



## **DAY 1 – April 13, 2016**

1. Opening Remarks (8:30-8:45).
2. **State of Play with EB-5 legislation and Congress and Advocacy 101 (8:45-9:30)**

### Discussion Topics

- The 2016 Legislative Landscape and Potential Outcomes
- Is Consensus Reform Possible in 2016?
- The Need for a Permanent EB-5 Regional Center Program
- Economic and Human Consequences of Program Sunset

**\*Participants: Laura Reiff (Facilitator), Jon Baselice (Facilitator), Peter Joseph, Jeff Campion, Ron Klein, Bob Maples**

3. Travel to Senate Hearing (9:30-11:45)
4. Lunch (12:00-12:30)
5. **Investment Amounts and Fair and Reasonable Targeted Employment Area (TEA) Policy (12:30-1:15)**

### Discussion Topics

- Alternative Approaches to TEA Policy
- Can TEA Policy Reform be the Key to Reasonable Broader Reform?
- Industry Views on Economically Realistic Investment Differentials
- Market Tolerance of Increased Minimum Investment Levels

**\*Participants: Matt Virkstis (Facilitator), Angel Brunner (Facilitator), Bill Gresser, Alex Verba, Erika Banach, Charles O’Byrne, Nick Mastroianni**

6. **Reforms to Promote Investor Confidence and Increase Efficiency; Oversight and Integrity Measures (1:20-2:20)**

### Discussion Topics

- Industry Views on Current Proposals to Promote Program Integrity and Strengthen Oversight Measures
- The Importance of Investor Protections: Age-Out Protection, Investor Safe Harbor, Concurrent Filing of Petitions



**\*Participants: Kate Kalmykov (Facilitator), Osvaldo Torres (Facilitator), Greg Wing (Facilitator), Michael Homeier, Jill Jones, Ron Fieldstone, Yura Barabash**

**7. Reasonable Effective Dates (2:20-3:20)**

Discussion Topics

- Practical Impacts of Retroactive Application of New Program Rules
- What is a Fair and Reasonable Legislative Approach to Effective Dates and Grandfathering Rules for Investor and Project Petitions?
- Effective Advocacy against Unreasonable or Unfair Grandfathering Rules or Retroactive Application

**\*Participants: Nick Mastroianni (Facilitator), Adam Greene (Facilitator), Dan Healy (Facilitator), Ron Klasko, Richard Biegel**

**8. Coffee Break (3:20-3:30)**

**9. Preserve, Protect and Improve Current Job Creation Methodologies; Preapproval of Business Plans/Projects and Premium Processing (3:30-4:20)**

Discussion Topics

- The Central Role of Indirect Job Creation in the EB-5 Regional Center Law
- Discussion: Potential Impact of Current Proposals for Reform of Job Creation Methodologies
- Potential Benefits of Binding Project Preapproval and Premium Processing

**\*Participants: Angel Brunner (Facilitator), Enrique Gonzalez (Facilitator), Kim Atteberry, Jeff Carr, Marge Lessard, Jor Law**

**10. Enhance Regional Center Investment Capacity—Derivatives, Quotas, Recapture and Backlog Reduction - (4:30-5:20)**

Discussion Topics

- Impact of Backlogs on the Investor Market and the Need for Enhanced Program Capacity
- Is Backlog Reduction Politically Viable in 2016?
- Could Compromise on Other Policy Issues Sow the Seeds of Success?

**\*Participants: Laura Reiff (Facilitator), Ron Klasko (Facilitator), Carolyn Lee, Justin Gardinier, Ron Klein**

**11. Concluding Remarks – Thanking our champions.**



12. Special Event – Reception (6:00-7:00) at Workshop Hotel

**DAY 2 – April 14, 2016**

1. Special Event – Breakfast (8:00-9:00)  
Capitol Hill Club, 300 First Street, SE, Washington, DC
2. Meeting with Senator Flake and Staff (9:30am)
3. Hill Visits – EB-5IC will arrange for those interested meetings with staff members of the House and Senate to discuss EB-5.
4. EB-5 Briefing (3:00) – There will be a briefing on EB-5 to staff members.