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Marquette University CENTER FOR REAL ESTATE

A Decade of Excellence

2019 NATIONAL REAL ESTATE STRATEGIES CONFERENCE

WITH MARY LUDGIN

September 12, 2019
Alumni Memorial Union



MARQUETTE
UNIVERSITY

College of Business Administration
Center for Real Estate

AGENDA

- 8:30 a.m. **Welcome**
Andy Hunt, *Director, Center for Real Estate (CRE), Marquette University*
Dr. Anthony Pennington-Cross, *Professor of Finance and Robert B. Bell, Sr. Chair in Real Estate, Marquette University*
- 8:35 a.m. **College of Business Update**
Dr. Joseph Daniels, *Acting James H. Keyes Dean of the College of Business Administration and Graduate School of Management, Marquette University*
- 8:40 a.m. **Panel: The Future of the Workplace**
Andy Hunt (Moderator), *Director, CRE, Marquette University*
Jason Geer, *Managing Director, Head of Dispositions and Financing, Invesco Real Estate*
Josh Jeffers, *President and CEO, J. Jeffers & Co.*
Kim Liautaud, *Managing Director, Head of US Commercial Real Estate, BMO Harris Bank NA*
Scott Marshall, *President & Chief Development Officer, Hana (a CBRE company)*
- 9:40 a.m. **Networking Break**
- 9:50 a.m. **REALM Network Update**
Kathryn Sugrue, *Mid-America Real Estate; President, REALM Network*
- 9:55 a.m. **Presentation: Using Real-time Analytics and A.I. to Drive Building Efficiency and Usage**
Pat Goepel, *Chief Executive Officer, Asure Software*
- 10:25 a.m. **Student Speaker**
Jack Jensen, *Senior; President, Marquette Commercial Real Estate Club*
- Keynote Introduction**
Ms. Michelle Panovich, *Senior Partner and Principal, Mid-America Asset Management; Chairperson, CRE Advisory Board, Marquette University*
- 10:30 a.m. **Keynote speaker: “The Times They Are A-Changin’: Views on the Four Major Asset Classes and the Future of the Workplace”**
Mary K. Ludgin, *Ph.D., Senior Managing Director and Director of Global Investment Research, Heitman*
- 11:10 a.m. **Fireside Chat and Q&A**
Kevin R. Smith, *Instructor of Practice, Marquette University; retired Senior Managing Director, Head of Americas at PGIM Real Estate*
- 11:25 a.m. **Closing Comments**
Dr. Anthony Pennington-Cross
- 11:30 a.m. **Conference Concludes**

KEYNOTE SPEAKER



Mary Lugdin | Senior Managing Director – Head of Global Research, Heitman
Mary is Heitman's Senior Managing Director, Head of Global Research and an equity owner of the firm. She is a member of the firm's Board of Managers, Global Management Committee, North American Private Equity Valuation Committee, and Private Equity and Debt Investment Committees. She is the author of numerous articles and research studies relating to real estate markets, portfolio management and strategy. Prior to joining Heitman, she was an urban planner for the City of Chicago and she worked in retail site location. Mary received an AB from Vassar College and an MA and PhD from Northwestern University. She is a Governing Trustee of the Urban Land Institute and sits on its Global Board of Directors. Mary also chairs ULI's Chicago District Council. Among other professional affiliations, she served two terms on the board of the Pension Real Estate Association and was its president. Mary is also a former president of the National Council of Real Estate Investment Fiduciaries. She was named a fellow of the Homer Hoyt Institute in 2000, is a docent for the Chicago Architecture Foundation and is a member of the board of the Metropolitan Planning Council of Chicago.

SPEAKERS



Jason Geer | Managing Director, Head of Transaction Services, Invesco Real Estate
Jason directs the legal and contract administration functions, and his responsibilities include negotiation of legal agreements, such as purchase and sale contracts and loan documents. He also controls due diligence management, including legal, environmental and engineering assessments, acting as a liaison with legal counsel. He is currently a member of all three of IRE's Investment Committees (equity, structured debt and financing).

Previously, Jason served as Managing Director and Head of the Disposition, Financing and Legal team, and has also held the roles of director of underwriting, dispositions officer and acquisition analyst. Jason earned a BBA in real estate and finance from Southern Methodist University.



Pat Goepel | CEO, Asure Software
Pat has more than 20 years of experience in the human resources outsourcing industry. Before joining Asure Software, he was president and CEO of Fidelity Investment's HR Services Division; President and CEO of Advantec; and Executive Vice President at Ceridian, where he was responsible for sales, marketing, operations and business development in the United States. As CEO of Asure, Pat is focused on building an end-to-end business model that ensures predictable bookings and revenue growth. A frequent industry speaker, Pat serves on the boards of Allover Media and SafeGuard World International, and also as the CEO of APPD Investments. Pat is a proud Marquette University alumnus.

SPEAKERS



Josh Jeffers | President and CEO, J. Jeffers & Co.

Josh founded J. Jeffers & Co. in 2012. Prior to forming the company, Josh worked in the private equity real estate industry, starting his career in the acquisitions department of Walton Street Capital in Chicago. Josh's transactional experience includes over \$1.4 billion of commercial real estate investments in U.S. and international markets, and spans office, retail, multifamily, industrial, hospitality, and mixed-use asset types. Josh earned a Master's Degree in Public Policy from the John F. Kennedy School of

Government at Harvard University, and a BBA in Finance and Real Estate from the University of Wisconsin-Madison.



Kim Liautaud | Managing Director, Head of US Commercial Real Estate, BMO Harris Bank NA

Kim joined the BMO Harris Bank CRE team in June 2012 as relationship lender on the private institutional lending team. Most recently she held the role of team lead for the Chicago mid-market and institutional commercial real estate lending teams. Prior to joining BMO Harris Bank, Ms. Liautaud worked at Merrill Lynch Capital in the commercial real estate group and spent 13 years at Heller Financial, Inc. Kim is a member of CREFC, and serves on the finance committee for SOS Children's Village Illinois. She graduated from Illinois State University with a BS in accounting.



Scott Marshall | President & Chief Development Officer, Hana (a CBRE company)

In October 2018, CBRE launched Hana, a new flexible space offering designed to meet the needs of enterprise and high growth occupiers. Hana's core offering is a plug-and-play flexible office solution that features occupier team suites (Hana Team), meeting and conference space (Hana Meet) and coworking space (Hana Share). Scott's career within CBRE has included numerous other executive and leadership positions, including serving as

Americas President Investor Leasing and as head of CBRE's Industrial & Logistics Services business in the Americas. Scott holds a bachelor's degree in Business Administration from Bradley University. He is a current member of the Society of Industrial and Office Properties (SIOR) and a past member of the Board of Directors of the National Associate of Industrial and Office Properties (NAIOP), Chicago Chapter.

SPEAKERS



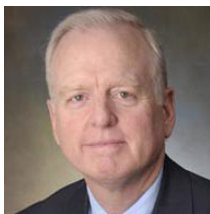
Andrew Hunt | Director, Center for Real Estate, Marquette University
Working closely with the real estate program faculty, Andy is responsible for carrying out the mission of the Center and oversight of all day to day administration of the Center's programs, activities and outreach. Prior to joining Marquette, Andy held roles in acquisitions with Real Capital Solutions (RCS) in Boulder, Colorado, investment and transaction management throughout the Americas with Prologis in Denver, Colorado and brokerage with UGL Equis (now Cushman & Wakefield) in Minneapolis, Minnesota. Andy received a B.S. and his MBA from Marquette University.



Michelle Panovich | Senior Partner and Principal, Mid-America Asset Management
Michelle is one of the Senior Partners of Mid-America Asset Management, Inc. Michelle holds a bachelor's degree in Business from Davenport University; an Associate Degree in Art from Grand Rapids Junior College, is a member of the International Council of Shopping Centers (ICSC) and Women in Retail Leasing (WIRL). Michelle also serves on the Marquette University Center for Real Estate Advisory Board (Chair 2019-present), the Marshall Bennett Institute of Real Estate at Roosevelt University in Chicago, Illinois, and the College of DuPage Foundation Board (past president).



Anthony Pennington-Cross | Robert B. Bell, Sr. Chair in Real Estate, Marquette University
Dr. Pennington-Cross joined Marquette in 2006, received tenure in 2009, and was named Bell Chair in 2018. He is also a nationally-renowned researcher and was a senior economist at the Federal Reserve Bank of St. Louis, senior economist at the Office of Federal Housing Enterprise Oversight in the Office of Policy and Research, director of research at the Research Institute for Housing America, and senior associate with Standard & Poor's. He holds a Ph. D. from The George Washington University in and a B.A. from Oberlin College. He completed a post-doctoral fellowship at the Zell & Lurie Real Estate Center at The Wharton School of the University of Pennsylvania.



Kevin R. Smith | Instructor of Practice, Marquette University; retired Senior Managing Director, Head of Americas at PGIM Real Estate (Prudential Financial, Inc.)
Kevin is Instructor of Practice in Marquette University's nationally-ranked real estate program, where he teaches the capstone real estate cases course. He retired in 2018 as managing director at PGIM Real Estate and Head of the Americas. Kevin has a bachelor's degree in economics and political science from Willamette University, and a master's degree in city and regional planning from Harvard University.

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The Center faculty and staff are always seeking help with job and internship placements, mentoring and shadowing opportunities for students, resume reviews and mock interviews, site tour leaders, Real Estate Club speakers and much more. Email Andy Hunt or Melanie Roepke to discuss getting involved: andrew.hunt@marquette.edu or melanie.roepke@marquette.edu

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Center for Real Estate Golden Eagle Gala

Friday, Nov. 8, 2019
Milwaukee, Wisconsin

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