownership and development

Speaker: Jeff Trevillion, Crowe & Dunlevy



Room: Mary Fallin Room 304

FINANCING TRACK: Multifamily Bond Financing Part I

OHFA has a nearly unlimited amount of bond cap (\$500 to \$600 million) for multifamily housing bond developments across the state. Hear a technical overview of how the program works, how to build a team to qualify and the nuts and bolts of putting these types of deals together.

Speaker: Darrell Beavers, Oklahoma Housing Finance Agency

Room: Robert S Kerr Room 301

DEVELOPMENT TRACK: Mechanic Liens & Broken Priority



Gain a comprehensive understanding of how construction activities can affect the title of real property. Explore key triggers that may lead to the filing of mechanic liens and the potential repercussions and subsequent impact on property ownership.

Speaker: Jennifer Jones, First American Title

Room: Henry Bellmon Room 314

APPRAISAL TRACK: CRE APPRAISAL HOT TOPICS

A panel of appraisers discusses hot topics within the appraisal industry for different market segments. The presentation will include a case study on entity purchases vs real estate purchases in the multifamily industry.

Ace Appraisal Speakers:



3:40 P.M. – 4:30 P.M. SESSIONS

Room: Carl Albert Room 300

POLICY TRACK: Implementing Protect Duty: Enhancing Security at CRE Sites



Attacks on sites of commercial real estate have posed significant challenges to public safety and business continuity. In response to this evolving threat landscape, the U.K. has introduced the "Protect Duty," a comprehensive framework designed to enhance security measures and ensure the safety of personnel, customers, and assets within commercial properties.

Speaker: David McIlhatton, Institute for Peace and Security & Professor of Protective Security and Resilience, Coventry University, U.K.

Room: Mary Fallin Room 304

FINANCING TRACK: Multifamily Bond Financing Part II with PACE Financing: Expanding Your Capital Stack

This session will conclude the presentation on OHFA 4% Bond Financing, offering valuable insights into maximizing your financing options for multifamily projects. Informative and comprehensive session that delves into the dynamic realm of Multifamily Bond Financing Part II, featuring an exclusive spotlight on PACE Financing. The second half of this session delves into the dynamic realm of C-PACE Financing.

Speakers:



Bert Belanger,
Pace Equity



Darrel Beavers,
OHFA

Room: Robert S Kerr Room 301

DEVELOPMENT TRACK: Developers Panel



Seasoned, innovative developers will share their experiences, strategies, and lessons learned on developing commercial real estate. Gain valuable insights, network with industry leaders, and chart a course for success in commercial real estate development. Join us for a stimulating discussion that promises to inspire and inform developers, investors, and industry stakeholders alike.

Moderator: David Chapman, UCO, Realty 1 LLC, & OK Real Estate Commission

Panelists:



Todd McKinnis,
Rubenstein & Pitts PLLC
& OU Law



Steve Mason,
Mason Realty Investors



Jonathan Dodson,
Pivot



Matthew Myers,
Switchgrass Capital



Clay Coldiron,
Broadway Development
Group

Room: Henry Bellmon Room 314

APPRAISAL TRACK: Current Trends: CRE Cap Rates & Profit Spreads, Grow Facility Pricing



Delve into the dynamic world of the cannabis industry and current CRE trends. Hear a comprehensive analysis of the current CRE profit spreads and Cap Rate Trends. Discuss the impact of vacant grow facilities.

Speaker: Darin Dalbom, NPVal, LLC

NOMINATE FOR THE 2024 PIVOT AWARDS

BY CONTACTING MARKETING4CRESUMMIT@GMAIL.COM BY AUGUST 1, 2024!

SAVE THE DATE 10.16.2024

2024 CRE Summit

Please contact Dr. David Chapman, Director, UCO Real Estate Program, if you are interested in serving on the 2024 CRE Summit™ Board of Directors.

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The Commercial Real Estate Summit™ is co-sponsored through the courtesy of the UCO Real Estate Club.

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*Thank you for your
attendance at the
2023 CRE Summit!*

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Jack Werner, Lic#255

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FUTURE POINT OF VIEW



OHFA

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