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Development Association

Supporting Responsible Development



**MEREDA's 2025
Annual Real Estate
Forecast Conference &
Member Showcase**

February 27, 2025



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FORECAST CONFERENCE

Where Important Conversations Happen

2025 Annual Real Estate Forecast Conference

Thursday, February 27, 2025

9:00 - 10:00 AM - Registration, Member Showcase & Continuing Education Credit Sign-In

10:00 Conference Introductory Remarks: *Shannon Richards*, President, MEREDA Board

10:15 Partnering For Maine's Next Frontier: *Chris Mallett, EdD*, Chief Administrative Officer, Northeastern University's Roux Institute

MEREDA HIGHLIGHTS:

10:40 Overview of MEREDA's Legislative Agenda: *Elizabeth Frazier*, Partner, Pierce Atwood, LLP

ECONOMIC OVERVIEW:

11:10 Economic Overview: *James Marple*, Managing Director, Senior Economist, TD Bank Group

11:40 Recognition Awards Ceremony

12:00 Lunch & Member Showcase Open

Choose One Session in Each Time Slot: (Three total sessions)

	ROOM A — Connecticut / Rhode Island	ROOM B — Vermont	ROOM C — Massachusetts / NH
1:00	<p>Hospitality Outlook <u>Alex Wolf</u>, Prentice Hospitality Group <u>Nate DeLois</u>, Uncommon Hospitality <u>Allison Lynch</u>, Baskervill (Moderator) <u>Marieke Thormann</u>, Fathom Companies</p>	<p>Office Outlook <u>Nate Stevens</u>, The Boulos Company <u>Jeana Stewart</u>, SMRT (Moderator) <u>John Finegan</u>, The Boulos Company</p>	<p>Regional Outlook <u>Molly Briggs</u>, Epstein Commercial Real Estate <u>Brandon Mitchell</u>, Malone Commercial Brokers <u>Kevin Fletcher</u>, KW Realty (Moderator) <u>Roxane Cole</u>, Roxane Cole Commercial Real Estate</p>
2:00	<p>Municipal Trends <u>Mark Adams</u>, Sebago Technics <u>Dan Stevenson</u>, City of Westbrook <u>Marty Grohman</u>, City of Biddeford (Moderator) <u>Gary Vogel</u>, Drummond Woodsum</p>	<p>Industrial Outlook <u>Justin Lamontagne</u>, The Dunham Group <u>Josh Benthien</u>, Northland Enterprises <u>Adam Martin</u>, Harvey Performance Companies (Moderator) <u>Josh Soley</u>, CORE</p>	<p>Construction Outlook <u>Nicole Rogers</u>, SMRT <u>Tim Schneider</u>, SageStone Consulting <u>Mason Rowell</u>, Landry/French Construction (Moderator) <u>Ben Brennan</u>, KONE</p>
3:00	<p>Retail Outlook <u>Taryn Trefethen</u>, Brookfield Properties <u>Nick Margitza</u>, WS Development (Moderator) <u>Jenn Small</u>, Malone Commercial Brokers</p>	<p>Financing Trends <u>Steve deCastro</u>, Maine Community Bank <u>Andrew Silsby</u>, Kennebec Savings Bank <u>David Hulit</u>, Port 51 Lending (Moderator) <u>Kim Twitchell</u>, NBT Bank</p>	<p>Residential & Multifamily Outlook <u>Brit Vitalius</u>, Vitalius Real Estate Group <u>John Laliberte</u>, Reveler Development <u>Elise Kiely</u>, Legacy Properties Sotheby's International Realty (Moderator) <u>Paul Peck</u>, Drummond & Drummond, LWS Development</p>

4:00 Conclusion of Event | Showcase Re-Opens | Social Hour & Raffles | Continuing Education Credit Sign-Out

CONTINUING EDUCATION CREDITS

This course has been approved for **4 hours** by the **Maine Real Estate Commission** for In-Person Continuing Education Credits for Real Estate Licensees and Appraisers.

This course has been approved by the **Maine Board of Overseers** for **4 hours of legal continuing education credits**. Those seeking credits for attorneys must also sign in.

This course has been approved by **AIA Maine** for **4 hours** of architect credits. Those seeking credits for architects must also sign in.

This course has been approved by **Maine Revenue Services** for **4 hours** of assessor credits. Those seeking credits for architects must also sign in.

**** ATTENTION **** In-Person real estate licensees and appraisers seeking credits will be **required to sign-in** upon arrival (before 10:00 am), **and also sign-out** at the end of the program (not before 4:00 pm).

You **MUST sign the pink sign-in / sign-out sheets** located next to the registration area. **Failure to sign both in and out sheets will result in the forfeiture of credits.**

We must have proof of 2 signatures. **No exceptions.**

Certificates of Completion will be Mailed to You.

CONTINUING EDUCATION CREDITS

SPEAKER BIOGRAPHIES

2025 Real Estate Forecast Conference Speakers

Shannon Richards was born and bred in Maine. An artist and entrepreneur since she was young, she's spent the last 20-plus years in the practice of designing and building, manifesting a life centered around creation, Shannon has produced hundreds of custom homes, commercial spaces, pieces of furniture and fixtures. She is the founder of Hay Runner as a way to simplify the lifecycle of home ownership through buying, fixing up, designing, building, maintaining, and selling – helping people every step of the way. She is a part of the Greater Portland Board of Realtors, the Maine Association of Realtors, and the National Association of Realtors. She is currently serving a two-year term as president of the Maine Real Estate & Development Association (MEREDA) from 2024 – 2026.

Chris Mallett, EdD, is Chief Administrative Officer at The Roux Institute. Chris has led and been part of teams that have built two of this century's most creative and impactful higher education institutions: Northeastern University's Roux Institute and Western Governors University.

At the Roux Institute, Chris leads teams that are building a new model for talent and economic development by working with industry community partners throughout Maine. The institute's graduate and custom education programs help people and businesses develop the competencies they need to lead and grow. Tech-focused research teams spur new discoveries and help partners to innovate. And the Roux's programs for entrepreneurs help founders grow and sustain their startups, making Maine the most exciting place to start and grow a business.

At WGU, Chris was a member of the founding team that pioneered online competency-based education at the dawn of the commercial Internet, enabling access to postsecondary education and career growth for 500K+ learners and alumni/ae since 2000. The team developed and scaled new learning paradigms that have evolved to become the gold standard in online, personalized learning. Chris' WGU experience spanned 14 years and included leadership of enrollment, faculty, and product divisions.

Himself a lifelong learner and the first member of his family to experience postsecondary education, Chris has earned associate's and bachelor's degrees in general education and political science, respectively, from Weber State University. While working at WGU, Chris earned a master's in public administration at the University of Utah and a doctorate in education at Pepperdine University.

Chris and his wife Charlet reside in Freeport, Maine. They are the parents of three children. Two are graduates of Northeastern University; the other is enjoying 9th grade.

Elizabeth Frazier is a partner at Pierce Atwood, focusing on government relations, lobbying, business advocacy, and environmental and land use policy. Elizabeth divides her time between Pierce Atwood's Portland and Augusta, Maine offices. Elizabeth grew up in and around her family's Maine-based small business, which has given her unique insights into the challenges and opportunities of running a business in Maine.

Prior to moving back to Maine, Elizabeth served as a staffer for Congresswoman Chellie Pingree in her Washington,

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DC office. Her experience both in Washington and back home in Maine has given Elizabeth an understanding as to what resonates with Maine policy makers and how to shape a legislative strategy in the best interest of her clients. Specifically, Elizabeth's professional and political experience have given her a nuanced understanding of Maine politics, and her pragmatic approach to policymaking allow Elizabeth to elevate her clients' interests above the political fray.

Elizabeth has direct experience working with business, professional associations, and advocacy organizations to navigate complex legal, regulatory, and political issues. In this time of increased state-level policymaking, Elizabeth is intimately familiar with the interplay between multi-state business interests and local policymaking. Additionally, Elizabeth has been involved in the work of climate action and preparedness – an area rife with both risk and opportunity for Maine business.

James Marple is an Associate Vice President and Senior Economist with TD Bank Group. James and the economics team provide analysis and forecasts to TD clients and stakeholders covering the U.S., Canadian, and global economies.

In his current role, James oversees the economic scenario generation process for internal and regulatory stress testing exercises for the bank's operations in Canada and the U.S.

James received his graduate degree in Economics from the University of Toronto in 2005. In October of 2024 he celebrated his seventeen-year anniversary with TD Bank Group.

Nate Stevens joined The Boulos Company in 2007 after working with CBRE in Tucson, Arizona prior to moving back to Maine. Nate works in all areas of commercial real estate including office, retail, industrial, development, and investment properties located in Central and Southern Maine. Nate has extensive experience working with local and national developers, investors, and companies including nonprofits, start-up businesses, state organizations, local municipalities, and large corporate companies. Nate is often asked to contribute to articles and be a panelist based on his knowledge of the commercial real estate market. He is also a regular speaker at the annual MEREDA conference where he presents on the status and future of the southern Maine office market.

A Portland, Maine native, Nate left to study at the University of Arizona where he received his bachelor's degree in Regional Development. He was an accomplished swimmer captaining the Division 1 men's team to consecutive top four finishes at the NCAA Division 1 championships as well as earning All-American status and reaching a top 25 world ranking. This leadership and competitive spirit is what drives Nate's achievements in commercial real estate. Nate has a long, well-engrained family history in Portland; his great-great grandfather was famed regional architect John Calvin Stevens, a legacy which spawned his interest and passion for the local built environment.

Nate graduated from the University of Arizona with a Bachelor of Science Degree in Regional Development. Nate lives in the Deering Center neighborhood of Portland with his wife, Jane, and son, Carter. They enjoy summers on Little Diamond Island in Casco Bay.

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Professional Affiliations/Accreditations include 2018 Maine Commercial Association of Realtors – Realtor of the Year, Maine Real Estate Broker License, Member of the Greater Portland Chamber of Commerce, President of Maine Commercial Association of Realtors, President of Greater Portland Landmarks, Trustee of Portland Public Library.

Jeana Stewart is the director of SMRT’s workplace practice and is a nationally certified interior designer. She is a strong communicator who brings energy and vision to the development of highly customized, people focused solutions. Working collaboratively with stakeholders, she ensures that the workspace—and the process used to create it—speak directly to an organization’s unique culture, values, and ROI goals. Since joining SMRT in 2007, Jeana has become highly regarded for embracing change and motivating others to do the same. She stays on top of the latest global research informing the future of work and balances data and empathy to help organizations overcome the uncertainty of what comes next. Jeana is adept at creating workplace strategies and purpose-driven designs that meet each client’s unique needs.

John Finegan joined The Boulos Company in 2020 and is an Associate Broker. He works throughout Greater Portland in all areas of commercial real estate including the buying, selling, and leasing of office, retail, industrial, and multifamily family properties. John also works on ground-up development, with a particular focus on multifamily development and economic policymaking as it relates to development.

John is the co-chair of MEREDA’s Local Issues Committee. He was born in North Yarmouth and attended high school at North Yarmouth Academy. He is a graduate from the University of New Hampshire with a dual major in Finance and Accounting. In a previous career, John was a Regional Sales Manager for a defense contractor covering Australia, New Zealand, and Northern Europe. He currently lives in South Portland with his wife Elizabeth.

Alex Wolf is Vice President of Prentice Hospitality Group. With over two decades of experience and a lifelong passion for hospitality, Alex brings keen leadership to his role. The majority of Alex’s career unfolded in the esteemed kitchens of New York City. In his work as General Manager for Jean-Georges Vongerichten’s eponymous flagship, he helped the restaurant earn 4 Stars from the New York Times and 3 Michelin Stars. He then ascended to Director of Restaurants, overseeing operations for all NYC properties and global openings. In this capacity, Alex honed exceptional training, recruitment, and team development skills. Eager to expand his expertise, Alex transitioned into hotels as the Vice President of Food and Beverage for Aparium—the respected Chicago-based lifestyle brand renowned for community building. Most recently, Alex served as Group Director of Food and Beverage for London’s Lore Group, an international luxury design hotel chain. He provided stellar leadership in conceptualizing brands and evolving cuisine, while executing operations for acclaimed properties in Amsterdam, Washington DC, and London. With decades of outstanding hospitality experience on both sides of the Atlantic, Alex brings expert passion, leadership, and dedication to his role leading Prentice Hospitality Group into the future.

Nate DeLois is the Chief Financial Officer and Director of Development at Uncommon Hospitality, a hotel development and operations company he founded with his brother, Tony DeLois, in 2018. Uncommon operates four hotels in Southern Maine with two more in development. The current portfolio includes The Colonial Inn

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and The Admiral's Inn, both in Ogunquit, and The Francis Hotel and Longfellow Hotel, both in Portland. The two projects in development are in Augusta and Rangeley.

Nate has worked in commercial real estate brokerage and development for over 20 years. A 2000 graduate of Hamilton College, he has two children with his wife, Melissa—a daughter, Lucy, and a son, Jackson. They live in Yarmouth, Maine.

Allison Lynch is a Principal and Chief Administrative Officer at Baskervill, a multi-national, multidisciplinary design practice currently ranked a Top 10 Hospitality Architecture Firm by Building Design + Construction. A veteran of the A/E/C industry, Allison leverages her passion for the built environment, people, and the power of communication in her role leading Baskervill's business operations. Overseeing legal and risk, strategy, licensure and compliance, and administration, she works closely with firm leadership to navigate the impacts of process and culture on the firm's future. Allison is a graduate of Boston College's Carroll School of Management and is the Immediate Past President of SMPS Northern New England. She resides in Yarmouth with her family.

Marieke Thormann is the Vice President of Development at Fathom Companies, a hospitality and real estate management company that concentrates on developing and providing consulting services for ground-up construction, historic renovations, and repositioning of hotel, office, residential, and mixed-use properties. She is a licensed Professional Engineer that facilitates and oversees all parties involved in new development and renovation projects, from site acquisitions, pre-construction management, design development, and construction coordination through project completion. Marieke brings over a decade of experience with multi-million-dollar construction and development projects ranging from boutique hotels and mixed-use urban high-rises to institutional offices and schools. As an engineer, Marieke is known for her strong problem-solving skills that empower her to work with design teams, Owners, and contractors to collaboratively resolve complex challenges. She is well established in the construction and development industry in the Mid-Atlantic and Northeast and has built a reputation of strong leadership, trusted management, and a deep understanding of design and construction.

Her recent notable work on Fathom Companies' developments include the Canopy Portland Waterfront hotel (opened June 2021), and current master development plans for The Pearl Street Riverfront District in Biddeford, and a hotel development at 385 Congress Street in Portland, part of the larger Herald Square Development. Thormann also leads project management and consulting services at Fathom Companies for other real estate developers, including the planned renovation of the historic Time & Temperature Building in Portland.

Since 1998, **Molly Briggs** has been a member of the Epstein Commercial team and serves as the Executive V.P. of Lease Administration. With over twenty years of commercial real estate experience, she is active in commercial leasing for all market sectors, specializing in the leasing of office and retail space. In addition to commercial leasing, property management and lease renewals of a portfolio of owned properties, Molly also works on signage, special projects, and marketing.

Molly lives in Hampden with her husband and daughter. She enjoys spending time with family, traveling,

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cooking and entertaining. Education: Husson College, B.S. Business Administration

Community Involvement includes Bangor Region YMCA Event Committee – 2024 to Present, Cross Insurance Center Advisory Board – 2020 to Present, Cross Insurance Center Gala Committee Chair – Past, Downtown Bangor Partnership Chair - Past

Brandon Mitchell joined Malone Commercial Brokers in 2017 after several years with SVN/ The Urbanek Group. Prior to his tenure there, he was a commercial construction project manager with Ledgewood Construction, Landry-French Construction and PC Construction. As a commercial real estate broker, Brandon has participated in over \$100 million of commercial sales and leases. He works across all sectors of the market but specializes in large industrial properties, multifamily portfolios and self-storage facilities throughout the state. He is an active member with NESSA - Northeast Self Storage Association. After working two summers on a lobster boat on Casco Bay during college breaks, Brandon graduated from Michigan State University with a degree in construction management and moved to Maine full-time in 2002. Brandon is involved in various community organizations and resides in Cape Elizabeth with his wife and three children.

Kevin Fletcher is the Team Leader of Keller Williams Realty in Maine and brings nearly 30 years of experience to his role with the largest real estate company in Maine. He has an extensive knowledge of the Maine Real Estate Market with a focus on the Commercial and Investment Real Estate. Kevin has completed complex commercial transactions from Bangor, ME to Seabrook, NH and has sold over 450 separate apartment buildings in his career and conducted investment transactions ranging from small neighborhood strip malls to investment deals with national tenants. Kevin has also assisted in, and consulted on, a wide range of commercial and residential developments throughout Maine.

Kevin brings a down-to-earth approach to his business and a hard driving work ethic to help satisfy his client's needs with a strong belief in fiduciary responsibility to his client's checkbook and not his own.

*Licensed Real Estate Agent since 1997, CCIM (Certified Commercial Investment Member) since 2002, US Army Combat Veteran having served from 1992-1996, President-Maine Commercial Association of Realtors from 2016-2018, Commercial Committee Member-National Association of Realtors 2017-2019, 2007 Realtor of the Year, Maine Commercial Association of Realtors, Board of Directors-Auburn Business Development Corporation, KW Commercial "Newcomer of the Year" 2019

Roxane Cole founded the firm Roxane Cole Commercial Real Estate LLC in February 2010. Previously, she was co-owner of a leading Portland commercial brokerage firm where she was a broker for 23 years. Prior to brokerage, she entered the business as a commercial property manager—responsible for office and retail properties and condominium projects. At age twenty-five she founded and co-owned a chain of retail stores and a mail-order business that she sold prior to entering the field of commercial real estate.

After graduating from the University of Maine at Orono, she taught school and dabbled in several entrepreneurial ventures.

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Roxane is a Certified Commercial Investment Member, CCIM, having completed the curriculum and professional-experience requirements for the prestigious international designation held by only six percent of commercial real estate professionals nationally.

She is the recipient of the 1999 Commercial Broker of the Year Award from the Maine Commercial Association of Realtors and is a 2002 recipient of YWCA's Women of Achievement Award. She received the 2009 Public Policy award from the Maine Real Estate and Development Association. Roxane is Past President of the Maine Real Estate & Development Association, is past Chair of the Greater Portland Chamber of Commerce and served as president of the Portland Rotary Club. Roxane is a founding board member of the Maine Commercial Association of Realtors and a founding board member of the University of Southern Maine Foundation.

Roxane is a life-long, avid sports fan. She enjoys watching NFL Football, MLB baseball and golf. She is a former basketball player and currently enjoys playing golf. Roxane is inspired by meeting goals and by continual self-improvement in all areas of her work and personal life.

Justin Lamontagne is recognized as one of the leading experts on industrial real estate in Maine. With eighteen years of experience, he has successfully brokered transactions in all sectors, specializing in industrial, office, and investment properties. From strategic planning and representation for both buyers and sellers, to site searches and commercial property valuations, his exceptional market knowledge and expertise is an asset for clients looking for not only results, but a lasting relationship. Carrying his Rotarian principles forward in every deal, Justin is always looking out for his clients' best interest and often talks people out of deals rather than into them. As such, he has fostered a reputation for being a genuine and trustworthy partner for clients.

As someone who approaches the market with a broad lens to understand all the different angles, positions, and perspectives, Justin is someone both clients and colleagues look to for his market insight. In 2013, Justin was named the Maine Commercial Association Realtor of the Year. In 2015 he earned the prestigious CCIM accreditation, an international membership comprised of the world's top commercial real estate professionals. In 2017 he earned the Society of Industrial & Office Realtors (SIOR) designation, a global network of only 3,600 industry leaders. In doing so, he became the 5th broker in the state of Maine to carry both CCIM & SIOR honors. Annually, Justin is the author of The Dunham Group's Greater Portland Industrial Market Survey, a comprehensive study and inventory of the local industrial market.

Justin is active in several Greater Portland philanthropic and professional organizations. He currently serves on the Board of Directors of the Maine Commercial Association of Realtors (Past President), Maine Cancer Foundation, Town & Country Federal Credit Union, and Portland Little League. Justin is also an active member of the Rotary Club of Portland, the Maine Real Estate Development Association, the Portland Chamber of Commerce, and the CCIM & SIOR New England chapters.

Justin joined The Dunham Group in 2011. In 2016 he earned Partnership in the firm and, in 2019, was named Designated Broker. He has worked in commercial real estate since 2006 and has a degree from the University of Rochester (BA '02) and an advanced degree from Boston University (MS '04). In his free time, Justin is an avid water skier, snow skier, hiker, rock climber and plays organized softball. He lives in Portland with his wife,

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Marycelina, their children Katherine and William and their dog, Payson. His wife is a 5-year breast cancer survivor, an experience that has contributed to Justin's empathy for others, commitment to having a true work/life balance, and his focus on giving back

Josh Benthien is the CEO and Managing Partner of Northland Enterprises, a Portland based commercial developer and property management firm. Northland specializes in developing long-term tenant relationships with growing regional companies through build-to-suit and sale-lease-back projects.

Under Josh's leadership, the company has developed a half million square foot portfolio with an aggregate value of over one hundred million dollars. The Northland properties include manufacturing, warehouse, office, specialty retail, and medical office facilities located throughout Maine.

Recent build to suit projects: Harvey Performance Company: Manufacturing in Gorham, Pack Edge Inc.: Warehouse and Manufacturing in Saco, Clark Insurance: Class-A Office in Portland, and Diversified Partners: Medical Office in Portland.

Adam Martin joined Helical Solutions in 2012 prior to Harvey Tool's 2015 acquisition of the Gorham Maine based company. Now Harvey Performance Company, headquartered in Rowley Massachusetts, is a leading provider of specialized cutting tools for precision machining applications with locations in Maine, Massachusetts, Idaho, and California. Harvey Performance serves the market through industry-leading brands Harvey Tool, Helical Solutions, Micro 100, Titan USA, CoreHog, and Valor Holemaking. In 2024, Harvey Performance Company further acquired ATA, an Ireland-based precision engineering multinational and the parent company of the Karnasch, SGSPRO, ATA Tools, Van Hoorn Carbide, Industrial Tooling Corporation, and Garryson brands. Today the Harvey Performance Company comprises 12 brands, spanning 12 countries, and nearly 1,000 employees. Adam is the General Manager of the 79,000 square foot, state-of-the-art manufacturing facility, located in Gorham, Maine.

Josh Soley began his career in commercial real estate in 2011 as an asset manager for Lincoln Center Property Management (LCPM). At LCPM he oversaw more than 1 million square feet of retail, office, and industrial space throughout Southern and Central Maine. Josh made the transition to brokerage in 2014, and subsequently, launched CORE in 2017 as the State's premiere full-service commercial real estate firm. CORE has consistently been a leader in both commercial brokerage and asset management since its inception.

Josh specializes in investment sales and has facilitated high-profile transactions in Maine, New Hampshire, Vermont, New York, Maryland, South Carolina, Georgia, and Florida. Josh has completed both sales and leases in excess of \$500M, consistently making him one of Maine's most prolific agents. In 2021, CoStar honored Josh as a Power Broker for topping the industry in sales. In 2022, MaineBiz named Josh on their 40 Under 40 list of dynamic individuals changing Maine's economy.

Outside of the office, you can find Josh passionately coaching Boys' Varsity Basketball at Waynflete School.

Mason Rowell serves as Vice President of Preconstruction at Landry / French Construction and is responsible

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for directing and managing preconstruction activities for all Landry/French Construction projects. Mason manages the in-house, six-person planning, preconstruction, and estimating team.

With a diverse background spanning two decades in various project management roles, Mason has a unique understanding of all aspects of construction. Notably, he has played an integral role in the preconstruction phase of numerous projects at Colby, including the Bill & Joan Alford Main Street Commons, the Paul J. Schupf Art Center, the Arts Collaborative, the Lockwood Hotel, all part of the Waterville downtown revitalization, and most recently the Mayflower Hill Residence Hall, which will be Maine's largest CLT building in Maine.

Mason holds a Master of Science in Construction Management from Wentworth Institute of Technology and a Bachelor of Science in Natural Sciences from Xavier University. Additionally, he is a Board member of the Associated Builders and Contractors (AGC) of Maine.

Mason also served as a Captain in the United States Army Corps of Engineers.

Nicole Rogers is a senior principal and the director of architecture at SMRT Architects & Engineers. She brings over 18 years of experience in leadership, design, and problem-solving and is highly regarded for her ability to integrate client missions into project outcomes. Nicole obtained a Bachelor of Architecture from Lawrence Technological University and a Master of Architecture from the University of Cincinnati. Nicole partners with clients to ensure their building's design serves its users' needs, regardless of size, scale, or cost. Currently, Nicole serves as project manager on the University of Maine's Green Engineering and Materials Factory of the Future project where she is working closely with the University to bring Industry 4.0 onto campus. She also recently served as project architect for the L.L.Bean and Hannaford office headquarters. Her multi-layered approach to design evokes personal connections to spaces, resulting in positive experiences and memories for users like students, teachers, and corporate professionals.

Tim Schneider is the founder and sole proprietor of SageStone Consulting, a real estate development and commercial construction consulting firm specializing in Owner's Representative and Owner's Project Management Consulting services.

Tim's passion for building began while framing custom homes during his studies. Over the next 18 years, he honed his expertise in the construction and development industries, holding key roles including Project Manager at a construction management firm, Director of Development at a hotel developer and operator, and Director of Construction and Operations at a mixed-use real estate development firm.

Throughout his career, Tim has managed numerous high-profile projects, including the Colby College Museum of Art, the Bates College Chu and Kalperis dormitories, the Hyatt Place-Old Port, and the SunLife headquarters. His broad experience allows him to deliver substantial value to his clients, leveraging his deep knowledge of building, project management, and development to assemble strong teams, drive alignment with client goals, mitigate risks, and consistently deliver exceptional results. Tim's approach emphasizes efficiency, clarity, quality, and value, ensuring that every project is completed successfully.

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Tim holds a Bachelor of Science in Construction Management from Fitchburg University. He is certified by the Office of the Inspector General as an Owner's Representative for Massachusetts school projects, is OSHA 30 certified and is a certified professional inspector. Tim is a member of the Maine Real Estate & Development Association (MEREDA) and involved with its DevelopME committee.

Ben Brennan is a Senior Sales Executive for KONE Elevators, located in South Portland, ME. Responsible for new equipment business development & project management, Ben partners with stakeholders of new and existing real estate developments in Maine, New Hampshire, Vermont & Massachusetts. From schematic design & early budgeting through construction to project handover, Ben supports clients through all phases of a project's lifecycle.

Ben grew up in Freeport and is a graduate from the University of Maine. Ben was hired in 2013 by KONE to deliver energy efficient elevator solutions to a Northern New England market that KONE had mostly not been a part of outside of Massachusetts. Over the last 12 years, Ben has grown KONE's market share to a market leader position in these markets. As a green energy advocate, Ben's interests lie in finding a medium between green technology & affordability. Ben is a member of the Maine Real Estate & Development Association (MEREDA) where he is active on the Board of Directors and co-chair of its Local Issues Committee. Ben received MEREDA's Volunteer of the Year Award in 2022 for his many contributions to the organization.

Ben lives in Portland with his wife, their two boys and their yellow lab, Tug.

Mark Adams is the President/CEO and Board Chair of Sebago Technics, Inc. (Sebago), a leading land development consulting firm headquartered in South Portland, Maine, with regional offices in Bridgton and Sanford. He joined Sebago in 2005 as Executive Vice President and became President/CEO in 2011. A graduate of the University of Maine with a BA in Public Management, Mark brought more than two decades of leadership experience in the public sector, having served for 20 years in city management roles for Lewiston and Auburn. His career spans key areas of public administration, infrastructure development, economic growth, planning, and community engagement.

Throughout his tenure at Sebago, Mark has expanded the firm's public sector portfolio, helping municipalities across Maine address their engineering, planning, surveying, and public outreach needs. His deep-rooted relationships with local governments and officials statewide are a testament to his commitment to public service and leadership. Mark has been instrumental in advancing community development efforts, from site-specific projects to broader regional economic initiatives.

A passionate advocate for employee ownership, Mark has championed the implementation of an Employee Stock Ownership Plan (ESOP) at Sebago, believing strongly in the positive impact of shared ownership on organizational success, employee engagement, and company culture.

Mark's leadership has been pivotal in Sebago's growth, acquisitions, and its sustained reputation for delivering innovative, high-quality land development solutions. His extensive experience in both the public and private sectors has enabled him to lead the company's business development efforts and foster meaningful community

SPEAKER BIOGRAPHIES

SPEAKER BIOGRAPHIES

involvement. Mark's dedication to community service is reflected through his active roles with organizations such as Central Maine Community College, Central Maine Health Care, the Lewiston-Auburn Clean Water Authority, the United Way, the Chamber of Commerce, the LA Economic Growth Council, MEREDA, the American Council of Engineering Companies (ME), and The ESOP Association, among others.

Daniel Stevenson has been the City of Westbrook's Director of Economic Development since 2017. Daniel has worked in the field of economic and community development for 25-years, both at the state and municipal levels and has extensive knowledge and expertise in public finance, public-private partnerships, and legislative and policy work. As a Maine economic development practitioner, Daniel is intimately familiar with economic and community issues affecting municipalities throughout the State of Maine. He has a long track record of new development and redevelopment accomplishments, coupled with a deep knowledge and understanding of state and federal programs that spur business investment. As Westbrook's Director of Economic Development, Stevenson has cultivated strong working relationships with partnering organizations that share his desire to promote sustainable business development for the region. Under his leadership, the city is investing millions of dollars in strategic economic development projects.

Marty Grohman is the youngest of 8 kids and grew up on a farm in Carthage, Maine, milking the cows before catching the school bus every day. Marty went to Dirigo schools and then to Gould Academy in Bethel, and to Rensselaer for engineering school. After graduating he got a job at GE Plastics, and worked all over the US and in Austria, helping start up plants making composite decking, and still holds some patents for the process. In 1999, he co-founded the company that is now Duralife Decking, based in Biddeford.

Marty served the city of Biddeford as a State Representative for two terms between 2014 and 2018. He was elected to represent Ward 3 on the City Council in 2021 and as Mayor in 2023. Outside of his service as Mayor, Marty recently worked at Eaton Peabody as a non-attorney Business Consultant, working with startups in the energy, environmental, and bluetech space as a coach and mentor.

Gary Vogel is a shareholder at the law firm of Drummond Woodsum. Gary's practice is concentrated in real estate, real estate development, including affordable housing development and historic rehabilitation redevelopment projects, real estate finance, condominium development and mergers and acquisitions. He is a leading practitioner in Maine on projects utilizing the Federal and State Low-Income Housing Tax Credit, Federal and State Historic Tax Credits and New Market Tax Credits and is recognized as the most experienced attorney representing housing authorities in the State of Maine. He has been counsel for developers or lenders in some of the most significant real estate development projects in Maine over the past many years. He has been practicing law in Portland for 40 years and resides in Yarmouth.

Brit Vitalius has made a career selling multi-family properties in Greater Portland since he started in real estate in 2004. He founded Vitalius Real Estate Group in 2011 as a boutique agency of select professionals who could provide a full complement of high quality brokerage services to clients.

Brit has served for more than a decade as President of the Rental Housing Alliance of Southern Maine (formerly

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SPEAKER BIOGRAPHIES

the Southern Maine Landlord Association), a local non-profit group of rental housing providers from across the industry. He is a co-founder of the Quality Housing Coalition, which focuses on opening-up market rate apartments to at-risk tenants, including asylum seekers and other new Mainers, single mothers in recovery, youth, and many others.

He currently serves as Past-President of the Portland Community Chamber of Commerce, which gave him the opportunity to host "Eggs and Issues," Portland's premier business and networking event.

Brit co-chairs the Greater Portland Board of Realtors LPAC Committee and sits on Maine Listing's Rental Database Task Force. He presents an annual report at the Maine Real Estate and Development Association's Annual Forecast Conference for the multi-unit sector. He personally owns and manages multi-unit investments in Portland and Yarmouth.

Brit grew up in Yarmouth, Maine before he graduated from Harvard University in 1995. He worked in technology as a programmer and team manager at BBN, the company that developed the forerunner of the internet. Brit currently lives in Yarmouth with his wife, Yasmin, 14-year-old son, Coltrane and 12-year-old daughter, Allegra. In his limited spare time, Brit enjoys mountain biking, skiing, tennis, and single malt scotch.

Current Boards & Committees—President of Portland Community Chamber of Commerce, President of the Rental Housing Alliance, Co-founder and President, The Quality Housing Coalition, Trustee of the Maine College of Art & Design, Co-Chair, Greater Portland Board of Realtor's Legislative and Political Action Committee.

Elise Kiely of Legacy Properties Sotheby's International Realty consistently ranks among the top brokers in Maine and is currently in the top 0.5% in the state. She makes it a point to have her buyers, sellers, and investors know that she provides a level of service unmatched in a crowded and competitive industry.

Elise grew up in Baltimore, Maryland, and attended UNC Chapel Hill (Go Tarheels!) where she studied Political Science and International Studies. Elise almost entered the Foreign Service after a couple of internships with the State Department in DC, but ultimately decided to go to law school, as she wanted a career where she could craft creative arguments and strategically position clients to maximize value and minimize risk in their businesses. She graduated from Emory University School of Law, and for nearly a decade litigated high technology and anti-trust issues in Washington DC.

Having moved to Maine in 1996, Elise decided to leave her legal career in 2001 and start investing in residential real estate, and ultimately got her real estate license in 2005 to facilitate those investments. Representing high-end developments and clients in the greater Portland area, Elise's experience as a real estate developer and investor, broker, and former litigator has given her a powerful skill set and makes her as conversant in zoning codes as she is in negotiating contracts. Elise's clients benefit from these unique experiences and areas of expertise.

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SPEAKER BIOGRAPHIES

After living in both Cumberland and Portland, Elise and her husband Neil settled in Falmouth where they raised their two children, Hannah and Ike. She adores living in Falmouth, with its easy access to the water, great restaurants, extensive trails for hiking and cross-country skiing, golf courses, and quick access to Portland.

In her free time, Elise enjoys playing tennis, golf, pickleball, and boating on Casco Bay, and is often hiking or cross-country skiing on local trails. She also loves to surf year-round and has been able to surf and ski on the same day, one of the wonderful things about Maine with its beautiful mountains and coastline. She has also recently taken up fly fishing and learning French.

Active in many local organizations, Elise sits on the board of United Recovery Fund, the non-profit support of Maine Works, a company dedicated to providing dignified and meaningful work for those in recovery and emerging from the criminal justice system. She is also an Olympia Leadership Advisor, where she mentors high school girls in Poland Maine through the Olympia Snowe Leadership Institute, and is a member of MEREDA's local affairs committee.

Licensed in both Maine and Massachusetts, Elise also affiliates with Wallace & Co Sotheby's International Realty in Martha's Vineyard. Her family vacations in the wonderful West Chop community in Martha's Vineyard and realized she could add value to this community by guiding clients in purchasing and selling island properties. A strong proponent of the Sotheby's International Realty brand, Elise is part of several Sotheby's International Realty networking groups across the country and often visits affiliate offices during her travels in order to bring best practices and strategies from experts around the globe to her clients in Maine.

John Laliberte is Chief Executive Officer at Reveler Development, a full-service real estate investment, development, construction, and management company founded in Portland, Maine. Since joining the team in 2018, John has led Reveler's acquisition and development efforts with a focus on identifying strategic opportunities and delivering value for investors. From deal-sourcing to project stabilization, John leverages his keen understanding of local markets and demographic trends to unlock the full potential in every Reveler development. Under his leadership, Reveler has recently completed the development of vibrant new communities including The Armature and Lofts on the Levee, completed the historic rehabilitation at Riverdam in Biddeford, and has several additional developments underway including The Eddy in Biddeford. John grew up in Saco, Maine and graduated from Boston University.

Since 1992, and continuing to date, **Paul Peck** has practiced law at the firm of Drummond & Drummond, (DDLaw.com), one of Maine's oldest and well-respected small law firms.

Paul's areas of practice have evolved over the years from general litigation and criminal defense to lender representation and default resolution and litigation to currently mostly real estate development, acquisition and sales and business formation, general counsel and acquisitions and sales.

Paul is the founder of LWS Development LLC, (LWSDevelopment.com), a Maine real estate development

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SPEAKER BIOGRAPHIES

company that has developed significant multifamily housing, assisted living and resort communities.

Paul is a past president of MEREDA, the Maine Real Estate Development Association. MEREDA is Maine's leading real estate organization, whose mission is to support responsible development. Paul currently serves on the MEREDA board and is the co-chair of its public policy committee which actively advocates in Augusta for the real estate community.

Paul's other volunteer activities include currently serving as Vice President of Western Maine Mountains Housing a 501c nonprofit he helped form which is working on developing much needed workforce housing Maine's western mountain region. His past work includes serving as president of the Portland Chamber of Commerce, member of the Portland Zoning Board of Appeals, and member of Portland's Eastern Waterfront Planning Committee. Paul also helped coach his boys' baseball and football teams and served on the local Little League and football board of directors. Education: Hartwick College, BA 1983, cum laude. Dual Major: Economics and Political Science. Suffolk University Law School, JD 1986

Taryn Trefethen is General Manager, The Maine Mall – Brookfield Properties. Taryn started her Retail Property Management career as a Property Management Associate at The Maine Mall in 2014. During these years she focused a lot on tenant relationships, community outreach, and implementing creative traffic drivers to bring a wide range of customer to the mall.

In 2019, she was promoted to Associate General Manager and relocated to The Streets at Southpoint in Durham, North Carolina. This position allowed her to focus on the overall training in commercial real estate within Brookfield Properties. She traveled throughout the southeast, assisting with different properties, gaining a better understanding of property operations, security protocols, marketing approaches and different leasing focuses. She was also able to initiate a companywide training program for new hires within Property Management, specifically for the General Manager position. In 2021 she was promoted to General Manager at Columbiana Centre in Columbia, South Carolina. Although working in the south of the country was fun and stimulating, in 2023, she made the easy decision to move back to Maine and work at the mall where it all started, The Maine Mall!

Taryn was born, raised and educated in Maine, and has deep roots not only in the state but at the mall. Coming back home, although an easy choice personally, the move also presents an exciting opportunity to create ways to modernize a traditional indoor shopping center, to be as relevant in the next decade as it is today. The Maine Mall has always been a positive reflection of the community it serves, and she is thrilled to be involved in its foreseeable growth.

Nick Margitza is a Senior Director of Leasing at WS Development. He oversees WS' northern New England portfolio, which includes 25+ retail plazas, such as Marketplace Augusta, Merrymeeting Plaza in Brunswick, and Hannaford Plaza in South Portland. Since 2016, Nick has worked with a wide array of national, regional, and local retailers, restaurants, and service providers. Nick is an active member of ICSC.

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Originally from Waterville, ME, Nick is a proud alumnus of Bates College and now resides in Boston with his wife, Carolyn, daughter, Penelope, and dog, Crouton.

Jennifer Small joined Malone Commercial Brokers in 2000 for an internship that launched a successful lifelong career as a broker. Jenn has collaborated on some of Maine's most complex commercial real estate transactions. Her projects span from development/redevelopment to lease and sale of office, medical, retail, and industrial space throughout the state. Jenn has a proven 22-year track record of surpassing client expectations, including national companies, nonprofit organizations, and countless local businesses. Her in-depth market knowledge, strategic planning skills, and strong local connections facilitate a smooth process while helping clients meet their goals.

Jenn holds the CCIM (Certified Commercial Investment Member) designation earned by only 6% of individuals in the commercial and investment real estate industry nationwide. She serves as Vice President of the Maine Real Estate & Development Association (MEREDA) Board of Directors. She was recently inducted as Director with Maine Commercial Association of Realtors Board of Directors. Jenn is also affiliated with the National Association of Realtors. Jenn enjoys skiing, hiking, and all the year-round outdoor activities Maine has to offer. In her spare time, you can find her actively involved in her kids' sporting activities and spending time at Sugarloaf. She lives in Falmouth with her husband and two children.

Steve deCastro is the CEO of Maine Community Bank, a nearly \$3- billion-dollar mutual savings bank headquartered in Portland, Maine. Prior to joining the bank in 2016, Steve led Key Bank's Wealth Management group for New England, with \$1.3 billion under management. He has over 24 years of banking experience in the greater Portland market.

Active in the greater Portland community, deCastro is a board member of Educate Maine, Martins Point, Alford Scholarship Foundation and Chair of the USM Foundation board. He is past Chair of the United Way of Greater Portland Campaign and is a member of the Maine Bankers Association.

Steve attended Colby College and received his Master of Business Administration from Boston University.

Andrew Silsby is President & CEO of Kennebec Savings Bank, a long-standing community bank that supports the Central and Southern Maine region's economic and community development, while providing customers a great banking experience. Kennebec Savings Bank is a \$1.7 billion state-chartered community bank, part of a mutual organization, with a team of 207 employees. With locations throughout Maine in Augusta, Farmingdale, Freeport, Portland Waterville, and Winthrop. Kennebec Savings Bank has been proudly serving the people and businesses of Maine since 1870.

Andrew worked up through the ranks in banking, starting as a teller in 1986 and performing nearly every job function in banking over the past 38 years (Lending, Finance, Operations and Information Technology). Having worked at KSB for 31 years, he knows the bank inside and out and feels uniquely qualified to lead this institution that's so vitally important to the community.

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Andrew's long-term vision is of a vibrant, attractive, and successful region with opportunities for young people to put down roots and start a family. With such a strong community bank, the region will have the necessary capital it needs to facilitate growth and expansion. Andrew lives in Winthrop with his wife and enjoys all that the great Maine outdoors has to offer.

David Hulit is a Director of Business Development at Port 51 Lending, formerly Exos Lending, a national Non-Bank Preferred SBA (Small Business Administration) 7a Lender.

David started his career at Harvest Small Business Finance in sales and later worked in processing at Santander Bank focusing on SBA loans. After joining Ready Capital (the fourth largest SBA 7a lender in the country) in 2020, David went on to become one of the top producing SBA 7a lenders in the nation, closing over \$56mm in SBA 7a loans nationwide in 2023, specializing in Owner Occupied Commercial Real Estate and Business Acquisitions.

A lifelong Mainer, David was raised in Falmouth and Portland, where he went on to graduate from the University of Southern Maine. When not working, David is spending time with his wife Gwen and his baby girl Hopestill.

Kim Twitchell is the Senior Director of Affordable Housing for NBT Bank. She oversees the bank's affordable housing strategic growth initiatives for lending and investment activity around the footprint. Kim has over 35 years of commercial banking experience focused on commercial real estate and affordable housing financing. She is a member of the MEREDA Conference Committee, Avesta Housing Development's Board of Directors and Audit Committee, Community Housing of Maine's Board of Directors and Development Committee and Evernorth's NH Investment Committee. Kim is a graduate of Bowdoin College, has two adult children and lives in Cumberland with her husband.

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Facebook: fb.com/MEREDA2

Wifi Password: **PWMDT**

*#MEREDA2025 | #ForecastConversations | #MaineDevelopment
#MEREDATurns40 | #MaineCRE*

Speaker Presentations and other related materials from today's event are available on the MEREDA website using this QR Code.



<https://mereda.org/resources/documents/>

This QR code will provide you with a map of the Casco Bay Exhibit Hall.



<https://mereda.org/wp-content/uploads/2025/01/2025-Exhibitors-Confirmed.pdf>

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Maine Real Estate &
Development Association

Supporting Responsible Development

2025 Recognition Awards

Each year MEREDA is proud to recognize the individuals, businesses and organizations that have made a significant and lasting contribution to responsible real estate development in the state of Maine.

Robert B. Patterson, Jr. Founders' Award: Catherine & Jonathan Culley, Redfern Properties

This career recognition award acknowledges members of MEREDA who have distinguished themselves by making significant contributions to the real estate industry and/or to MEREDA over many years. Catherine and Jonathan Culley have been selected for their meaningful contributions to MEREDA and commitment to developing housing in Maine.



Catherine and Jonathan are co-founders and partners of Redfern Properties, a socially and environmentally-conscious real estate development firm focused on mixed-use and multi-family housing. Catherine provides vision and project management on all of Redfern's developments as well as a keen focus on sustainability issues. Meanwhile, Jonathan is managing partner and responsible for overall activities at the firm. Together, they have developed much needed housing for the state of Maine.

Their many successful projects have been a collaborative effort, highlighting the strength of local vendors in architectural, engineering, construction, brokerage, and banking services. They are also active in the community, with Jonathan serving as a past Board Chair of Avesta Housing, and currently serving on the boards of the Quality Housing Coalition, Waynflete School, and as a founding member of the new Hearts of Pine semi-pro soccer league.

Beyond their commitment to greater Portland, Catherine and Jonathan have also been strong supporters of MEREDA. Always willing to share their knowledge and expertise, their work demonstrates how to develop housing projects that also improve an overall quality of life. Catherine and Jonathan truly provide an exceptional model of responsible development in action. Their contributions to Maine are invaluable to all MEREDA members.

Volunteer of the Year Award: Marieke Thormann, Fathom Companies

MEREDA's success is largely based on the support and commitment from its volunteer members. Each year MEREDA presents its Volunteer of the Year Award to an individual who enthusiastically volunteers time and energy over the past year furthering MEREDA's mission. This year's award goes to Marieke Thormann of Fathom Companies.



Marieke is the Vice President of Development at Fathom Companies, a hospitality and real estate management company. A licensed Professional Engineer, Marieke brings over a decade of experience with multi-million-dollar construction and development projects ranging from boutique hotels and mixed-use urban high-rises to institutional offices and schools. As an engineer, Marieke is known for her strong problem-solving skills that empower her to collaboratively resolve complex challenges.

We are grateful for Marieke's many contributions to MEREDA. Participating on MEREDA's Conference Committee, Marieke jumped in with both feet, devoting time and energy to both help craft MEREDA's 2024 Spring Conference and participate as a moderator in the program. From taking the lead on several recent Morning Menu breakfast events to helping secure speakers and moderating one of the panel discussions at the 2025 Forecast Conference, Marieke has gone above and beyond for MEREDA. We are truly grateful for the expertise and time she has shared with our organization this past year. This award is well-deserved and we look forward to seeing the impact Marieke makes in the future!



Maine Real Estate &
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Each year MEREDA is proud to recognize the individuals, businesses and organizations that have made a significant and lasting contribution to responsible real estate development in the state of Maine.

Public Policy Award: Brandon J. Mazer, Perkins Thompson

This award is presented each year to those whose efforts have had a significant impact on public policy changes to benefit responsible real estate development in Maine. MEREDA is honored to present this year's Public Policy Award to the Brandon J. Mazer.



As Chair of the City of Portland's Planning Board, Brandon was instrumental throughout the recent rewrite of the City's land use code, a project known as ReCode. Throughout the complex and technical process, Brandon served as both a leader and conduit between the many parties involved, including the City Planning Department, the City Council, and city stakeholders. Brandon's exceptional commitment to Portland highlighted the strength of its community and residents, and his leadership serves as a model for lawmaking. We applaud Brandon for his part in making an impact - thanks to his efforts, the City Council recently adopted the recommendations from the ReCode process and passed a significantly modernized land use code. This is a win that will create many exciting opportunities for responsible development in Portland.

Brandon is an attorney at Perkins Thompson, where he is focused on municipal and business law. He currently serves as Corporation Counsel for the City of South Portland. Prior to joining Perkins Thompson he served as General Counsel for Shipyard Brewing Company for over seven years. He has served on the Portland Planning Board since 2017, serving as Chair for over four years.

During his tenure on the Planning Board, Brandon has helped approve over 1,600 units of housing. Brandon is also on the Board of Trustees for the Maine State Music Theatre and the Board of Directors for Special Olympics Maine.

President's Award: Mark Stasium, Camden National Bank

The President's Award is given by MEREDA's current President in recognition of someone who has made significant contributions to Maine and/or MEREDA. This year's President's Award is awarded to Mark Stasium, Camden National Bank.



MEREDA is honored to recognize the many contributions Mark has made over the years. He currently serves on MEREDA's Board of Directors, as well as the Executive and Conference Committees, as well as serving as MEREDA's Treasurer. His friendly and thoughtful personality naturally lends itself to this leadership role. As the Treasurer, he has been tasked with managing the budget, advising the Executive Committee and Board, providing monthly and annual reports, as well as planning and spending recommendations. Genuinely attentive and responsible, MEREDA is grateful to have had his input and guidance over the years. Mark also received MEREDA's 2020 Volunteer of the Year Award for his commitment and contributions to MEREDA.

Mark is the Director of Commercial Real Estate Banking at Camden National Bank. With 30+ years of experience in commercial lending and commercial credit, Mark manages a team responsible for originating commercial real estate loans and managing Camden's commercial real estate loan portfolio, primarily in Maine, New Hampshire, and Massachusetts.

A NOTABLE NIGHT WITH MEREDA

Mark your Calendar - May 14th



Each year, MEREDA identifies and recognizes the most noteworthy and significant Maine commercial development projects from the previous year. These Notable Projects embody MEREDA's mission of responsible development.

A Notable Night... A Social Celebration of 2024's Notable Projects and MEREDA's 40 years of supporting responsible development.

MEREDA will be recognizing the 2024 Notable Project Recipients at this very special awards ceremony and networking event on **May 14, 2025**.

MEREDA is Celebrating its 40th Anniversary!

We're excited to honor the 2024 Notable Projects on May 14th as we also celebrate our 40th Anniversary. This "social celebration" will be in place of our Spring Social. Make plans to join us - it will be a "Notable Night" with MEREDA!



Interested in Participating as a Supporter of this "Notable Night"?

Please reach out to Shelly R. Clark at the MEREDA Office.

JOIN MEREDA TODAY!



Maine Real Estate &
Development Association

Supporting Responsible Development

Legislative advocacy

Educational programs

Networking opportunities

The **Maine Real Estate & Development Association (MEREDA)** is the state's leading organization of commercial real estate owners, developers and related service providers. Founded in 1885, MEREDA now has nearly 360 members who employ thousands of Maine citizens and invest millions of dollars in the Maine economy each year.

Our mission is to promote an environment for responsible development and ownership of real estate throughout the state of Maine. MEREDA achieves its mission through legislative advocacy, regulatory oversight, educational programs and conferences, and networking opportunities for members of the commercial real estate industry.

Our membership encompasses a wide array of companies and organizations, including developers, builders, property managers, brokers, attorneys, lenders, engineers, land use consultants, architects, appraisers, affordable housing advocates, housing authorities and municipalities.

In uncertain times like these it is more important than ever that we work together as real estate professionals. MEREDA makes sure our legislators understand the role of responsible real estate development in the overall health of our economy. We are a valuable business development and networking tool for our members. And our monthly educational seminars provide members with timely and useful information.

Join MEREDA today. Visit us at www.mereda.org or call Shelly Clark at (207) 874-0801.

Want to Become More Involved in MEREDA's Initiatives? Consider Joining a Committee!



Maine Real Estate &
Development Association

Supporting Responsible Development

Participation on any one of MEREDA's volunteer committees gives members yet another opportunity to raise their profile within Maine's real estate community, and help the association meet its goals. Committee work allows members to play an active role in the association's affairs and all members are encouraged to participate. Committee work also provides an opportunity to work alongside others in the real estate industry and is a good networking

opportunity in itself.

- ◆ Our **Public Policy Committee** meets bi-weekly during legislative sessions. This committee reviews pending bills and regulations, identifying those of interest to our members, and works to ensure the real estate industry's concerns are considered. The committee labors to influence and shape the final form of proposed laws and regulations, and initiates new ones when circumstances warrant.
- ◆ The **Conference & Seminar Committee** meets monthly to develop ideas for upcoming conferences, seminars, and social events, suggesting possible topics, guest speakers, sponsors, formats, venues, and so on.
- ◆ Our **Membership & Marketing Committee** meets monthly to review membership statistics and trends, develops ways to retain current and recruit new members, looks for ways to further enhance the effectiveness of MEREDA's publications and other communications media and entertains ideas for new products and services that could be offered to the membership.
- ◆ The **DevelopME Committee** meets monthly to engage membership and create professional development opportunities within MEREDA for the next generation of industry professionals.
- ◆ The **Local Issues Committee** meets up to six-times per year to monitor and timely engage on local land use and development matters.

We encourage anyone who is interested in becoming involved in one, or more, of our committees, to reach out to Shelly R. Clark, Executive Director at MEREDA by calling 207-874-0801 or sending an email to info@mereda.org.

MEREDA MEMBERSHIP BENEFITS



Cornerstone \$5,500+

MEREDA's Cornerstone membership level includes exclusive benefits to member organizations that contribute significant amounts of both time and money to support MEREDA and its mission. For more information on the Cornerstone membership, please contact the MEREDA office at (207) 874-0801.



Sustainer \$2,750

Members at this level receive
Advocate benefits, PLUS:

- Up to 2 attendees FREE per annual conference
- Logo displayed at all MEREDA events
- Forecast Conference Exhibitor booth at a reduced price of \$550 (regularly \$1000)
- Logo on website / social media promotion
- Name listed on MEREDA letterhead



Advocate \$1,350

Members at this level receive
Supporter benefits, PLUS:

- Forecast Conference Exhibitor booth at a reduced price of \$850 (regularly \$1000)
- Eligibility to be considered for the MEREDA Board of Directors
- Logo on website
- Unlimited attendees at the member rate for MEREDA events



Supporter

Corporate \$600 (includes up to 5 individual members at the member rate)
Individual \$425 | **Municipal / Government** \$300 | **Full-Time Student** \$50

All members at the **Supporter** level and above receive:

- Advocacy – Legislative and regulatory lobbying efforts
- Education & Insight – Breakfast events and annual conference, MaineBiz Real Estate Insider newsletter and MEREDA Index
- Networking – Breakfast events, annual conferences and socials
- Inclusion in members-only events
- Opportunity to submit and place an article for consideration in the MaineBiz Insider newsletter
- Opportunity to reserve a Forecast Conference Exhibitor booth at \$1000

See over for details.

MEREDA MEMBERSHIP BENEFITS

Cornerstone \$5,500+	Sustainer \$2,750	Advocate \$1,350	Supporter \$50 - \$600*	Benefits
√				Thanks/mention at all MEREDA events
√				Exclusive invitation to “Cornerstone Circle” events
√				Legislative monitoring and updates on real estate-related bills
√				First right of refusal for sponsorship opportunities
5	2			Number of attendees FREE per annual conference
√	√			Logo displayed at all MEREDA events
√	√			Social media promotion
√	√			Logo or name listed on letterhead
√	√	√		Logo on website
√	√	√		Eligibility for consideration for MEREDA Board of Directors
FREE	\$550	\$850	\$1000	Opportunity to reserve a Forecast Conference Exhibitor Booth (\$1000 value)
√	√	√	√	Advocacy – Legislative and regulatory lobbying efforts
√	√	√	√	Education – Breakfast events and annual conferences
√	√	√	√	Industry Insight – <i>Mainebiz</i> Real Estate Insider newsletter and MEREDA Index
√	√	√	√	Inclusion in members-only events
UNLIMITED	UNLIMITED	UNLIMITED	5	Networking – Member rate for attendees to MEREDA events
√	√	√	√	Opportunity to submit an article for consideration in the <i>Mainebiz</i> Real Estate Insider newsletter

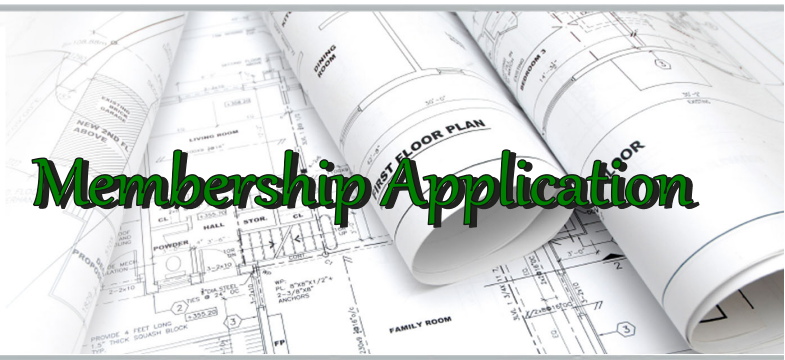
**See over for details.*



Maine Real Estate & Development Association

Supporting Responsible Development

Membership Application



Date / /

Name of Company or Organization

Mailing Address City State Zip

Street Address City State Zip

() -- () --

Telephone Fax

Type of Business (See Key to Business Type Categories) Number of Employees

Contact Person / Title Authorized By

Contact Person Email Address Company Web Site / Twitter Handle

Feel free to list others in your company (with email addresses) interested in receiving MEREDA Mailings

Business Type Categories:

AC Accountants / AD Advertising & Marketing / AP Appraisers / AR Architects / AR / CM Architects / Construction Management / AR / EN Architects / Engineers / AU Auction Companies / BA Banks/Mortgage/Finance Companies / BR Brokers / BR / DE Brokers / Developers / CB Contractors/Builders / CLN Cleaning Services / CM Construction Management / CO Consultants / DE Developers / EN Engineers / ENV Environmental / ENV / CO Environmental / Consulting Services / GH Gasoline & Heating Products Distribution / INS Insurance/Securities / LA Law Firms / LSA Landscape Architects / ME Media / MO Membership Organizations / MU Municipalities / NPD Non-Profit & Economic Development Corp. / PC Paper Companies / PMG Property Management / PMT Property Maintenance / REI Real Estate Investment/Management / RSE Research/Education / RET Retailers / SP Suppliers / ST State / SUR Surveyors / SVC Service Companies / TTL Title Companies / TTL / INS Title / Insurance Companies / UTIL Utilities / WD Wholesale Distributors / WM Waste Management/Recycling / Other: Please Describe

New Member Interests Please state your reasons for joining MEREDA and emphasize any issues that are of particular concern to you and your company. *Attach additional sheet if necessary.*

(please complete reverse side)

Membership Directory Active member companies will be featured in our Membership Directory located on the MEREDA web site at www.mereda.org, with a brief description of the company's products and services. There is no additional fee for this listing. (Only member companies with current dues are eligible to be featured in our Membership Directory.) Please use the space below for your company's profile. *Attach additional sheet if necessary.*

MEREDA Dues Structure: MEREDA has four levels of membership: Supporter, Advocate, Sustainer and Cornerstone. All members will receive the same foundational benefits of a MEREDA membership: Advocacy, Networking, and Education & Insight, however, this structure rewards members for their support of the organization with added benefits at each level. *Please see attached for details.*

<i>2025 Membership Benefit Levels</i>	<i>Minimum Annual Dues</i>
<input type="checkbox"/> I = Full Time Student	\$50
<input type="checkbox"/> II = Municipal / Government	\$300
<input type="checkbox"/> III = Individual	\$425
<input type="checkbox"/> IV = Corporate (<i>Includes up to 5 individual members</i>)	\$600
<input type="checkbox"/> V = Advocate	\$1350
<input type="checkbox"/> VI = Sustainer	\$2750
<input type="checkbox"/> VII = Cornerstone	\$5500+

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Committee Participation Committee work allows members to play an active role in the association's affairs. I (*and / or one of my colleagues*) would like to join one or more committee.

- Conference & Seminar
 Membership & Marketing
 Public Policy Committee
 DevelopME
 Local Issues Committee

Name(s) & Email(s) _____

MEREDA expects members to adhere to its mission of developing Maine responsibly. Application is subject to review of MEREDA Board and/or executive committee. MEREDA is organized under IRS Section 501 (c) (6) rules.

For federal income tax purposes, dues paid to the Maine Real Estate & Development Association (MEREDA) are deductible as a business expense, not as a charitable contribution. A portion of dues, however, is not deductible as an ordinary and necessary business expense to the extent that MEREDA engages in lobbying. The non-deductible portion of dues is 30 percent. MEREDA is tax exempt under IRS Section 501(c)(6).

Our Members are Invested in What we Do

MEREDA's strength has always come from the support and participation of its valued members. Their generous support is critical to continuing MEREDA's advocacy work, educational programming, and other services that are so vital to those in Maine's real estate industry

Thanks to their generosity, we have become the leading voice for responsible real estate development in Maine, representing hundreds of commercial real estate owners, developers and related businesses, from architects and engineers to property managers.

We are pleased to give special recognition to our Cornerstone and Sustainer Level Members. If you are interested in learning more about these levels of membership, please contact the MEREDA office.

Cornerstone Level Members:



J. B. BROWN & SONS

Our Members are Invested in What we Do

Sustainer Level Members:



LEGISLATIVE ADVOCACY

WINTER 2024



The 132nd Legislature Will Tackle Over 100 Bills Related to Housing

Of the 2,400 bills submitted to the 132nd Legislature, roughly 100 touch on or directly affect housing in Maine. This is a response to the serious housing crisis plaguing the state, which must build another 84,000 units by 2030 to have any hope of meeting the need. The crisis has grown as the Maine business community has added its voice to the chorus of demands for reform at both the state and local level to facilitate housing creation. The bills submitted touch on diverse policy areas and include proposals such as:

- ⇒ Increased density for workforce housing to address the missing middle (MEREDA bill).
- ⇒ Revisions to statutory municipal subdivision review to allow up to 5 units or lots (MEREDA bill).
- ⇒ Expansion of Maine Rehabilitation Tax Credit (MHRTC) to accelerate accrual of major project credit, improve small project program, add a homeowner credit, and eliminate the sunset date (MEREDA bill).
- ⇒ Creation of a statewide housing appeals board similar to New Hampshire's (sponsored by Rep. Traci Gere, House Chair of the Housing and Economic Development Committee).
- ⇒ Create a working group to study the overall purpose and potential reforms to statutory municipal subdivision review (GrowSmart bill).
- ⇒ Increased threshold for Site Location of Development Act review for subdivisions (DEP bill).
- ⇒ Examination of impact fees and relevant nexus to project (Maine State Chamber bill).
- ⇒ Review of building code cost drivers and barriers to housing creation (Maine State Chamber bill).
- ⇒ General fund bond proposals to dedicate to housing creation and infrastructure.
- ⇒ Incentivization of municipal housing creation by increasing discretionary DOT grant points to towns meetings goals (Maine State Chamber bill).
- ⇒ Improved market and regulatory conditions for manufactured housing.
- ⇒ AND MORE!

In addition to these legislative efforts, the Department of Environmental Protection (DEP) is working to start a third-party review program for projects that want to fast-track their permit application. DEP is also looking to increase the use of the permit by rule process, and to make other administrative and technical changes to streamline processes and increase the speed of project reviews.

Consulting Firm HR&A Tells Legislators that Housing Won't be Built Under Local Control

The consulting firm HR&A released their roadmap to creating Maine's housing future on January 28, 2025 and presented their findings to the Housing and Economic Development (HED) Committee. The complete report is over 80 pages long and includes 40 recommendations for improving Maine's regulatory, legal, workforce, and financial landscape to drive housing creation. The report focuses on three major areas:

1. Streamline processes and build capacity. The report recommends streamlining regulatory implementation, review, and project approvals at both the state and local levels. It also recommended looking at the barriers imposed by impact fees and the onerous review criteria of statutory municipal subdivision.

LEGISLATIVE ADVOCACY

WINTER 2024

2. Incentivize production and increase transparency. The report calls for the establishment of a statewide housing appeals process, and to develop state production targets with funding priorities for towns that meet their goals.
3. Strengthen the private sector. Recognizing the major workforce challenges facing the housing sector, the report focused on expanding opportunities for worker training. It also called out the lack of large-scale developers in Maine, noting that some local developers may need to scale up to meet the need. Finally, it emphasized the incentivization of creative technologies like mass timber and 3-d printing to provide attainable housing.

Almost all of the 40 recommendations in the report are reflected in the bills discussed above. The rollout of this report has set the tone for a productive legislative session on housing. MEREDA continues to be actively engaged in capitalizing on the critical findings in the report to move the needle for housing creation in Maine.

YOUR VOICE MATTERS

HELP US MAKE A DIFFERENCE

MEREDA members can have a real impact on these important issues. We encourage our members to become involved in our legislative affairs, to attend our meetings, receptions and outreach opportunities.

MEREDA makes advocacy a high priority and we work hard throughout the year to give our members a voice in the legislative process. If you are interested in becoming involved please contact MEREDA's Executive Director, Shelly R. Clark at the MEREDA office at (207) 874-0801.

Listen Up! MEREDA Matters Podcast!



MEREDA has a treat for you! The organization known for bringing people together for insightful discussions on all things related to real estate and development has taken to the airwaves, or rather the podcast waves!

MEREDA Matters is a podcast that highlights the people, stories, and relationships behind the responsible development happening in Maine.

Check it out! <https://mereda-matters.simplecast.com/>



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MEREDA's Upcoming Events

<p>January 30, 2025 - 8:30 - 10:00 AM</p>	<p>February 27, 2025 - 9:00 AM - 5:00 PM</p>
<p>Morning Menu Breakfast Seminar</p> <p>Introduction to Cost Segregation and 1031 Tax-Deferred Exchanges</p> <p>McGoldrick Career & Student Center 35 Bedford Street Portland, ME</p> 	<p>2025 Annual Forecast Conference & Member Showcase</p> <p>RETURNING TO: Holiday Inn By the Bay 88 Spring Street Portland, ME</p> 
<p>March 20, 2025 - 8:30 - 10:00 AM</p>	<p>April 9, 2025 - 11:30 AM - 1:00 PM</p>
<p>Morning Menu Breakfast Seminar</p> <p>How to Rezone a Town: Lessons Learned During ReCode</p> <p>McGoldrick Career & Student Center 35 Bedford Street Portland, ME</p> 	<p>DevelopME Committee's Lunch & Learn</p> <p>Title Insurance 101</p> <p>McGoldrick Career & Student Center 35 Bedford Street Portland, ME</p> 
<p>May 1, 2025 - 5:00 PM - 7:00 PM</p>	<p>May 14, 2025 - 5:00 PM - 7:00 PM</p>
<p>MEREDA's Strikes for Scholars Bowl-a-Thon Fundraiser!</p> <p>Bayside Bowl 58 Alder Street Portland, ME</p> 	<p>A Notable Night ... A Social Celebration of 2024's Notable Projects and MEREDA's 40 years of supporting responsible development.</p> <p>Hannaford Hall, Abromson Community Education Center 88 Bedford Street Portland, ME</p> 
<p>June 5, 2025 - 8:00 - 10:00 AM</p>	<p>October 23, 2025 - 8:30 - 12:30 AM</p>
<p>Morning Menu Breakfast Seminar</p> <p>Greater Bangor Economic Development Update</p> <p>Hollywood Casino 500 Main Street Bangor, ME</p> 	<p>MEREDA's Spring Conference Moves to October!</p> <p>Stay tuned for more information!</p> <p>Hannaford Hall Abromson Community Education Center - USM 88 Bedford Street Portland, ME</p>

Dates Subject to Change - Please visit www.mereda.org for the latest updates.



Maine Real Estate & Development Association

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MEREDA Mission Statement

The Maine Real Estate & Development Association (MEREDA) is an organization whose mission is to promote an environment for responsible development and ownership of real estate throughout the State.

MEREDA'S GUIDING PRINCIPLE:

Practicality, Predictability, and Clarity in Regulation

Invest Wisely.

MEREDA's Membership Returns:

Advocacy for Responsible Real Estate Development

Legislative Representation | Regulatory Monitoring

Business Networking Opportunities

Publications | Seminars & Conferences

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Maine Real Estate &
Development Association

Supporting Responsible Development

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