



## AGENDA

### Chief Financial Officers (CFOs)

COMMUNITY OF PRACTICE

Thursday, May 29, 2025 ▪ 11:00AM – 12:30PM ET

**Description:** In a recent CFO peer exchange meeting, we discussed the potential policy changes that have already taken place in 2025 and those that may take place in the future. This meeting will focus on discussing approaches to evaluating and quantifying the impacts of policy changes as well as potential responses through scenario planning. We will also revisit a previous topic: mergers and acquisitions.

**Welcome:** Eric Chatman | EVP & CFO – HPN

#### **Discussion:**

##### Mergers and Acquisitions

*Discussion Starter:* Chris Cherry | Chief Financial Officer – Wesley Housing

##### *Discussion Questions:*

- Are you currently looking at or considering any merger/acquisition opportunities?
- What criteria do you consider most important?
- How are you evaluating the opportunities and risks?

##### Scenario Planning

*Discussion Starter:* Cheryl Read | Chief Administrative & Financial Officer – Champlain Housing Trust

##### *Discussion Questions:*

- How are you evaluating and quantifying the impacts of policy changes to date?
- How are you strategizing potential responses through scenario planning?

#### **Potential Topics for Future CFO Peer Exchanges:**

- AI and technology in finance
- Cash flow, rent collections
- Recruiting, retention, and succession planning
- Portfolio rationalization
- Fundraising, debt/capital strategies
- Other

#### **Wrap-Up:**

- Next CFO Virtual Peer Exchange: [Wednesday October 8th at 2pm ET](#)
- Fall Member Meeting | San Diego | December 3 – 5<sup>th</sup>