



Little Traverse Bay Bands of Odawa Indians
7500 Odawa Circle, Harbor Springs, MI 49740

TRIBAL COUNCIL TRAVEL NARRATIVE

Submitted by: Treasurer Reyes

Training/Event: NAFOA 2016 Fall Finance & Tribal Economies Conference
Location: Charlotte, NC
Date of Event: September 19 & 20, 2016

Thank you fellow Council members and the Citizens of LTBB for allowing me the opportunity to attend the 2016 Fall Finance & Tribal Economies Conference. The following is a brief travel report/summary:

Sunday – September 18, 2016

Departed from Pellston airport at 6:45am destined for Charlotte, NC, arriving at noon without incident.
Pre-registration & Member Tribe Meeting/Reception

Monday – September 19, 2016

Day One – AM General Session

Opening Prayer & Cultural Enrichment:

Opening Prayer – Beckee Garris, Catawba Indian Nation Elder
Cultural Enrichment Provided by Catawba Cultural Preservation Project
Calling Song & Flag Song by Southern Eagle

Host Tribe Welcome – Bill Harris, Chief, Catawba Indian Nation
NAFOA Welcoming Remarks – Cristina Danforth, Oneida Nation, President, NAFOA Board of Directors
Honor Song for DAPL/Standing Rock by Southern Eagle

Conference Co-Chairs Remarks – Alan Gordon, Senior Vice President & Co-Director, Gaming Group, Bank of America Merrill Lynch

A Look Back: The Obama Administration Has Been _____ For Tribes

Moderator:

Richard Trudell, Executive Director, American Indian Resources Institute

Speakers:

Denise Desiderio, Policy Director, National Congress of American Indians
Aaron Klein, Advisor, NAFOA (4 years in Treasury Department)
Kim Teehee, Director of Government Relations, Cherokee Nation (1st Policy Advisor in Obama White House)

Preparing for the Post-Election Outcome

Moderator:

Philip Baker-Shenk, Partner, Holland & Knight LLP

Speakers:

Kay Hagan, former U.S. Senator (D-NC), Senior Policy Consultant, Akin Gump
Bill Paxon, former U.S. Representative (R-NY), Senior Advisor, Akin Gump

Executive Director Update

Speaker:

Dante Desiderio, Executive Director, NAFOA

Not For Sale: Finding Center in the Land of Crazy Horse

Speaker:

Kevin Hancock, President, Hancock Lumber Company

The Economic And Interest-Rate Outlook Into 2018: Some Early Guesses About the Post-Election Economy

Speaker:

Gary Schlossberg, Senior Economist, Wells Fargo Capital Management

Luncheon:

GEN-I Career Success Fellowship Sponsorship Opportunity

Speakers:

Cody Harjo, Education Coordinator, NAFOA

Erik R. Stegman, Executive Director, Center for Native American Youth, The Aspen Institute

Day One - PM Breakout Sessions

Active Due Diligence Part One: Five Questions Tribal Leadership Should Ask Before Starting a Project

Moderator:

Francisco J. Colon, CPA, CFE, Partner, Audit & Advisory Services, Macias Gini & O'Connell LLP

Speakers:

Matt Borkowski, Senior Consultant & Tribal ERP Lead, Arctic Information Technology

David Howard, CEO, TFA Capital Partners

Christine Swanick, Partner, Sheppard Mullin Richter & Hampton LLP

**Infrastructure – Does the tribe have the legal, physical and human infrastructure required for this project?*

**Markets – What is the problem this economic development project will solve? What is the target market and how much will they spend?*

**Goals – Is the primary goal of the project to generate revenue for the tribe or satisfy a social goal?*

Active Due Diligence Part Two: Five Questions Tribal Leadership Should Ask Before Starting a Project

Speakers:

Jenna Ara, Director, Golden Tree Asset Management LLP

Jonathan Leasure, Attorney, United States Securities and Exchange Commission, Division of Enforcement (comes in after something goes bad)

Richard Leibovitch, Managing Partner, Arel Capital

**Returns of Investment – How much financing will this project require for the initial investment, pre-opening, and during operations? What is the realistic return or jobs created for and investment? When do you grow, sell or cut losses?*

**Accountability – Who will manage and monitor the project for performance and financial expectations? Who within the tribe will monitor the managers?*

Tuesday – September 20, 2016

Day Two – AM General Session

Opening Prayer – Bill Harris, Chief, Catawba Indian Nation

Flag Song – Southern Eagle

Partnering for Economic Success: Tribal Economic Leadership Program (formed in 2006)



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Speaker:

Dr. Traci L. Morris, Director, American Indian Policy Institute, Arizona State University

Women Leading Nations

Moderator:

Christina Jimerson, Councillor, Seneca Nation of Indians, and 2nd Vice President, NAFOA Board of Directors

Speakers:

Elaine Fink, Vice Chairwoman (former Chair), North Fork Rancheria (*largest tribe in CA, 2100 members, 1400 adults, 366.5 acres in trust*)

Kay Rhoads, Principal Chief, Sac & Fox Nation "Don't compromise your values & integrity"

Cheryl Smith, Chief, Jena Band of Choctaw Indians (*1st female Chief in 1998, 364 members*) "Women support women!"

Cuba: Exchanging Culture and Ideas with a Proud and Resilient People (see slides)

Moderator:

Allison Binney, Partner, Akin Gump Strauss Hauer & Feld LLP

Speakers:

Beverly Cook, Chief

Maurice John, Sr., President, Seneca Nation of Indians

VaRene Martin, First Vice President, NAFOA Board of Directors

Eric Thompson, Chief, Saint Regis Mohawk Tribe

Financing the Next Generation of Health Care for Tribal Communities (see slides)

Moderator:

Dawson Her Many Horses, Member of Rosebud Sioux, Vice President of Global Commercial Banking, Bank of America Merrill Lynch, and Secretary, NAFOA Board of Directors

Speakers:

Fred Eoff, Director, PFM Financial Advisors LLC

Lacey Horn, Treasurer, Cherokee Nation

Jennifer Lerch, Business Programs Director of Rural Development, U.S. Department of Agriculture

NAFOA'S 9TH Annual Lifetime Achievement Awards Luncheon

Prayer – Chief Bill Harris, Catawba Indian Nation

Award Winners:

Chairman Arlan D. Melendez, Reno-Sparks Indian Colony

Vincent Armenta, Former Chairman, Santa Ynez Band of Chumash Indians

Day Two – PM Breakout Sessions

Treasury Management & Cash Decision-Making

Moderator:

Maria Smith, Chief Executive Officer, Smith Affiliated Capital

Speakers:

Cheryl Duke, Investment Officer, Mecklenburg County, NC Government (update annually)

Peter George, Partner, Macias Gini & O'Connell LLP

Robert Keller, Community Treasurer, Gila River Indian Community

Pete Wheeler, National Manager of Commercial Payments, KeyBank (operational improvement/technology)

"Institutes don't manage money, people do."

Tax-Free Alternatives to Per Capita Payments: The General Welfare Exclusion Act

Moderator:

Tasha Repp, NAFOA's GASAC Representative and Tribal Services Partner, Moss Adams LLP

Speakers:

Steven Garwood, Chief Financial Officer, Morongo Band of Mission Indians

Matt Gelfand, Managing Director, Senior Economist and Senior Investment Advisor, Rockefeller & Co.

Scott Layton, Chief Financial Officer, Rincon Band of Luiseno Indians

Nancy Lowery, President, FS Advisors, Inc.

LIFT – Let Indian Families Thrive

Investor Roundtable: Using Tax Credits to Spur Tribal Investment

Moderator:

Bill Cornelius, Consultant, Baker Tilly Virchow Krause, LLP (*Oneida of Wisconsin*)

Speakers:

Matthew Bland, Asset Manager, Travois

John Cataldi, Co-Founder, Native American Venture Fund

Amy Tranckino, Partner, Sheppard Mullin, Richter & Hampton LLP

Wednesday – September 21, 2016

Day three – Return travel from Charlotte, NC to Pellston, MI without incident, arriving as scheduled.

