



ECONOMIC HOUSING FORECAST & EDUCATIONAL CONFERENCE

November 5 & 6, 2024 / Independence Event Center
6001 Rockside Rd., Independence, OH United States 44131

Register today at HBACleveland.com

PACKAGE OFFERINGS:

Days	Cost	Includes
All Days Package	\$399	<ul style="list-style-type: none">• Complete conference package, including course offerings and keynote speakers.• Continental breakfast and lunch provided both days
Day 1 Package	\$299	<p>Selection of:</p> <ul style="list-style-type: none">• Marijuana Legalization & Your Business Safety or Getting Out of the Bidding Process <p>AND</p> <ul style="list-style-type: none">• DG Interconnection Process - Solar Energy or Artificial Intelligence <p>AND</p> <ul style="list-style-type: none">• Hidden Benefits of Title Insurance Endorsements or 4 Ways to Retire from your Business <p>Lunch included</p>
Day 2 Package	\$249	<p>Selection of:</p> <ul style="list-style-type: none">• Estimating: The first line of defense for profits & Economic Housing Forecast Luncheon w/ Ivy Zelman (8:00 AM - 2:00 PM) <p>OR</p> <ul style="list-style-type: none">• Keynote Speaker Luncheon Package: Jim Bouchard & Ivy Zelman (10:00 AM - 2:00 PM) <p>Lunch included</p>
Vendor Tabletop & Builder Speed Meeting	\$600	<ul style="list-style-type: none">• 4 minute Speed Meeting with Top HBA Builders• Company Profile in Builder / Vendor Directory• Complimentary ticket to Economic Housing Forecast Luncheon• 5' Table & Chair, Linens / On-site Signage /• List of attendees & contact information <p>Lunch included</p>
CAPS Certification	\$799	<ul style="list-style-type: none">• CAPS I & CAPS II courses led by Golden Age Living• Continental breakfast and lunch provided both days• Access to attend Economic Housing Forecast Luncheon <p>Lunch & continental breakfast included</p>

Educational Conference Course Descriptions

Tuesday, November 5, 10 AM - 11:30 AM (Select one)

<p>Marijuana Legalization & Your Business Safety</p> <p><i>Speaker: Keenan Jones</i></p>	<p>Keenan Jones, Partner, Frantz Ward will join us to discuss the overall impact of legalized recreational marijuana in Ohio and how you can protect your employees and your business.</p>
<p>Getting Out of the Bidding Process</p> <p><i>Speaker: Erik Anderson</i></p>	<p>Are you often one of three or four 'bidders' on a remodeling project? Are you doing a lot of work to develop a price only to have a customer never get back to you? This seminar will show you how to get out of the bidding process, so you work with clients who want to work with you.</p>

Tuesday, November 5, 11:45 AM - 1:15 PM (Select one)

<p>DG Interconnection Process – Solar Energy</p> <p><i>Speaker: First Energy</i></p>	<p>A high-level review of the application submission process and technical requirements will be provided to aid customers interested in interconnecting small generation with the company's distribution system.</p>
<p>The AI Revolution: Unlocking the Future of Tomorrow</p> <p><i>Speaker: Chuck Gallagher</i></p>	<p>Are you ready to unlock the full potential of AI for your organization? Join us to demystify this game-changing technology and explore the possibilities it holds. Our live AI application demonstrations, including ChatGPT, Perplexity, Gemini, Veed.io, and many more will give you a firsthand look at what's possible.</p>

Tuesday, November 5, 1:30 - 2:45 PM (Select one)

<p>Hidden Benefits of Title Insurance Endorsements</p> <p><i>Speaker: Kate Grady</i></p>	<p>The class will discuss endorsements to ALTA title insurance policies; what coverage they add and how to get them. The attendees will learn how to maximize their title insurance coverage and minimize their risk. We will cover the various types of endorsements available including those that insure over known risks like encroachments and endorsements that expand coverage to include zoning and other common concerns.</p>
<p>Four Ways to Retire from your Business</p> <p><i>Speakers: Action Coach, Peg & Pete</i></p>	<p>Business Owners have options to retire from their business, other than work well into their retirement years, or just simply shut the doors as the majority of Business Owners in the country do.</p> <p>Peg & Pete will take the participants through 4 options for succession, options that not only allow the Business Owner to retire, but to preserve their legacy.</p> <p>Learning Objectives include:</p> <ul style="list-style-type: none">• Participants will explore four paths to exiting their business as they retire.• Attendees will discover the advantages and disadvantages of each of the four paths to retirement.• Participants will learn simple ways to preserve their legacy in their business after they retire.

Wednesday, November 6: (**Select one**)

8 AM - 12:00 PM

Estimating:
*The first line
of defense
for profits*

Speaker:
**Erik
Anderson**

This half-day course will focus specifically on Estimating. The ability to effectively prepare for a project is vital to your success. Project preparation consists of multiple processes that work together and, when performed effectively, increase your efficiency and profitability, improve client satisfaction, and enhance team and vendor relationships. Come away with the knowledge and skills to perform one of the critical processes in project preparation: estimating costs.

As a graduate of this course, you will be able to:

- Illustrate how estimating works to assist in effective project set up.
- Identify the fundamentals of estimating to identify the costs (not the selling price).
- Use spreadsheets and packaged estimating systems.
- Identify techniques for estimating in an ever-changing market.

10 AM - 11:15 AM

**Keynote
Speaker:**
**Jim
Bouchard**

*Inspire /
Empower /
Guide:
Essential
Disciplines
for Today's
Leader*

More than ever, it's not "just about the money" when it comes to attracting and holding on to top talent. People are going where they know their leaders care, where their work has meaning, and they have a real chance to learn, grow and develop. In this engaging and interactive session, your audience will confront today's toughest leadership challenges – head on.

- Attract - and KEEP - the best people in this fast-moving environment
- Cultivate leaders at ALL levels - regardless of title or position. Your front-line people are the face of your organization, and your customer's first impression!
- Learn why human-centric leadership is critical in the ever-growing world of AI
- Connect people to PURPOSE – not just a job
- Engage people in the face of uncertainty

CAPS Certification

Tuesday & Wednesday, November 5 & 6

Marketing & Communicating with the Aging in Place Client (Caps I)

Learn best practices in communicating and interacting with the 50+ population, and take advantage of one of the fastest growing market segments In remodeling and related Industries.

As a graduate of this course, you will be able to:

- Explain the three segments within the Aging in Place market that present business opportunities for building professionals
- Implement a process for promoting new opportunities for products and services in the Aging in Place market
- Enhance your sales process with effective techniques for the Aging in Place market

Design Concepts and Methods for Livable Homes and Aging in Place (CAPS II)

This Certified Aging in Place Specialist (CAPS) course will help you understand the guidelines and requirements of accessibility, learn the importance of doing an assessment with input from occupational and physical therapists as well as qualified health care professionals. Good design in making modifications can transform a house into a safe, attractive, and comfortable home for life.

As a graduate of this course, you'll be able to:

- Describe the home ownership market as it relates to the three segments of the Aging in Place market
- Consider contractual and legal concerns for building professionals providing design solutions to the Aging in Place client
- Perform a needs assessment to identify and prioritize the needs, wants and wishes of the Aging in Place client
- Recommend specific design solutions for the Aging in Place client
- Estimate and schedule the Aging in Place project while regarding special considerations
- Identify considerations for executing the job while the client is in residence

*****To complete CAPS certification, you must complete CAPS III offered virtually following CAPS I & II. Additional fee applies.*****

Builder Speed Meeting Tabletop

Wednesday, November 6

Are you looking to expand your network and grow your business in the industry? Don't miss out on the opportunity to purchase a tabletop at our upcoming Builder Speed Meeting. This event is the perfect chance to connect with other HBA Builders & Remodelers, showcase your services, and build relationships.

Secure your booth now and take your networking to the next level at the HBA Builder Speed Meeting!

Details:

- Four minute Speed Meeting with Top HBA Builders & Remodelers Company Profile in Builder / Vendor Directory
- Complimentary ticket to Economic Housing Forecast Luncheon 5' Table & Chair, Linens / On-site
- Signage / List of attendees & contact information
- Lunch included
- \$600 to register

Economic Housing Forecast Luncheon

Wednesday, 11:30 AM - 2 PM



Ivy Zelman is Executive Vice President of Zelman & Associates holding roughly 30 years of experience covering housing and housing-related industries. In 2007, Ivy co-founded Zelman & Associates. The firm provides analyses across all aspects of the housing spectrum. Ivy's concept for the firm remains strongly rooted in the ability to perform thematic research overlaid with proprietary surveys to produce unparalleled differentiated value-added research.

Ivy has been widely known and respected for her bold thinking and accurate assessments where others failed, helping industry players avoid costly mistakes and capture game-changing opportunities. In 2005, she called the top of the housing market. Ivy famously asked Toll Brothers CEO Bob Toll on the Q4 2006 Toll Brothers conference call "Which Kool-Aid Are You Drinking?" From there Ivy called the bottom of the housing market in January 2012, thus reinforcing her dominant reputation within the industry. She helped best-selling writer, Michael Lewis with research related to the mortgage crash. This became a part of his best-selling book turned movie, *The Big Short*. Michael wrote in the book "all roads led to Ivy."

Her convictions have been recognized by Institutional Investor ranking her as one of the most preeminent figures within the housing industry. Most notably, Institutional Investors - America Research Team rankings placed Ivy and her team with eleven 1st place rankings and Hanley Wood, a leading real estate media firm, ranked Ivy as 14th of the Top 50 most influential persons in housing. For the past three years, Ivy has been included in Barron's 100 Most Influential Women in U.S. Finance. As one of the most powerful women on Wall Street, Ivy Zelman is a sought-after expert on the housing sector, and what the overall housing market means for investors, homebuilders, industry executives and the economy at large.