



13th Annual
**Native American
Economic Development
Conference**

June 10th-11th, 2019

Pechanga Resort & Casino

Temecula, CA

Sign-up sheets for One-on-One Meetings will be made available at the registration desk. Delegates are encouraged to meet with our sponsors and exhibitors for one-on-one meetings throughout the event in a designated area. Sign-up sheets will be available starting on Monday, June 10th at the registration desk for you to schedule a time to meet. This is a perfect time to execute what you learn throughout the day so come prepared with questions. These meetings are completely voluntary and for all delegates who participate in a minimum of two (2) one-on-one meetings, **you will be entered into a raffle drawing where two winners will receive a \$100 AMEX gift card!**

7:30-8:30 AM

Registration & Networking Breakfast in Summit C



8:30-8:45 AM

Welcoming Remarks & Opening Prayer in Summit A



Raymond Basquez Jr.
Councilman
Pechanga Band of Luiseno Indians

Opening Remarks in Summit A



Justin O'Connor
President
Native Nation Events

General Session in Summit A

8:45-10:00 AM

Tribal Leaders & Business Executives Roundtable: How Effective Leadership, Successful Economic Development and Diversification Can Play a Crucial Role in the Health and Wellbeing of Tribal Members

- Growing and diversifying an economy requires tribal leaders to engage in critical deliberations to ensure economic growth will be financially successful.
- It is crucial to plan towards a progressive, diversified portfolio that allows tribes to spread the risk and development business ventures that will translate into jobs and economic security not only for tribal governments but also for their tribal members.
- We will feature leaders from successful gaming and non-gaming tribes who also operate franchise restaurants, sustainable energy resources, manufacturing, office digital solutions business, agriculture hospitality, printing, marketing, construction management, IT, personnel services, telecommunications, healthcare, waste management as well as security and defense industries to name a few. All of which provide sustainable, non-gaming revenue and opportunity to their tribal membership.
- What was the process? What are some of the hurdles faced? Tribal laws, regulations, qualified workforce and land use all come into play, not to mention financial resources.
- The importance of a complimentary and consistent revenue streams beyond traditional business. We will hear firsthand how these businesses have been created and why.
- Why building a partnership between Tribal Council, CEO/Executive Director's, CFO and HR department is critical for the success of the overall operation and therefore success of the tribe.
- Today's leaders will share what they think tomorrow's leaders need to know to adapt to changing economic and environmental conditions to preserve and grow their ventures so future generations can continue to thrive.
- Hear firsthand how the success of these tribal endeavors has led directly to improved healthcare, housing, education and other essential services needed by its members.

Moderator:



Derrick Watchman
President
Sagebrush Hill Group LLC

Presenters:



Mark Fox
Chairman
MHA Nation- Three Affiliated Tribes of the Fort Berthold Reservation



Robert Miguel
Chairman
Ak-Chin Indian Community



Richard Sneed
Principal Chief
Eastern Band of Cherokee Indians



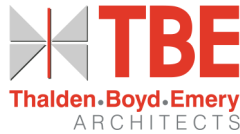
Jared Munoa
President, Board Officer
Pechanga Development Corporation



David Greendeer
Business Director
Ho-Chunk Nation

10:00-10:30 AM

Morning Networking Break in Summit C



10:30 AM

Economic Development General Sessions in Summit A

10:30-11:30 AM

Developing a Master Plan & Creating Sound Business Strategies to Greatly Improve the Chance of Successful Economic Development Projects

- Who are the players internally and how does a tribe go about obtaining help from outside the tribe?
- What are the various components and their importance within a Master Plan such as a Land Use Study, and how this can save a tribe money on future projects, expansions and even financings?
- Understanding the difference and importance of building a sustainable economy VS. just relying on specific projects or land development initiatives.
- Hear why it's important for tribal leaders to be visionaries and think of each project that will eventually lead to what should be a tribe's goal of developing a sustainable community for their members to thrive.
- How can a comprehensive Tribal master planned community incorporate both economic development, housing development and other governmental essential services to meet the needs of your tribe?
- The importance of keeping your tribal community informed and engaged in the planning process and the headaches it can save you in the long run.
- What steps or vetting system should a tribe create to ensure they are obtaining the best professionals for their projects?
- We will hear first-hand of lessons learned and challenges to overcome during the development and implementation stage of various size and types of economic development projects.

Moderator:



James Klas
Founder and Principal
KlasRobinson, Q.E.D.

Presenters:



Dennis Johnson
Chief Investment Officer
Ho-Chunk



Chief Boyd
Chief Executive Officer & Principal
TBE Architects
(Thalden Boyd Emery)

Economic Development General Session in Summit A

11:30-12:30 PM The Importance of Establishing an Economic Advisory Committee to Help Ensure You have the Proper Framework in Place for Your Project and to Protect Your Sovereign Immunity

- Why is a tribe better off creating a tribal economic advisory committee apart from the council?
- What are their responsibilities and benefits of that committee?
- What checks and balances need to be in place to ensure decisions are always being made with the best interest of the tribe in mind and not individuals?
- Does your tribe have the proper legal infrastructure necessary to fulfill the requirements of your project?
- What laws and institutions need to be in place, such as commercial codes, business organization codes, land use laws and even planning and zoning laws? What are their meanings and how do you go about establishing them?
- Is there an ideal business structure that a tribe should adopt to maximize their return while also protecting their interest? What are the pros and cons of this decision when it comes to investors and possible state and federal taxation?
- Why it is important to understand the legal ramifications when entering into a contractual relationship between sovereign nations and private business enterprises.
- The importance of understanding the various advantages that can be afforded to tribal owned enterprises in the form of loans, grants, government contracts and classification.
- Identify the optimal business structure to maximize revenue while protecting your interests.
- What are the pros and cons of setting up a Section 17 Corp approved by the BIA vs. establishing your own tribally-chartered corporation?

Moderator:



Linda Roe
Vice President, Client Development
TBE Architects (Thalden Boyd Emery)

Presenters:



Melvinjohn Ashue
Vice Chairman
Hoh Tribe Business Committee



Jason Lambert
Chairman of the Board of Directors
Twelve Clans Inc.

12:30-1:30 PM

Networking Lunch in Summit C

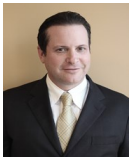


Economic Development General Session in Summit A

1:30-2:30 PM Investing in the Financial Market

- What is the economy telling us now?
- U.S. investor markets, where are they heading and how should tribes be investing for the long term?
- How do tribes best diversify their investments?
- How have nontraditional/alternatives diversified their investments?
- How can tribes weather the current volatility in the markets (i.e. The “tweet affect”).

Presenters:



Bernard Machlovitch
Executive Director
Morgan Stanley Private
Wealth Management



Hans Maentz
Senior Vice President
Morgan Stanley Private
Wealth Management

Jim Paulsen
Regional Vice President
Guggenheim Investments

2:30-3:00 PM

Afternoon Networking Break in Summit C



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Economic Development General Sessions in Summit A

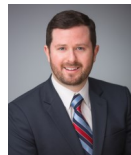
3:00-4:00 PM Capital Construction Audits – Management and Audit of Construction Costs

- Common construction program exposures and cost implications.
- Best practices for addressing constructing program exposures.
- Approaches for monitoring labor, equipment, and change orders.
- Guidelines for program construction controls assessments and audits.
- Expected savings from utilizing an outside cost auditor.

Presenters:



Amy Delaney, CPA, CFE
Construction Audit Manager
Moss Adams



Steve Bacchetti, CPA, CIA, CCA
Senior Manager
Moss Adams

4:00-5:00 PM Using New Market Tax Credits (NMTC) to Spur Economic Development: Step by Step

- This panel will cover the basics of the NMTC program and give you a better understanding of the language and basic concepts.
- New Markets Tax Credits are a flexible financing tool for Indian Country economic development projects.
- We will cover the basics of the NMTC program and how to best position your project to receive these credits.
- This panel will present the basics of the NMTC program alongside tribal developers who will give their own experiences using these tax credits.
- How can NMTCs can support economic development within healthcare, infrastructure, and hospitality?
- What are the compliance responsibilities for NMTC borrowers?
- What are the staffing needs for closing and compliance?
- What are any hurdles that you can face so you can be prepared for to avoid any potential roadblocks?

Moderator:



Phil Glynn
President
Travois

Presenters:

Sadie Valliere
Executive Director
Lac Vieux Desert Health
Center

Jack Ferguson
Business Council Member &
Management & Budget Chair
Confederated Tribes of the
Colville Reservation



John Lewis, Jr.
Chairman of Board of Directors
Gila River Utility Authority

5:00 PM

Monday's Sessions Conclude

7:30-8:30 AM

Registration & Networking Breakfast in Summit C



Economic Development General Sessions in Summit A

8:30-9:30 AM

Minors Trusts and Financial Literacy – Updates and Best Practices

- Structuring A Minors Trust Program that encourages educational pursuits.
- The latest legal and tax laws for Minors Per Capita Trusts.
- Strategies for coordinating the RAP and the Trust Agreement.
- How to make a financial literacy program work for your Tribal Nation.
- The best ways and means to teach financial literacy to Native American youth.
- Financial Literacy curriculum options.

Moderator:



Sam Fuller
Senior Vice President
Providence First Trust Company

Presenter:



Cornell Sankey
Chief Financial Officer
Kiowa Tribe

9:30-10:15 AM

Various Mechanisms to Accessing Capital for Tribal Economic Development Projects on the Reservation

- What is the traditional banking market looking like in Indian Country today?
- Prior to even starting to look for financing, a tribe and its hired consultants must create an economic assessment, cost-benefit analyses, feasibility study, project design and engineering. Obtain permitting, regulatory and environmental requirements and coordinate with other governments if necessary.
- Looking at all the various traditional as well as non-traditional financing mechanisms available, how does a tribe even begin to know how to go about creating an optimal financial package that fits their needs and project scope?
- What are the benefits of tax-exempt financing and the differences between loans, leases and bonds?
- What has been the outcome of tribes' reliance on federal funds through grants and low-interest loans to rebuild their infrastructure?
- What grants are available to support Tribal efforts to address pressing community economic development issues and what is needed to qualify and how to go about it?
- We will learn the various investor requirements depending on the type of investor whether it be in Capital Markets or private equity arena. What about Native American owned banks and lenders? Do they have different guidelines than traditional banks?
- What is Opportunity Zone Financing and can your tribe benefit from that?

Presenter:



Dr. Gavin Clarkson
Associate Professor at NMSU (on leave)
Former Deputy Assistant Secretary for
Policy and Economic Development-
Indian Affairs

10:15-10:45 AM

Morning Networking Break in Summit C



BLUE STONE
STRATEGY GROUP

Economic Development General Sessions in Summit A

10:45-11:45 AM Reparations: Overcoming Federal Policies on Pathways to Tribal Economic Development

Tribes have been the targets of systematic eradication by often contradictory federal policies and colonial tactics since the first contact with Europeans. The treaty-making era was followed by paternalism and the creation of the Bureau of Indian Affairs. That was followed by the allotment era, the Miriam Report, and the Indian Reorganization Act. The federal government then turned to termination and relocation and a means to erase tribes. Despite all of these policies, tribes have never received reparations from the United States for the destruction to their cultures, ways of life, and tribal economies caused by these federal policies.

- Provide a comparative analysis of the role of repatriations in rebuilding the economies of indigenous communities.
- Discuss the role natural resource and energy development plays in rebuilding tribal economies in spite of past and present day federal policies that hamper economic development.
- Describe the planning and strategies implemented to revitalize tribal economies in a tough economic climate through building on the traditional role of buffalo as a source of rebuilding traditional tribal economies.
 - ◇ Comparative examples of reparations to indigenous communities.
 - ◇ Overcoming prior and current federal policies in natural resource and energy development.
 - ◇ Strengthening, updating, and rebranding existing businesses in a tough economic environment and the role of the buffalo in that success.

Presenters:



Jeremy Patterson
Partner
Fredericks Peebles & Patterson LLP



Valentina Sireech
CEO
Ute Tribal Enterprises, LLC



Ronald Wopsock
Business Committee Member
Ute Indian Tribe of the Uintah and
Ouray Reservation

Economic Development General Session in Summit A

11:45-12:30 PM Strategic Planning: A New Vision for Tribal Economies

- Growing and diversifying an economy requires tribal leaders to engage in critical deliberations to ensure economic growth will be financially successful.
- Diversified portfolios allow tribes to spread risk and development ventures that translate into jobs and economic security.
- Discussions will focus on the ongoing Economic Development & Planning for Diversification.
- Participants will engage and discuss tools to improve current economic development and identify economic development areas of opportunity to plan for the future.

Presenters:



Jamie Fullmer
Chairman/CEO
Blue Stone Strategy Group



John Mooers
President
Blue Stone Strategy Group



Hellyaachwehay Quisquis
*SPEDC President/Principal
Executive Officer*
San Pasqual Economic
Development Corporation



Jason Mancini
Project Manager
Blue Stone Strategy Group

12:30 PM

Economic Development Conference Concludes

12:30 PM

EXHIBITOR RAFFLE DRAWING
Followed by
GRAND PRIZE DRAWING
In Summit A

*****Winners must be Present to Win*****