2025 Finance & Strategy Symposium

Westminster-Canterbury of the Blue Ridge
250 Pantops Mountain Rd, Charlottesville, VA 22911

November 19 | 9:00 am – 3:15 pm

8:30 am – 9:00 am | Check-in & Breakfast

9:00 am - 9:15 am | Welcome & Introductions

9:15 am - 10:05 am
What Does the One Big Beautiful Bill Mean for Organizations Serving Older Americans?
Presented by McGuire Woods
This session examines recent budget reconciliation legislation and its implications for providers, employees, and donors. Discussion will cover changes to Medicaid spending, tax policies affecting employee benefits, and new considerations for charitable giving, with attention to how these developments may influence organizational strategy, workforce planning, and financial stability.

10:05 am - 10:55 am
Industry Trends: What We are Seeing and Hearing
Presented by Ziegler
Drawing on insights from the Ziegler Strategy + Finance Conference and the latest LeadingAge Ziegler 200 report, this session reviews current demographic, economic, and consumer-driven shifts in the field. Examples from providers will illustrate how organizations are responding to industry pressures and positioning themselves for the future.

10:55 am – 11:10 am | Break

11:10 am – 12:00 pm
Financing Reporting Update and Prospective Financial Reporting Overview
Presented by Forvis Mazars
An overview of current and upcoming updates from FASB, AICPA, and other standard setters for 2025. The session will address both historical and prospective financial reporting, with attention to compliance requirements, communication with stakeholders, and the role of reporting in long-term planning.

12:20 pm - 1:10 pm
Lunch & Measure Twice, Cut Once, Then Cut Again – Can I Still Afford This Project?
Presented by JLL and Henderson
This session explores current and projected construction costs through 2026, considering the effects of tariffs, subcontractor availability, and broader market dynamics. Presenters will outline approaches for evaluating project feasibility and provide a framework to support decision-making around development timing and affordability.

1:10 pm – 1:20 pm | Break

1:20 pm – 2:10 pm
Emerging Health Insurance Trends and Challenges for Aging Service Providers
Presented by Scott Insurance
Findings from the 2025 Senior Living Employee Benefits Survey will serve as the basis for examining rising healthcare costs in the sector. The session will highlight the main drivers of expense growth and discuss strategies organizations are using to manage costs, including new plan designs and other employer-driven approaches.

2:10 pm – 3:00 pm
The Growth Imperative: Pathways to Strategy, Resilience, and Risk-Smart Leadership
Presented by CliftonLarsonAllen
This session outlines three approaches organizations can use to pursue growth while addressing risk. The discussion will focus on practical considerations for leaders and boards as they adapt to changing demands and economic conditions.

3:00 pm – 3:15 pm | Closing