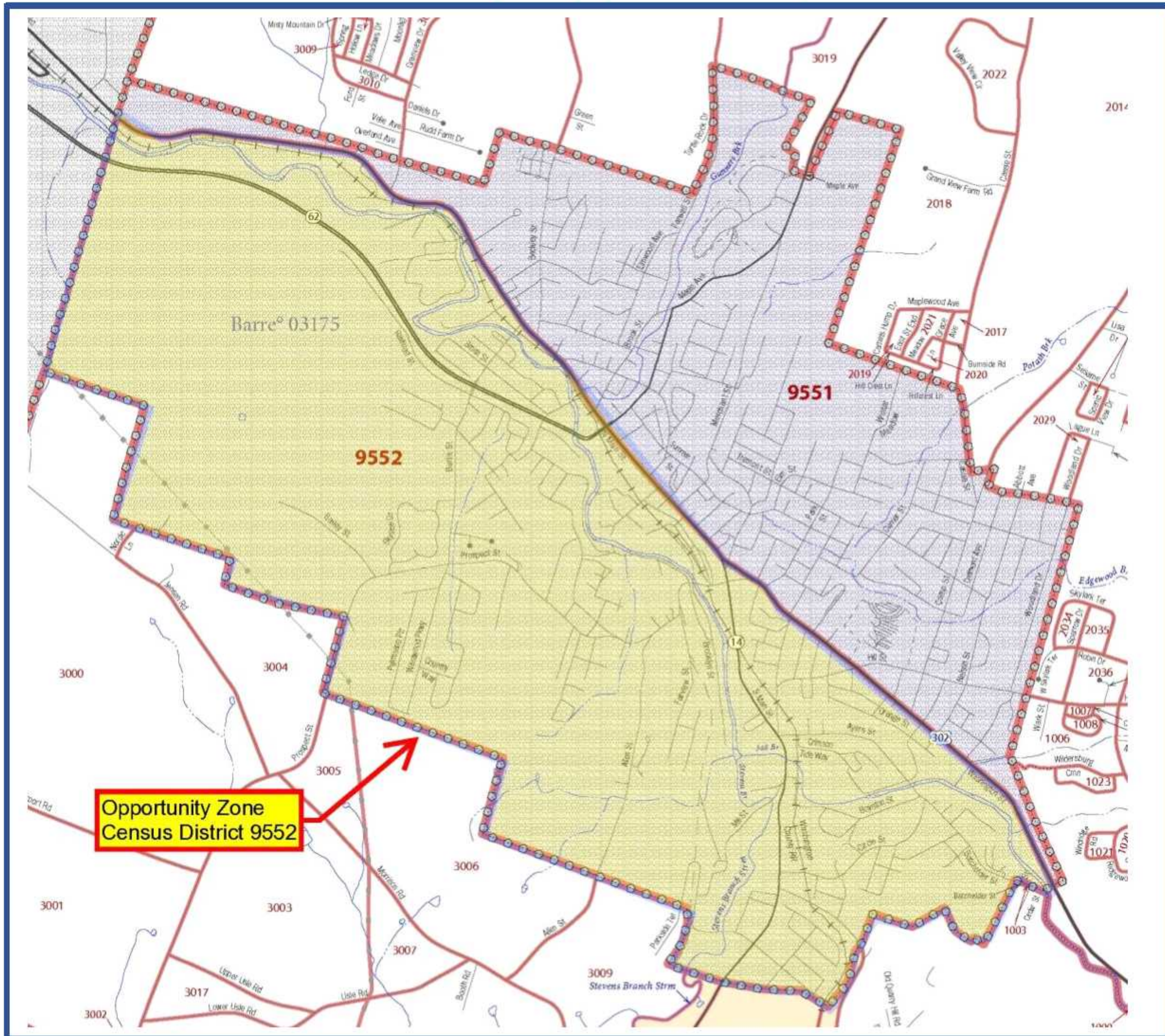


Do you own a Business or Property in The Barre City Opportunity Zone?



If you do, there may be financial planning and investment “opportunities” for your business or property! Are you interested in knowing about:

- Incentives for investing in real estate or making facility improvements?
- Selling your business or finding investors for it?
- Deferring capital gains taxes on the sale of assets if invested in the Opportunity Zone?
- Planning or improving your “Exit Strategy” for retirement?

To Learn more, attend the Opportunity Zone Forum, November 8th, information attached.

OPPORTUNITY ZONE FORUM CITY OF BARRE

NOVEMBER 8TH, 2018 2:00 – 4:00 PM
BLANCHARD BLOCK, 3RD FLOOR



RSVP with
Joel Schwartz

jschwartz@badc.com

802-476-0660

INTRODUCTIONS:

Mayor Lucas Herring
City of Barre

OVERVIEW: MAKING THE MOST OF OPPORTUNITY ZONES

Ted Brady & Nick Grimley
Agency of Commerce and
Community Development

GENERATING SOCIAL RETURN

Kesha Ram
VT Community Foundation

ANTICIPATED TAX BENEFITS

Stephen Trenholm
Gallagher, Flynn & Company

INCORPORATING OPPORTUNITY FUNDS INTO PROJECTS

Shannon K. Lenzini
Downs Rachlin Martin

INVESTMENT AND DEVELOPMENT OPPORTUNITY

Thom Lauzon
Metro Development

NEXT STEPS?

James B. Stewart
CVEDC

Speakers

Title: Making the Most of Opportunity Zones

Description: Ted Brady & Nick Grimley have worked to submitted 25 Zones for federal consideration, with final approval forthcoming, for the State of Vermont

Title: Generating Social Return

Description: Kesha Ram has received a grant from the Harvard Kennedy School Social Change Initiative to work on a research project with the Vermont Community Foundation to explore the potential advantages and risks of Opportunity Zones for Vermont communities and businesses. Kesha has been making observations in each Opportunity Zone and documenting findings to identify local advantages unique to each designated Opportunity Zone, potential capital assets and expectations of investors, and goals and principles that will help drive a shared vision of success.

Title: Anticipated Tax Benefits

Description: Stephen Thenholm provides general accounting and tax services to a diversified client base, including individuals, corporations, partnerships and limited liability companies. Steve works with clients in a number of industries including manufacturing, real estate, construction and professional services. Additionally, Steve provides tax consulting in areas of complex tax issues including mergers, business formations, and tax credit studies.

Title: Incorporating Opportunity Funds into Projects

Description: Shannon K. Lenzini Downs Rachlin Martin will touch briefly on combining Opportunity Zones with NMTC and HTC and possibly also LIHTC.

Title: Investment and Development Opportunity

Description: Thom Lauzon is a CPA at Salvador and Babic, P.C.

Title: Next Steps

Description: James B. Stewart is the Executive Director of the Central Vermont Economic Development Corporation.