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Jennifer Schwalm

Principal

Certified Public Accountant (CPA) in Pennsylvania

Jennifer has more than fifteen years of experience assisting senior living clients and lenders, in both the public and private sectors, with business solutions. These solutions include coordinating new developments and campus repositioning strategies to revitalize aging facilities and expand services based on financial and market driven strategies; benchmarking and identification of "best practice" solutions related to operations, development and regulatory issues; facilitating merger and acquisition transactions; participating in due diligence engagements; and directing prospective reporting engagements. Her expertise encompasses continuing care retirement communities, independent living, assisted living, nursing facilities, and home care services.

Jennifer's experience includes:

- Participation in/supervision of more than 100 development and repositioning engagements including market analysis and/or financial planning.

- Participation in/supervision of financial feasibility studies for various providers for inclusion in approximately \$1 billion of tax-exempt bond offerings.

- Participation in/supervision of operational assessments for providers resulting in approximately \$12 million of positive financial benefit.

- Identification, evaluation, and implementation of organizational strategies including alternative housing options (co-ops, condos), home health care initiatives, cultural change initiatives in nursing homes, and specialized nursing programs.

- Participation in/supervision of merger and acquisition transactions (due diligence and transaction facilitation) of approximately 20 entities for approximately \$1 billion of transactions.

- Participant in national market demand methodology task force formed to develop consistency and increased understanding among users of market demand terminology and methodology.

- Consultation with various providers and state regulatory boards on CCRC regulations and licensing requirements, with specific experience in approximately 20 states across the country.

Prior to joining Parente Randolph, Jennifer was at KPMG LLP for approximately 12 years where her career progressed to Director in the Senior Living Services Practice.

Jennifer has spoken before professional and educational groups at numerous conferences, including the American Association of Homes and Services for the Aging (AAHSA), PANPHA (Pennsylvania), NJANPHA (New Jersey), and various other state associations and provider affiliation groups.

Education

Jennifer earned a Bachelor of Science degree in Accounting from Shippensburg University.

Professional Affiliations

Jennifer is a member of the American and Pennsylvania Institutes of Certified Public Accountants, American Association of Homes for the Aging, and Pennsylvania Association of Nonprofit Homes for the Aging.

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