

SOLUTION PATH FOR REAL ESTATE INVESTORS

Wealth Preservation & Transfer | Tax & Estate Planning | Portfolio Analysis & Property Distributions

In-Depth Needs Analysis:

Cashflow Req's (current & future)
Tax Strategies & Estate Plan
Risk Tolerance & Management
Business Succession Planning
Legacy & Gifting Plans



Analysis of Current Real Estate:

Financial Performance & Returns
Cashflows (Current & Pro-forma)
Ownership Structure & Partnerships
Lease Abstraction & Reviews
Physical Assessment of Buildings
Title Records Research & Corrections
Management & Operations Review
Debt Financing Review & Options
Current Market Overview & Forecasts
Valuations:
Portfolio, Property & Partnership



Comparing Alternatives:

Financial Analysis & Comparisons of:
Real Estate Sales & 1031 Exchanges
Partner Buy-Outs
Property Renovation & Repositioning
Leasing & Tenant Challenges
Refinancing
Diversification of Property Types
Tenant-in-Common RE Investments
Direct Real Estate Investments



Transaction Services:

Investment Real Estate Sales
1031 Exchanges
Partnership Interest Valuations
Single & Portfolio Properties
Redistribution Negotiation & Agreements
Partner Buy-Out Negotiation & Agreements
Structured Sales
Buyer Representation for Investment
Real Estate *Nationwide*



Increased Cashflow
Greater Control of Assets
Capital Preservation
Peace of Mind



Building & Protecting Real Estate Wealth

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