



PENNSYLVANIA ECONOMIC DEVELOPMENT

INSTITUTE



# Pennsylvania Economic Development Institute and PEDA Present:

## *Introduction to Tax-Exempt Financing*



October 6, 2014

9:00 am – 12:15 pm

*Hershey® Lodge*  
325 University Drive  
Hershey, PA 17033

## INTRODUCTION TO TAX-EXEMPT FINANCING

In the world of economic development, bond financing is a valuable – though often underutilized – tool. Though a complex process, entities that choose to pursue it stand to benefit from long-term financing – typically at a lower cost – for purposes ranging from land and building acquisition to building renovation and new construction to acquisition and installation of machinery and equipment. Course participants will be introduced to this important tool in a setting that allows for the use of case studies and interactive discussion. This program aims to provide participants with an understanding of this foundational economic development finance tool by focusing on the following:

- explanation of tax-exempt financing
- types of tax-exempt financing
- project and borrower eligibility for tax-exempt financing
- the cast of parties involved in a tax-exempt deal and responsibilities of each
- the tax-exempt financing deal from beginning to end
- transaction documentation, rules and requirements

No matter your level of experience in designing economic development packages for your clients, the aim of this program is to introduce you to and familiarize you with the basics of bond financing and its role in helping you get projects done in your community. All economic development and finance professionals whose responsibilities include working with clients or financing programs will benefit from this program.

## PROFESSIONAL DEVELOPMENT UNITS

This event qualifies for 3.00 organizational PDUs (Finance) through the Pennsylvania Economic Development Institute (Institute).\*

## REGISTRATION INFORMATION

**Registration Fees:** The per person fee for PEDDA members is \$149 and for non-members is \$199.

**Cancellation & Refund Policies:** Due to venue guarantees, requests for cancellations and refunds must be made in writing and received by close of business September 26th. No refunds will be granted after that point. All refunds are subject to a \$50 administrative fee. No-shows will be billed in full.

**Questions:** Contact Joshua Skopp at (717) 441-6047 or [jskopp@wannerassoc.com](mailto:jskopp@wannerassoc.com).

## PRESENTERS

**Jonathan W. Cox** is a lawyer in Rhoads & Sinon's municipal finance practice group where he serves as bond counsel in connection with the financing of capital projects for municipalities, school districts and sewer and water authorities, as well as non-profit entities, including continuing care retirement communities, hospitals, colleges and fire and emergency medical service providers. Mr. Cox also assists clients with State and Federal funding programs, including those of PennVest, PEDFA, Commonwealth Financing Authority, PEMA and the U.S. Dept. of Agriculture Community Development and Rural Utilities Service.

Mr. Cox is a native of Central Pennsylvania: he grew up in Wellsboro, attended Dickinson College, where he graduated magna cum laude, and then the Dickinson School of Law, where he was a Dean's Scholar and the recipient of several honors and awards for his academic performance. Prior to entering the practice of law, Mr. Cox obtained a variety of academic, government and business experience teaching geology, consulting with the U.S. Geological Survey, and then planning and engineering fiber optic networks for an international telecommunications company.

**Kenetha Hansen**, EDFP, currently serves as Vice President, Business Development for the York County Economic Alliance (YCEA). Prior to the founding of YCEA in 2012 through an affiliation between York County's chamber and economic development organizations, Ms. Hansen had served with the latter since 1989. Ms. Hansen brings 25 years of economic development finance and incentive program experience including local, state and federal matching loans, tax-exempt financing, grants, tax abatement and credit programs. Ms. Hansen oversees YCEA's business development activities – including business attraction, retention and expansion – and leads the business development team comprising three Managers of Business Development, Expansion and Programs and Events.

Ms. Hansen earned her B.A. from Dickinson College and has been recognized – by the National Development Council – as a Certified Economic Development Finance Professional. She has served on the Board of the Pennsylvania Economic Development Institute since 2011, was a judge for Central Penn Business Journal's 50 Best Women in Business in 2008 and has volunteered with various other organizations over the past several years.

*\*A complete explanation is provided in the Guidelines for Certification of Economic Development Organizations (Guidelines) issued by the Pennsylvania Department of Community and Economic Development (DCED) and in the Institute's Policies and Procedures.*

**INTRODUCTION TO TAX-EXEMPT FINANCING****October 6, 2014****REGISTRATION FORM**

**Attendee Information:** *One registration per form. For additional registrations, copy this form or download additional forms from [www.peda.org](http://www.peda.org). All requested information is required.*

Full Name	Title	
Company		
Address		
City	State	Zip
Phone	Emergency Phone	
Email	Fax	

**REGISTRATION**

Online registration will remain open through COB on September 30th. If you wish to register after this date, please bring a check with you on the date of the event. Please select a registration option below.

- ☐ **PEDA Member - \$149**  
☐ **Non-Member - \$199**

**Total Amount Due \$** \_\_\_\_\_

- ☐ **Payment Enclosed**  
☐ **Check requested/will follow in the mail**

**PAYMENT**

1. **Check** – Download this form, complete required information and mail, with check made payable to **Pennsylvania Economic Development Association**, to 908 N. 2nd St., Harrisburg, PA 17102 or fax form to (717) 236-2046.
2. **Credit Card** – Go to [www.peda.org](http://www.peda.org) to register and pay by credit card for the event.

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