

## TUESDAY, SEPTEMBER 28<sup>TH</sup>

### Member Only Day

Location: Coeur d'Alene Resort

Inner Circle and Storelocal Co-op members are invited to participate in this Member Only time on Tuesday evening.

### 2:30pm – 5:30pm Registration

Location: Conference Lobby

Inner Circle and Storelocal Co-op members are invited to participate in this Member Only time on Tuesday evening.

### 5:00pm – 7:00pm Meet and Greet Reception

Location: Kidd Island Bay Room

Exclusive event for Inner Circle and Storelocal Co-op Members

## WEDNESDAY, SEPTEMBER 29<sup>TH</sup>

### 7:30am – 4:30pm Registration

Location: Conference Lobby

### 7:45 – 8:45am Breakfast

Location: Bay 4

### 9:00 – 9:15am Welcome to Self Storage Income

Location: Bay 2

- AJ Osborne - CEO, Self Storage Income/Cedar Creek Wealth
- Travis Morrow - CEO, Storelocal

### 9:15am – 10:00am Self Storage: The New Kid on the Block

Location: Bay 2

Why self storage? Hear how Self Storage is changing the commercial real estate world, how it's perceived and how that perception is changing fast.

- AJ Osborne - CEO, Self Storage Income/Cedar Creek Wealth

### 10:00am – 11:00am Why the Little Guy Matters...and Why They Should Be Working Together

Location: Bay 2

As consolidation continues, independent owners need each other more than ever. Learn how the cooperative has stepped in to serve the independents.

- Travis Morrow - CEO, Storelocal

### 11:00am – 11:50am Fireside Chat with KO Storage

Location: Bay 2

From zero to over 100 stores in 5 years? How'd they do that? Hear directly from the Founders of KO Storage about their amazing story.

- Andrew Freeman - Co-Founder, KO Storage
- Jon Marshalla - Co-Founder, KO Storage
- Moderator: Connor Skeen - Director of Project Management, Cedar Creek Wealth

### 12:00pm – 1:30pm Lunch

Location: Bay 4

### 1:30pm – 2:20pm Do You Know What Your Customers Want?

Location: Bay 2

Are you providing the experience customers want and expect? Be among the first to hear customer survey results about what the modern self storage customer demands.

- Christine DeBord - President, Nokē Smart Entry
- Travis Morrow - President, National Self Storage

## **2:20pm – 3:00pm Income Break: Open time to catch up on your own business**

### **3:00pm – 3:50pm Finding Deals**

**Location:** Bay 2

Self storage is as hot as it's ever been. Finding facilities has become more and more difficult. Learn how to comb through the listings to find the right deal for you.

- Brian Mullally - VP of Acquisition, Cedar Creek Wealth

### **4:00pm – 4:50pm Raising Capital Through Social Media**

**Location:** Bay 2

You've found your first deal, now how are you going to fund it? Learn tips and tricks to finding the funding to get your deal closed.

- Ashley Kehr - Rental Property Investor, Co-Host of Bigger Pockets Real Estate Rookie Podcast

- AJ Osborne - CEO, Self Storage Income/Cedar Creek Wealth

- Leka Devatha - President, Rehabit Homes

- Moderator: Ron Osborne - CEO, Keylock Storage

### **5:30pm Boat Transportation to Hagadone Event Center**

**Location:** Boardwalk Marina Dock

The Mish-an-Nock departs promptly at 5:30pm from the Boardwalk Marina Dock located on the Eastside of the Coeur d'Alene Resort

### **6:00pm – 7:00pm Welcome Reception**

**Location:** Hagadone Center

Entertainment: Justin James

Nationally recognized musician and entertainer specializing in acoustic classic country rock with fiddle, guitar and dynamic vocals.

### **7:00pm – 8:15pm Dinner**

**Location:** Hagadone Center

### **8:15pm – 9:00pm Guest Speaker**

**Location:** Hagadone Center

- Brandon Turner - Author, Entrepreneur and Real Estate Investor

- Introduced by AJ Osborne - CEO, Self Storage Income/Cedar Creek Wealth

### **9:30pm – 10:00pm Boat departs for the hotel**

## **THURSDAY, SEPTEMBER 30<sup>TH</sup>**

### **7:30am – 3:30pm Registration**

**Location:** Conference Lobby

### **8:15am – 9:15am Breakfast**

**Location:** Bay 4

### **9:30am – 10:40am Round Table Breakout Discussions**

**Location:** Bay 3-5

**Bridging the Gap: Deliver World Class Customer Experience with Technology and Call Center Solutions**

- Mike Roberts, XPS Solutions

### **SBA Financing for Self Storage 101**

- Bishesh Shrestha, Live Oak Bank

**Tenant Protection Programs: How to run them successfully, how to increase your income and how to avoid legal headaches**

- Chris Betteridge, Deans & Homer

**Using Smart Technology to Compete in the Self Storage Industry**

- John Bilton, Nokē Smart Entry by Janus International

**10:45am – 11:45am LIVE Self Storage Income Podcast**

Location: Bay 2

**A variety of topics on commercial real estate and all it has to offer. Self Storage, Multi-Family, Mobile Home Parks and more!**

- AJ Osborne - CEO, Self Storage Income/Cedar Creek Wealth

- Brandon Turner - Author, Entrepreneur, & Real Estate Investor

**11:45am – 1:00pm Lunch**

Location: Bay 4

**1:00pm – 1:50pm Two lawyers, Three Opinions**

Location: Bay 2

Two respected industry attorneys tackle the most important legal issues facing storage operators. Oh...did we mention, they don't always agree!

- Scott Zucker - Founding Partner, Weissman Zucker Euster Morochinik & Garber

- Jeffrey Greenberger - Partner, Greenberger & Brewer, LLP

- Moderator: Anne Mari DeCoster - COO, Storelocal

**2:00pm – 2:50pm State of the Industry**

Location: Bay 2

Hear from an industry legend on where self storage is today and where he thinks it's headed.

- Mike Burnam - President & CEO, StorageMart, LP

- Moderator: Lance Watkins - CEO, Tenant Inc.

**2:50pm – 3:30pm Consumer Trends & Best Practices**

Location: Boardwalk Marina Dock located @ Eastside of Resort

Recent data about trends, rates, occupancy, storage growth and best practices for running your facilities.

- Ron Osborne - CEO of Keylock Storage

**5:30pm – 8:00pm Cocktail Reception, Dinner and Cruise**

Location: Boardwalk Marina Dock

The Mish-an-Nock departs promptly at 5:30pm from the Boardwalk Marina Dock located on the Eastside of the Coeur d'Alene Resort

**FRIDAY, OCTOBER 1<sup>ST</sup>**

**8:00am – 9:30am Breakfast**

Location: Bay 4

**9:30am – 11:30am Facility Tour: Keylock Storage**

Location: 9906 N Government Way, Hayden, ID 83835



## GUEST SPEAKER

### **Brandon Turner**

Author, Entrepreneur & Real Estate Investor

Brandon Turner is an author, entrepreneur, and active real estate investor with more than 1,000 rental units and dozens of rehabs under his belt. He is the Vice President of BiggerPockets, co-host of The BiggerPockets Podcast, and author of multiple books, including The Book on Rental Property Investing and How to Invest in Real Estate.

Brandon has also been featured in numerous online and print publications--like Forbes.com, Entrepreneur.com, and Money Magazine--where he enjoys showing others the power and impact of real estate investing and financial freedom. A life-long adventurer, Brandon (along with his wife, daughter, and son) splits his time between his home in Hawaii and various other destinations around the globe.



## GUEST SPEAKER

### **MIKE BURNAM**

President & CIO - SMARTCO, L.P.

Mike Burnam is President and Chief Investment Officer at SMARTCO, L.P., which owns 230+ self-storage facilities with over 17.7 million square feet of storage space in the US, Canada and the UK. Mike was Chief Executive Officer at Storage Trust Realty, taking the company public in 1994 then in 1999, selling it to Public Storage.

Mr. Burnam was previously Chief Executive Officer and Trustee at Warburg StorageMart Partners, then navigating the takeover and eventual taking private of InStorage, publicly traded on the Toronto Stock Exchange, making StorageMart one of the largest self storage companies in Canada.



## GUEST SPEAKER

### **TRAVIS MORROW**

CEO - Storelocal®

Travis Morrow has been on a mission to modernize the self-storage industry since he started in 2004. As an intern at National Self Storage in Tucson, AZ, he started by creating an internal competition database that tracked pricing and occupancy of facilities across the 93 sub-markets NSS operated in.

In 2019 Morrow was appointed by the Storelocal Board of Directors to become the CEO of the co-op. He has overseen the transformation of Storelocal into a profitable organization focused on supporting independent owner operators. to leverage the power of the larger group and stay competitive in a rapidly consolidating space.

He is currently overseeing the development of National Self Storage's next facility and exploring other development and expansion opportunities, while helping other Storelocal members modernize their operations and facility performance through his role as Storelocal CEO.



**GUEST SPEAKER**

**AJ OSBORNE**

CEO – Cedar Creek Wealth

AJ Osborne is the All-American family man, entrepreneur, businessman, and investor. Owning and operating several diverse companies including an insurance brokerage, physical product ecommerce, software, and arguably his most notable self-storage businesses.

He owns and hosts the industry's largest self-storage podcast, "Self Storage Income" and also wrote the best-selling book, "The Investor's Guide to Growing Wealth in Self Storage". With his \$100MIL+ self-managed self-storage portfolio consisting of over 1.5 million square feet, AJ's successful investment and management strategies are sought after world-wide.



**GUEST SPEAKER**

**RON OSBORNE**

CEO – Keylock Storage

Co-Founder/President of Cedar Creek Wealth and the Owner/CEO of Keylock Storage, Ron has been an influential leader in the storage industry for over 17 years. He has served on the Store Local Cooperative Board of Directors during the early critical years of guiding them to financial success in addition to having served as chair of the Idaho Self Storage Association.

Ron, Keylock Storage, and the Cedar Creek Wealth team have since grown their self storage portfolio to currently include 13 facilities consisting of over 1 million square feet and are on track to expand to over 15+ facilities in 2021.



**GUEST SPEAKER**

**JEFFERY GREENBERGER**

Partner – Greenberger & Brewer, LLP

Jeffrey J. Greenberger is a Partner in the law firm of Greenberger & Brewer, LLP, where he concentrates his practice in Commercial Real Estate, with a particular concentration on the representation of self-storage, to design and implement legal procedures, policies, and other operational issues with a focus on litigation and liability reduction and/or avoidance. Jeffrey is a featured speaker at many national self-storage trade shows, and state association trade shows.



**GUEST SPEAKER**

**SCOTT ZUCKER**

Founding Partner – Greenberger & Brewer, LLP

Scott Zucker is a founding partner in the Atlanta law firm of Weissmann Zucker Euster Morochnik & Garber and has been practicing law since 1987. Scott represents self storage owners and managers throughout the country on legal matters including property development, facility construction, lease preparation, employment policies, and tenant claims defense. He also provides, on a consulting basis, advice to self storage companies in the areas of foreclosure and lien sales, premises liability, and loss control safeguards.