

## **G. Richard (Dick) Ambrosius**

*Strategist, Storyteller, Educator, South Dakota*



Dick serves a Vice President of Outreach and Group Programs for NeoCORTA Inc. NeoCORTA's mission is to empower adults of all ages with the tools they need to optimize their brain fitness.

NeoCORTA uses scientifically-designed assessments that incorporate predictive model forecasts for future brain fitness, and provides users with a road map to improve to maintain or improve their future cognitive health. The resulting report is unbiased, consumer-centered and provides guidance to encourage users to enjoy happier, healthier, more productive lives.

Ambrosius is on the "short list" of aging professionals that speak from decades of experience.

Dick began advocating for ageless marketing in 1981 by forming one of the first consulting firms to specialize in marketing to middle age and older adults. This led to his selection of South Dakota's selection as Entrepreneur of the Year in 1997 by *Entrepreneur Magazine*.

Dick has served clients in 49 states; educated and entertained thousands; conducted focus groups for and consulted with a wide variety of businesses, corporations, nonprofit organizations, associations and government agencies.

Dick began a career in aging services as Executive Director of an Area Agency on Aging in Northwest Iowa from 1976-1982. In 1980, he was appointed by President Ronald Reagan as the youngest member of the National Advisory Committee to the 1981 White House Conference on Aging.

In addition to authoring training manuals for clients, Dick is the author *Changes & Choices . . . a primer on life planning*, and *The Art of the Positive . . . tapping the power of an inclusionary vocabulary*.

## **Adriene G. Berg**

*Media Personality, Elder Lawyer, Financial Advisor, Lebanon, NJ*



Adriane G. Berg is the Emmy Award winning television host of "IRS Tax Beat." She is the host/creator of the nation's only show on longevity "Longevity Club Radio."

Adriane is money columnist for "Balance Magazine," and the author of over a dozen books on personal finance, including two best sellers – "Your Wealthbuilding Years," Newmarket Press, and "The Totally Awesome Money Book For Kids," Newmarket Press, which has been translated into Chinese, Japanese, and Korean. "How Not To Go Broke at 102: Achieving Everlasting Wealth," a John Wiley & Sons lead book, 2008, brought world wide acclaim as it explores personal and public issues regarding the mega trend of longevity.

Ms. Berg is a founder of the Academy of Elder Law Attorneys and served as Chair of the New York State Bar Association's Subcommittee on Estate Planning. She was recently named to the U.S. Treasury Greater New York Committee for Savings Awareness and is a former board member of the International Association for Financial Planners, among many professional organizations.

## **Jim Chapman**

*Jim Chapman Communities, Atlanta, GA*



Jim Chapman, founder and CEO of Jim Chapman Communities,

Inc. is an Atlanta native who began his real estate development and building career in metro Atlanta 10 years ago as a custom homebuilder. After a number of years in the custom home industry, Chapman realized the need for a different kind of product in the Atlanta market – active adult housing. Influenced by his father, a well-known Atlanta architect, Chapman set out to design and build his first maintenance free, active adult community in 2005.

During 2007 Jim Chapman Communities quadrupled its staff, began development of three new communities and Chapman was re-elected to the Board of the Fifty Plus Housing Council.

## **John Cromartie**

*Senior Demographer, United States Department of Agriculture, Washington, D.C.*



John Cromartie is Senior Demographer at the Economic Research Service, U.S. Department of Agriculture, where he oversees a program of research on rural migration, population distribution, and the effects of demographic change on rural well-being. He serves as a consultant to numerous government agencies on rural definitions used in federal programs. John is a member of the National Economics Council's committee on the National Broadband Plan and a visiting lecturer in the Department of Geography at George Washington University. He received a Ph.D. in geography from the University of North Carolina in 1989 and has been at the Economic Research Service since 1990.



## Andrew Evans

*Dirrection, Inc., Birmingham, AL*



Andrew Evans is the founding president and CEO of Provenance Digital, a Birmingham, AL-based web design and internet services firm. He also has been an instructor of web design and development classes at Samford University and Virginia College of Birmingham. Evans's firm has focused on specializes in website development; social media, email, mobile and search marketing; and online display advertising, website development, digital marketing and online advertising.

In September, 2010, Evans announced that Provenance Digital was merging operations with Dirrection Inc. to form Dirrection Digital Media. Evans is the founding president of Networking Birmingham, a website that aggregates the calendar/events information of all the chambers of commerce in the Birmingham area to promote networking opportunities in the business community. He was named to the *Birmingham Business Journal's* Top 40 Under 40 list.



## Helen Foster

*Foster Strategy LLC, New Orleans, LA*



Foster Strategy, L.L.C. is a marketing consultancy that emphasizes consumers 50 years of age and over. Helen Foster developed the firm in 2007, after a successful 13-year run with the major multinational communications firm, JWT, where she was partner and co-manager of the agency's 50+ consumer division.

Foster Strategy provides brand direction and marketing planning services, and helps to shape and refine product concepts to ensure relevance and marketability to 50+ consumers. Described by clients as a thinking partner and a good listener, Helen often collaborates with management teams to diagnose and resolve marketing weaknesses.

Helen's client experience includes Verizon, the State of Louisiana, Rancho Mission Viejo (Southern CA), Tuscan Village (Austin, TX), Bose, Retirement Living TV (RLTV), AARP, Galderma/Cetaphil, Oticon, Trilogy, ACTS Retirement-Life Communities, Willow Valley Retirement Communities (Lancaster, PA) and Lambeth House (New Orleans).

Helen is nationally regarded as an expert in age-qualified real estate, and she has served as a speaker, judge, advisor and editorial contributor for top industry organizations including the Urban Land Institute, NAHB's 50+ Housing Council, and the International Council on Active Aging (ICAA). Based in New Orleans, Helen is an officer on the Executive Committee for ULI Louisiana and serves as Communications Co-chair. She has been named among 50+ Builder's top 50 executives and is a member of David Wolfe's "ageless" insight-sharing group, The Society.

Helen graduated from Louisiana State University in 1991 with a Bachelor of Arts degree in Journalism/Advertising and a minor in Economics. Helen enjoys marathon training, biking and swimming and she and husband, Russ, have two children.

## Sherri Gothart-Barron

*GO TEXAN Certified Retirement Community Program, Texas*



Sherri Gothart-Barron has overseen the GO TEXAN Certified Retirement Community Program since March 2008. The program's main goals are to encourage the tourism of Texas and certified retirement communities for evaluation as a desirable retirement destination, relocation to Texas and certified retirement communities, the visitation of those who have chosen Texas as their retirement destination, as well as promoting business and development opportunities for the purposes of economic development. Since accepting the position, she has grown the number of certified retirement communities from nine to thirty-seven and installed marketing, public relations and training programs to support these communities effort to attract retirees.

## Joseph A. Gribbin, Ph.D.

*Dean, Masters' Program, Erickson School of Aging, College Park, MD*



Dr. Gribbin is a Professor at the Erickson School at the University of Maryland, Baltimore County – a school that integrates the study of aging, management & policy in its executive masters, undergraduate and custom education programs.

Dr. Gribbin has lectured extensively on global aging, retirement planning and the economic prospects for baby boomers, for older adults and for the nation as a whole. He is a leading expert on the nation's entitlement programs and their impacts across generations.

Prior to joining the Erickson School in 2005 and since 1987, Joe served as Associate Commissioner at the Social Security Administration. Earlier in his federal career, he held senior management and policy positions with 6 different departments of the executive branch as well as the US Senate.

At SSA, Dr. Gribbin oversaw the quality assurance and international programs for the Agency. As Associate Commissioner for International Programs, he successfully negotiated social security treaties (totalization agreements) with 7 nations including Japan and Mexico. He was elected by 39 nations to serve as Vice President of the Inter-American Social Security Conference and President of their Technical Commission on Administrative and Organizational Systems.

Dr. Gribbin holds a Masters Degree in Managerial Economics and a Ph.D. in Quantitative Economics from the Catholic University of America.

## Simon Hudson

*University of South Carolina, Columbia, SC*



Simon Hudson is the Center of Economic Excellence (CoEE) Endowed Chair in Tourism and Economic Development at the College of Hospitality, Retail and Sport Management, University of South Carolina, Columbia. He has held previous academic positions at universities in Canada and England, and has worked as a visiting professor in Austria, Switzerland, Spain, Fiji, New Zealand, the United States, and Australia. Prior to working in academia, he spent several years working in the tourism industry in Europe. Simon has written five books; *Snow Business, Sports and Adventure Tourism Marketing for Tourism and Hospitality: A Canadian Perspective, Tourism and Hospitality Marketing: A Global Perspective, and Golf Tourism*. The marketing of tourism is the focus of his research and in addition to the books he has published over 40 journal articles, and 20 book chapters. He is frequently invited to international conferences as a keynote speaker. His website address is [www.tourismgurus.com](http://www.tourismgurus.com)



## Terrence Llewellyn

*Llewellyn Development, Charlotte, NC*

Terrence Llewellyn has a long and distinguished background as a developer and consultant. His current company, Llewellyn Development is a real estate development and services company based in Charlotte, NC focused primarily on multi-family development, but also providing consulting and brokerage services to multi-family developers. His firm has developed a major project in Charlotte targeting baby boomers and empty nesters.

Terrence is a Marine, a Vanderbilt graduate and a private pilot.

## Tom Mann

*TR Mann & Associates, Baltimore, MD*



Tuesday Morning Sales Club co-founder Tom Mann is a recognized leader in the senior industry. The founder of TR Mann Consulting, a firm that specializes in developing and marketing retirement communities around the country, Mr. Mann and his team are knowledgeable on every aspect of building, advertising, selling and operating senior housing projects. A social media expert, Tom is also the co-founder of Mature Market Experts; a networking group formed for investors, retirement community, assisted living, and nursing home developers ... along with health and service professionals, publishers, and marketers serving the senior market. In addition, Mr. Mann serves on the Board of Advisors for the National Active Retirement Community Association, as well as the International Council on Active Aging's Visionary Board. He has been a keynote speaker at several conferences including "*Targeting Boomers and Beyond*" hosted by the International Mature Marketing Network and Market Research Global Alliance. As the managing partner of TR Mann Consulting, Tom has partnered with retirement communities, assisted living facilities, fitness programs, boomer and senior products, publications, and not-for-profit foundations. His team has managed and sold billions of dollars of real estate, with a settlement average four times faster than the industry average.

## Colin Milner

*Author, entrepreneur, public speaker and industry leader, Vancouver, British Columbia, Canada*



Colin Milner, founder and chief executive officer of the International Council on Active Aging® (ICAA), is one of the world's visionaries on the health and well-being of the older adult. The World Economic Forum has twice invited Milner to serve on its Network of Global Agenda Councils, recognizing him as one of "the most innovative and influential minds" in the world on aging-related topics.

Milner has been involved in the health and fitness industry since 1982. He managed large and small fitness clubs before founding Canada's first national fitness trade magazine, *Club Direct*, in 1990. Milner went on to become vice president of sales and marketing at Keiser Corporation, where he also served as chief operating officer of the Keiser Institute on Aging. Prior to establishing ICAA in 2001, he was president of IDEA

Health and Fitness Association.

An award-winning writer, Milner has authored more than 200 articles on aging-related issues. In addition, he has delivered speeches to thousands of business and governmental leaders, industry professionals, and older adults throughout the world.

Milner's efforts have inspired a broad spectrum of leading-edge publications, television networks and radio stations to seek his insights. Among these outlets are: *Wall Street Journal, Chicago Tribune, New York Times, Los Angeles Times, The National Post, Globe and Mail, CNN, CBC Radio, AARP, Newsweek, Parade Magazine, and Dow Jones Market Watch*.

## Dan Owens

*Publisher, Marketer, Real Estate Professional and Consultant, Charlotte, NC*



Dan Owens of Charlotte has been a publisher, marketer, real estate professional and consultant in the senior housing and care industry for 16 years.

An MBA graduate of the University of South Carolina, Owens founded a media company in 1993 called Senior Living Associates that has published senior magazines and provided marketing services for developers throughout the Carolinas.

Currently, Senior Living Associates is engaged in the following:

- Working with towns and communities seeking to attract retirees
- Working with and advising developers and operators in their plans to develop projects to serve the 55+ and retirement community age group. This includes brokerage, appraisal, market feasibility and consulting.
- Publishing a national award-winning magazine called *Retirement Lifestyles*.™ This magazine was judged last year as the 2nd finest 50+ magazine by the national Mature Media Awards program in Chicago. The associated website is [www.retire-south.com](http://www.retire-south.com).
- Serving as Executive Director of the 11-year-old National Active Retirement Association (NARA).

## John Randolph

*Lancaster Pollard, Atlanta, GA*



Senior living providers must make progress to stay viable and cannot always wait out turbulent markets. Mr. Randolph explains how “non-traditional” funding sources, including the Department of Housing and Urban Development (HUD/FHA), the Federal Home Loan Bank, Fannie Mae, and options such as bank-qualified bonds and Build America Bonds can help to finance expansions, renovations, acquisitions or new construction. Mr. Randolph is the primary point of contact for clients in North and South Carolina and is responsible for assisting health care organizations with bond financings, mortgage placements, debt capacity planning and interest rate risk management.

## Dave Reitz

*Howard R. Green Company, Chicago, IL*



Dave Reitz is the Director of Community Development for SEC Group, Inc., an HR Green Company and is based in Chicago, Illinois.

Dave graduated with a BLA from Kansas State University in 1985 and is a registered Landscape Architect in multiple states throughout the country. With over 25 years of experience in planning, land development and landscape architecture, Dave has worked as both a consultant and as a private community developer. Dave managed the Planning & Landscape Architectural group at Carter & Burgess in Dallas until 1998, and then moved to Chicago, Illinois to manage the landscape architectural amenity development for the Del Webb Corporation at Sun City Huntley, Del Webb’s first four-season community initiative. In 2004, Dave was asked to join the Active Adult Business Development team within the Pulte organization. This team was responsible for internal consultation and protection of the Del Webb brand name for all Del Webb branded communities throughout the country. His work included consultation on many communities throughout the Southeast, including Sun City Carolina Lakes in Charlotte, NC, Carolina Preserve in Cary, NC, Sun City Hilton Head in Hilton Head, SC, Del Webb’s Cane Bay in Summerville, SC, Villages at Deaton Creek in Hall County, GA and Sun City Peachtree south of Atlanta. After a 10 year career at Del Webb and Pulte Homes administering age-restricted, Active Adult projects throughout the country, he rejoined the consulting ranks at SEC in 2008.

## David J. Segmiller, AIA

*Principal, Director of Senior Living, FreemanWhite, Charlotte, NC*



Mr. Segmiller is a Principal and Director of the Senior Living studio at FreemanWhite. He brings over 25 years of experience in the design of award winning projects for seniors. Mr. Segmiller is a graduate of Miami University and holds a Master’s Degree in Architecture from North Carolina State University, and a Master’s Degree in Real Estate from Johns Hopkins University. He has taught and lectured extensively on the design and development of senior living environments. Mr. Segmiller is active within the Urban Land Institute (ULI), and is currently Chair of the Senior Housing Council.



## **Keith Tunnell**

*President, Lancaster County (SC) Economic Development Corporation, Lancaster, SC*

Keith Tunnell has been President of the Lancaster County Economic Development Corporation (LCEDC) for seven years. Lancaster County is located in the Charlotte Metro Region and borders south Charlotte, NC. During his tenure, Tunnell's office has been responsible for more than \$1.5 billion in new investment that includes industrial, office, headquarters, residential, tourism, retirement, and retail-commercial projects. Under Tunnell, LCEDC has helped create more than 10,000 new jobs and has diversified the local economy from one that was once totally dominated by textiles. A large part of the Economic Development Strategic Plan for Lancaster County includes enhanced amenities for attracting tourism and the continued development of amenities to attract retirement communities.



## **Gene Warren**

*President, Thomas, Warren + Associates, LLC, Phoenix, AZ*



Gene Warren, a founding member and President of TW+A, has thirty-four years experience as a professional economist. During the first half of his career he held faculty appointments in Economics and Management Science at several major research universities.

Dr. Warren also held a research appointment at the California Institute of Technology (Caltech) where he served as Senior Economist at the Jet Propulsion Laboratory (JPL). Prior to founding TW+A, he spent six years as an independent Consulting Economist, primarily to Members of the U.S. Congress and their staff.

Dr. Warren is a nationally recognized expert in the behavior and economic impacts of retirees. His work in this area has been used to shape both state and local policies affecting retirees, and is used by communities and active adult developments to position themselves as retirement destinations and to identify their target markets. As a result, he is a sought-after speaker on the latest trends in retirement. He has spoken at the 2002 Arizona Governor's Conference on Aging, the American Association of Retirement Communities, the National Active Retirement Association, the 2005 Joint National Conference on Aging, The Florida Council of 100, the South Carolina White House Conference on Aging, and the National Association of Real Estate Editors. Dr. Warren's research results have appeared in highly regarded, refereed academic journals as well as newspapers (e.g., *USA TODAY*, the *Christian Science Monitor*, and *The Wall Street Journal*) and periodicals (e.g., *Florida Trend*, *FastCompany*, and the *50+ Housing Magazine*).

Dr. Warren developed and has been the lead presenter at TW+A's half-day seminar, Marketing Your Community to Retirees, in communities across the country describing how they can use targeted marketing to attract relocating retirees. (This seminar was featured on NBC's Nightly News.) Also, as part of TW+A's efforts to understand the behavior of mature adults, Dr. Warren led the development of a set of proprietary, quantitative mature market research tools called SeniorStat™ that helps communities and developers identify target markets and the lifestyles that mature adults most likely to relocate to the community and/or development prefer.

Dr. Warren received a B.A. in Mathematics from Indiana University, and an M.S. and Ph.D. in Economics from Purdue University.