

## 2023 Legal, Compliance & Risk Meeting

Madison International Realty, 300 Park Ave., 3rd Floor, NYC | November 8

WEDNESDAY, NOVEMBER 8	
2:30pm	<p><b>Welcome comments: NAREIM Legal, Compliance &amp; Risk Committee</b></p> <p><b>NAREIM: IvyLee Rosario</b>, Meeting Director</p>
2:45pm	<p><b>Deep dive: Proposed &amp; final SEC rules</b></p> <p><b>Session leader: Jacqueline Kelly</b>, Partner, PwC  <b>Speakers: Alyssa Heim</b>, Managing Director, Kroll  <b>Pete Driscoll</b>, Partner, PwC</p> <ul style="list-style-type: none"> <li>Members will discuss the five new rules and two amended rules, in addition to the challenges and impacts these have on managers.</li> </ul> <p><b>Format:</b> 10-minute polling; 35-minute whole-room discussion</p>
3:30pm	Break
3:45pm	<p><b>Practical solutions for employee communications</b></p> <p><b>Session leader: Todd Joseph</b>, Chief Compliance Officer, Waterton  <b>Speaker: Eva Ciko Carman</b>, Partner, Ropes &amp; Gray LLP</p> <ul style="list-style-type: none"> <li>Members will share what technologies are being used for communication capture, manager considerations for building out their program, training and discipline.</li> </ul> <p><b>Format:</b> 15-minute presentation, 15-minute roundtable exercise, 15-minute best practices sharing</p>
4:30pm	Break
4:45pm	<p><b>What's on your mind?</b></p> <p><b>Session leader: Penn Stabler</b>, Senior Vice President, Clarion Partners</p> <p><b>Format:</b> 45-minute open-mic session of current challenges, lessons learned and what's to come.</p>
5:30pm	End of meeting

### 2023 LEGAL, COMPLIANCE & RISK COMMITTEE

NAREIM thanks the 2023 Legal, Compliance & Risk Committee members, including:

**Chair: Kara Brown**, Cabot Properties

**Co-Chair: Jeffrey Morandi**, Berkshire Residential

**Elena Branzburg**, Broadshore Capital Partners

**Corey May**, Cortland

**Michael Gershowitz**, Harrison Street Real Estate Capital

**Jacqueline Kelly**, PwC

**Todd Joseph**, Waterton

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For 30 years, NAREIM has been the home of real estate investment management benchmarking and best practice education. Our focus is on peer-to-peer networking, where the only conversations are candid and brutally honest. You come to NAREIM to understand what is working and what is not working among peers. NAREIM is where you understand what the industry is really thinking.

NAREIM represents 11 functional areas within the real estate investment management firm, providing in-person and virtual connections for each group throughout the year:

- Architecture, Engineering & Development
- Asset Management
- Capital Raising & IR
- Data & Information Management
- DEI
- Sustainability
- Executive Officer
- Legal, Compliance & Risk
- Marketing & Communications
- Portfolio Management
- Talent Management

NAREIM CALENDAR		
2023		
November 15	Bonus strategies for 2024	Virtual
November 28	Insurance strategies for 2024	Virtual
December 6–7	Capital Raising & IR	NYC
2024		
January 31	Portfolio Management dinner	NYC
March 5–6	Sustainability	Atlanta
March 27	Black Real Estate Roundtable	NYC
April 24	Latinx Real Estate Roundtable	NYC
June 5–6	Portfolio Management	NYC
June 5–6	Asset Management	NYC
September 11–12	Architecture, Engineering & Development	TBD
September 25–27	Executive Officer	Dallas-Fort Worth
October 8–9	Data & Information Management	Atlanta
October 23–24	Talent Management	Chicago
December 4–5	Capital Raising & IR	Austin

Please note, virtual meetings are organized at the request of functional group committees and will be scheduled through 2024. Please check the NAREIM website regularly for more details. [www.nareim.org](http://www.nareim.org)