

# 11<sup>th</sup> Annual Illinois Financial Forecast Forum

## Speaker & Moderator Biographies

### *Sofia Anastopoulos*

**Executive Director and Chief Investment Officer,  
Illinois Metropolitan Investment Fund (IMET)**

Sofia Anastopoulos is the Executive Director and Chief Investment Officer of IMET. Sofia has spent her career working with the public sector in treasury and investment management, starting with the Government Finance Officers Association, where she was responsible for staffing its standing committee TIM committee, the committee that identifies and promotes best practices in treasury and investment management. She also served as editor of the GFOA TIM Newsletter and instructor for the GFOA and regional associations. She has written various publications on public sector investing. Since GFOA, she has worked in investment management and for her own firm, **Public Funds Consulting**, where she advised public sector entities in investment management best practices.

Sofia is a graduate of Northwestern University and received an MBA from DePaul University in Chicago. She holds the designation of Chartered Financial Analyst (CFA).

### *Jason Click*

**Senior Vice President, Meeder Investment Management  
President, Meeder Public Funds**

Jason Click holds a B.S. in Business Administration with dual majors in Finance and Risk Management from The Ohio State University, Fisher College of Business and is a Certified Financial Planner professional. He joined Meeder in 2009. With over 20 years of experience in the financial services industry, he serves as Senior Vice President of Meeder Investment Management and President of Meeder Public Funds. Jason oversees the strategic direction and management of Meeder's Public Funds and Wealth Management businesses and is a member of the executive team working to define growth and innovation strategies for the overall firm

### *C. Kelly Cofer*

**Founder and CEO, The Retail Coach**

C. Kelly Cofer founded The Retail Coach more than 20 years ago and continues to blend his expertise in retail real estate and corporate site selection with his knowledge of economic and community development to assist more than 600 communities across the U.S. in reaching their retail potential. As a recognized expert in finance, market research and analysis, urban and suburban retail, property development and redevelopment, Kelly's over 35 years of experience in the retail real estate

business are unmatched. The Retail Coach was born from Kelly's determination to see communities succeed and to give city leaders the knowledge and ability to recruit retail.

Kelly led the site selection for new stores and headed the rollout for national retail brands and restaurants as a commercial real estate broker in Dallas, Texas. His extensive experience includes national site selection in the corporate real estate department of a NYSE-traded national retailer leading market analysis and new market site selection.

Kelly attended the Economic Development Institute at the University of Oklahoma, holds a B.S. degree from Texas A&M University, and earned the prestigious Certified Commercial Investment Member (CCIM) designation from the Chicago-based Commercial Investment Real Estate Institute.

## *Stephen B. Friedman*

### **President, SB Friedman Development Advisors**

Stephen B. Friedman, FAICP, CRE – President is founder and president of SB Friedman Development Advisors, and brings over 40 years of experience in real estate and development advisory services. He is both a planner and real estate analyst, bringing a perspective on development sharpened by a concern for the creation of good communities (“place-making”) and the need for economic feasibility. Steve and his team focus on formulating redevelopment strategies and public-private partnerships for development using Tax Increment Financing, Business Districts, Special Service Areas, and New Markets Tax Credits for a wide range of projects. These include mixed-use projects, community facilities, downtown redevelopment, transit-oriented development, waterfronts, industrial expansions/revitalization and airport collateral development. Steve is registered with the SEC as a Municipal Advisor, and is a Counselor of Real Estate (CRE), a member of the College of Fellows of the American Institute of Certified Planners (FAICP), and a full member of the Urban Land Institute (ULI), where he has served in District Council and national leadership positions. He is also a director of The Civic Federation and of Family Focus. In 2013, Steve received the James Felt Creative Counseling Award of the Counselors of Real Estate for his development advisory role on The Shops and Residences of Uptown Park Ridge project. Steve holds a B.A. from Goddard College in Vermont and an M.S. in Urban and Regional Planning from the University of Wisconsin at Madison.

skilled at answering questions that are unique to the public sector, such as questions about compensatory time, 7(k) work periods, pay for canine handlers, and duty shift trades, to name a few. Ben was selected to the 2016 Illinois Rising Stars list. Only 2.5% of all attorneys in the State of Illinois were selected.

## *Benjamin Gehrt*

### **Attorney, Clark Baird Smith**

Benjamin Gehrt is a Partner in the law firm Clark Baird Smith LLP, where he focuses his practice on traditional labor law and employment litigation. He has experience in grievance and interest arbitration cases, contract negotiations, and unfair labor practice charges. Ben also represents clients in EEO and wage-hour litigation.

Ben has represented public and private sector clients in contract negotiations and interest arbitration. In those settings, he has helped clients obtain significant cost savings through changes in staffing levels, wage schedules, retiree insurance benefits, sick leave buyback benefits, and work rule changes, among other things.

Additionally, Ben has developed a niche practice at Clark Baird Smith LLP, counseling the firm's clients on a wide variety of wage and hour issues under both state and federal law. In addition to handling the traditional wage payment questions that arise with private sector businesses, Ben is skilled at answering questions that are unique to the public sector, such as questions about compensatory time, 7(k) work periods, pay for canine handlers, and duty shift trades, to name a few. Ben was selected to the 2016 Illinois Rising Stars list. Only 2.5% of all attorneys in the State of Illinois were selected.

## *Jason Headings*

**Senior Vice President of Public Funds and Director of Fixed Income,  
Meeder Investment Management**

Jason Headings holds a B.S. in Finance and a B.S. in Marketing from Miami University, Richard T. Farmer School of Business and is a Chartered Market Technician (CMT). He joined Meeder in 2006 and currently serves as Senior Vice President of Public Funds and Director of Fixed Income. As Director of Fixed Income, Jason is responsible for overseeing the fixed income strategies of the firm. As a Portfolio Manager of the Meeder Money Market Funds, he has been recognized five separate times for the Fund ranking highest in the United States amongst all market funds in its category.

## *Greg Kuhn*

**Interim Director, NIU Center for Governmental Studies  
Adjunct Faculty, NIU and Adjunct Lecturer Northwestern University**

Greg Kuhn has over 35 years of combined experience in government administration, consulting, and academics. In addition to serving at CGS for good portions of his career, Greg has also served in city management assignments as Village Manager in Clarendon Hills and Assistant to the Manager in Skokie, both Illinois communities in the Chicago area. Greg has also provided services to governments on a consulting basis as Director of Local Government Management Services at Sikich, LLP., Managing Vice-President of the PAR Group, and Sr. Associate in Governmental Services at Korn-Ferry International. Dr. Kuhn specializes in organizational development, design and training, strategic planning, leadership, urban management and public policy formulation. He serves as a lecturer/adjunct faculty member in NIU's Department of Public Administration and Northwestern University's Graduate Program in Public Policy and Public Administration. Greg earned a B.A. in Political Science from Marquette University and an M.P.A. and a Ph.D. in Public Administration and Political Science from Northern Illinois University.

## *Fran Lefor-Rood*

### **Senior Vice President, SB Friedman Development Advisors**

Fran Lefor-Rood specializes in real estate market analysis and development strategy, financial feasibility analysis, and public-private partnership finance. Her broad and in-depth understanding of housing - from national and regional housing market dynamics down to project-level feasibility - allows her to provide custom advice and assist clients in reaching their development and community goals. Her recent work includes leading a comprehensive Housing Needs Assessment for the City of Naperville and identifying policies and strategies to address a lack of housing types at a variety of price points. Fran also provided research and recommendations to promote affordable housing preservation and community control as part of the Elevated Chicago planning effort, and has structured financing for affordable and mixed-income projects for several non-profit developers.

Fran holds a Master of Urban Planning and Policy degree from the University of Illinois at Chicago and a Bachelor of Arts degree in Public Policy from the University of Chicago. She is a member of the American Planning Association, Lambda Alpha International-Ely Chapter, Council of Development Finance Agencies, The Goldie Initiative, Illinois Housing Council, and the Illinois Tax Increment Association. Fran is a Series-50 Qualified Municipal Advisor Representative.

## *Mary Ludgin*

### **Senior Managing Director and Director of Global Investment Research, Heitman Financial**

Mary Ludgin is Heitman's Managing Director, Head of Global Research and an equity owner of the firm. She is a member of the firm's Board of Managers, Global Management Committee, North American Private Equity Valuation Committee, and Private Equity and Debt Investment Committees. She is the author of numerous articles and research studies relating to real estate markets, portfolio management and strategy. Prior to joining Heitman, she was an urban planner for the City of Chicago and she worked in retail site location.

Mary received an AB from Vassar College and an M.A. and Ph.D. from Northwestern University. She is a Governing Trustee of the Urban Land Institute and sits on its Global Board of Directors. Mary also chairs ULI's Chicago District Council. Among other professional affiliations, she served two terms on the board of the Pension Real Estate Association and was its president. Mary is also a former president of the National Council of Real Estate Investment Fiduciaries. She was named a fellow of the Homer Hoyt Institute in 2000, is a docent for the Chicago Architecture Foundation and is a member of the board of the Metropolitan Planning Council of Chicago.

## *Rick Mattoon*

### **Senior Economist, Chicago Federal Reserve**

Rick Mattoon is a senior economist and economic advisor in the economic research department of the Federal Reserve Bank of Chicago. Mattoon's primary research focuses on issues that face the

Midwest regional economy. Mattoon began his career at the Chicago Fed in 1990. In 1997, he left the bank to serve as a policy advisor for economic development, energy and telecommunications to the Governor of Washington. He later served as director of policy and legislation for the Washington Utilities and Transportation Commission. He returned to the bank in 2001.

Mattoon's work has appeared in the National Tax Journal, State Tax Notes, Public Choice and Society. He is the co-author of a chapter on state and local governments and the national economy in the Oxford Handbook of State and Local Government Finance.

Mattoon serves on the Board of the Chicago Manufacturing Renaissance Council, the Advisory Committee to the Chicago Workforce Investment Council, the pension committee of the Civic Federation and is a member of the Joint Advisory Board of Economists to the Governor of Virginia. He also serves as a lecturer at the Kellogg School of Management at Northwestern University.

Mattoon received a B.A. from Kenyon College and an M.A. from the University of Chicago.

## *Elizabeth Schuh*

**Former CMAP Principal Policy Analyst and Project Manager of ON TO 2050  
Regional Plan, Special Project Manager, SB Friedman**

Elizabeth Schuh has a background in community and economic development, state and municipal tax policy, and transportation investment prioritization. Her work has centered on collaborative development of actionable recommendations across diverse stakeholder groups. Her experience at SB Friedman includes assisting governments in creating performance-based incentive policies, assessing the fiscal and economic impacts of new development, aiding regional entities in building economic resilience, and understanding and responding to the impacts of the COVID crisis. Prior to joining SB Friedman, Elizabeth worked for the Chicago Metropolitan Agency for Planning, where she led development of the ON TO 2050 plan. Lastly, Elizabeth co-chairs the board of the non-profit Rebuilding Exchange, giving her first-hand experience in the resources available to small businesses and non-profits during the COVID crisis.

## *Cynthia L Tomei, CAE*

**Vice President, Membership Growth & Engagement  
Illinois Manufacturers' Association**

Cynthia (Cindy) Tomei joined the IMA team in January 2017 after serving as president of a smaller manufacturing trade association for 10 years. She obtained her certification as an association executive (CAE) in 2016. Her strengths include public speaking, team building, member engagement, program development, revenue generation and servant leadership. She is a visionary strategist focused on continual improvement and her own personal development. She currently leads the Membership & Programming teams of the IMA and in a short time, the teams have increased member retention and engagement through developing relevant programming and enhanced outreach. In 2020, she was recognized as one of Crain's Notable Women in Manufacturing

and an Influential Women in Manufacturing Honoree. She was elected IMA Corporate Secretary in February 2019. Tomei serves on the board of 101 Best and Brightest Companies in Chicagoland.

## *Mike Wojcik*

### **Senior Vice President/Principal, The Horton Group**

Mike Wojcik is a Senior Vice President of The Horton Group, one of the region's largest privately-held insurance agencies specializing in Insurance, Risk Advisory and Employee Benefits. He joined Horton in 1989 as one of the founding partners of their benefit consulting and brokerage division. He is recognized as a thought leader in the industry.

Mike earned his Bachelor's degree from Roosevelt University and an M.B.A. from Lewis University. He received his Certified Financial Planner (CFP®) designation from the American College and is a Chartered Life Underwriter (CLU). He recently received A Professional Certificate in Public Finance from the University Of Chicago Harris School Of Public Policy and is currently enrolled in the Certified Employee Benefit Specialist (CEBS) program at the Wharton School of the University of Pennsylvania.

Mike has served on numerous advisory boards for insurance carriers and related healthcare industries. He currently serves on the Producer Advisory Committee of Anthem Blue Cross Blue Shield of Indiana. Mike is Co-Chair of the Illinois Independent Agents Working Group. He has testified several times to state legislative committees and co-authored several white papers on healthcare reform. He serves on the Governance Board of Advocate South Suburban Hospital for the past twelve years and Chaired for three.

At the national level, Mike is regarded as an industry expert. He is past chairman of the Big "I" National Health Care Task Force in Washington D.C. and now serves as the group's Health Care Liaison which supports their government affairs efforts on healthcare reform. The Big "I" is a national alliance of more than a quarter million business owners and their employees who offer all types of insurance and financial services products.

Mike speaks regularly on the challenges of healthcare to community, business and legislative leaders.

## *Carl Woodward*

### **Owner, Woodward & Associates, Inc.**

Carl Woodward is the owner of a CPA firm that specializes in automotive dealerships. He has been an automotive accounting specialist for over 30 years, prior to that he held the position of Office Manager/ Controller/CFO at a new vehicle dealership. He is also currently a Dealer/ Owner of an automotive dealership. His accounting firm has served over 300 dealerships nationwide including over 100 in Illinois.

Mr. Woodward's knowledge and expertise include areas such as Dealership Consulting, Valuations and Appraisals, Theft Studies, Compensation Consulting and Purchase and Sale of Dealerships. Carl has also served as an expert witness in over 20 legal cases.

Mr. Woodward co-authored the Automotive Accounting Manual for the American Institute of CPA's and currently publishes a monthly newsletter that is received by over 700 automotive dealers and managers. The Powersteering newsletter focuses on economic and financial information important to the automotive industry.

Carl is a graduate of the University of Illinois and is a member of the Illinois Certified Public Accountants, American Institute of Certified Public Accountants and the Auto CPA Group of which he is a past Chairman.