



Realm Case Studies Portfolio Modeling and Transaction Support

- Institutional Investor Regional Mall Portfolio Financing – Responsible for updating 44 Regional Malls financial models located throughout North America in Argus. Engagement included integrating tenant and operating information from Excel, financial model updates, incorporation of global assumptions, quality assurance review and reconciliation to source data.
- Regional Mall Portfolio Disposition/Financing - Converted a 26 property Regional Mall portfolio from DYNA to Argus and performed CAM reconciliations on all financial models to source documentation provided.
- Pension Fund Advisor Portfolio Acquisition – Performed acquisition due diligence and modeling on 8.7 million square foot office portfolio within 7 business days for expedited closing. This included conversion of information from DYNA to Argus, Modification of Data, Update and Reconciliation of Models to Sources Data and Portfolio Sensitivity.
- Portfolio Valuation for Major Retail REIT – Established a portfolio valuation system and created financial models in DYNA for a 175 Power and Community Center REIT. Engagement included the establishment of valuation templates, importing property, tenant and operating data from property management system into templates, financial model completion, custom property and portfolio reporting and the establishment and reconciliation of all CAM recovery structures to source documentation provided.
- Major CBD Office REIT Portfolio Acquisition – Performed underwriting and financial models on CBD Office portfolio including over 5.5 million square feet. Included conversion of data from DYNA to Argus, updating all operating information and recovery structures with updated information within 8 days.
- Portfolio Management Platform for Institutional German Fund Advisor – Implemented a portfolio management system and acquisition platform for an institutional investment fund in Germany. Engagement included importing tenant and operating information provided in Excel from 3rd party fee managers for over 650 properties and completion of all financial models within 3 weeks. Models were transitioned from acquisitions to asset management and integrated into a portfolio budgeting, valuation, sensitivity and reporting environment. Engagement includes integration of 3rd party property management system into the solution.
- National Office REIT Portfolio Modeling and Management System - In conjunction with a major acquisition, modeled a 350 property office portfolio and established a portfolio management platform integrated with a 3rd party property management system. Portfolio included over 12,000 tenants and included reconciliation to source documents provided and operating budgets.