



# **NAREIM Jeff Barclay Fellows**

## **Class of 2021-2022**

### **Applications**

68 students, 11 schools

Chicago Booth; Columbia; DePaul; Harvard; MIT; New York Schack;  
Northwestern/Kellogg; Roosevelt; UCLA; USC; Wisconsin/Graaskamp



# **NAREIM Jeff Barclay Fellows**

## **Class of 2021-2022. Finalists**

- Javier DeLeon, USC, Marshall School of Business & Price School of Public Policy
- Winnie Hui, Columbia Business School
- Nicole Lam, DePaul University
- Daniel Mandel, University of Wisconsin-Madison, Wisconsin School of Business
- Samantha McPadden, Columbia University, Graduate School of Architecture, Planning and Preservation

# Javier De Leon

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## EDUCATION

### University of Southern California

Los Angeles, CA

*Master of Business Administration*, Marshall School of Business

May 2022

*Dollinger Master of Real Estate Development*, Sol Price School of Public Policy

May 2022

### Universidad Iberoamericana

Mexico City, Mexico

*Bachelor of Laws (LL.B.)*

2014

## EXPERIENCE

### Cirrus Real Estate Partners

New York, NY

(Real estate investment firms)

*Intern, Acquisitions / Investments (remote)*

February 2021 – Present

- Conduct financial modeling and valuation analysis for potential investments.
- Selected transaction experience:
  - Completed ~USD \$90 Million senior mortgage and mezzanine loan financing package in order to refinance a defaulted ~USD \$50 Million loan of One Thousand Museum, an 84 unit, 469,334 sq ft condominium tower in Miami, FL.

### Thor Urbana, Thor Equities Group

Mexico City, Mexico

Real estate investment fund/development company; 17 projects in Mexico and Belize with a capitalization of ~USD \$3 Billion.

*Legal Acquisitions Associate*

2017 – 2020

- Lead local and foreign teams in transactional law (M&A, Project Finance, Capital Markets) in all the stages of the company's investments and developments. Total deal value overseen ~USD \$500 Million.
- Structured buy-side transactions in collaboration with the company's investments department. My collaboration with this department resulted in being brought in as part of Chief Investment Officer's investment committee.
- Selected transaction experience:
  - Completed Joint-Venture deal with Mota-Engil for the ~USD \$150 Million development of a Ritz-Carlton Hotel and Residences in the Costa Canuva development (Nayarit Riviera), including the execution of a Hotel Management Agreement with Marriott International.
  - Completed ~USD \$120 Million acquisition of Marina Town Center, a luxury retail center in the Puerto Cancun development, with 485,000 sq ft of leasable space, including ~USD \$50 Million refinancing.

### Greenberg Traurig, LLP

Mexico City, Mexico

International full-service law firm with 40 locations worldwide and ~2,000 lawyers.

*Real Estate Legal Associate*

2015 – 2017

- Advised clients in the real estate sector. Entrusted by law firm partners with being the main point of contact with clients and directly handling negotiations with counterparties.
- Drafted framework deal documents and due diligence reports both in English and Spanish.
- Selected transaction experience:
  - Represented Amistad Global Development, an industrial real estate developer, in its ~USD \$125 Million issuance of structured development equity securities (CKDs) through the Mexican Stock Exchange (the company's first public security issuance).

## ADDITIONAL INFORMATION

- Citizenship: Dual U.S. and Mexican citizenship.
- Languages: English and Spanish, native.
- Interests: Connoisseur of the best taco spots in Los Angeles and Mexico City (i.e. best "Carnitas" taquerias - El Momo and Rincon Tarasco, respectively).

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate, May 2022

New York, NY

2020-Present

*Honors:* Real Estate Circle Fellowship (awarded to three 2<sup>nd</sup> year students who have demonstrated extraordinary leadership capability, academic excellence, and strong potential to be a future leader in the industry); Real Estate Portfolio Management Course Assistant (selected by faculty members to assist with course that focuses on implementation of private real estate strategies)

*Leadership:* Co-President, AVP of Events – Family Business Club; VP of Alumni & Mentorship, AVP of Alumni & Mentorship – Real Estate Association; Student Ambassador – Hermes Society; AVP of Finance – Hospitality and Travel Association

**UNIVERSITY OF SOUTHERN CALIFORNIA**

Los Angeles, CA

**BS**, Business Administration; **Minor**, Real Estate Development, December 2014

2011-2014

*Honors:* Magna cum laude (>3.7 GPA); Marshall School of Business Dean's List (>3.5 GPA); Darren Dahlman Memorial Endowed Scholar (merit-based scholarship); Jeffrey N. Ansbacher Memorial Endowed Scholar (merit-based scholarship)

*Leadership:* Senior Advisor, Vice President of Student Affairs, Treasurer, Director of Funding – Marshall Business Student Government; Investment Banking Mentor – Trojan Investing Society; Historian, Marketing Chair, Philanthropy Committee – Alpha Kappa Psi Professional Business Fraternity; Mini-Course Teacher – Joint Education Project

*Internships:* Finance and Accounting Undergraduate Associate (2013) – Disney ABC Television Group; Financial Analyst Intern (2013), Business Development Intern (2012) – Singpoli Capital Corporation; Wealth Management Intern (2012) – Merrill Lynch

**EXPERIENCE****INVESCO***Investment management firm (\$82.8bn real estate AUM) that invests in direct properties*

New York, NY

**MBA Real Estate Acquisitions & Debt Intern** (2021)

Summer 2021-Present

- Underwrite \$1.9bn worth of real estate equity and debt transactions across core / core-plus, value-add, and opportunistic strategies as well as various sectors, including multifamily, office, self-storage, life science, and industrial
- Develop underwriting models, co-author investment committee materials, present deals to directors, and lead market landscape update discussions with brokers and business plan evaluations with asset managers
- Select transaction experience (16 underwritten deals):
  - \$124mm refinancing transaction for a 6-asset portfolio located in West Palm Beach, FL; Central PA; and Somerset, NJ totaling 1.2mm sqft
  - \$91mm acquisition of a 252-unit core multifamily asset in Englewood, NJ

**DIVCOWEST***Vertically-integrated owner operator (\$8.1bn AUM) focused on office and lab assets in bi-coastal markets*

San Francisco, CA

**Capital Strategies & Formation: Associate Director** (2020), **Associate** (2018-2019)

2018-2020

- Spearheaded creation, production, and maintenance of marketing materials such as pitchbooks, due diligence questionnaires, and investment memorandums for fundraises worth ~\$2bn for a value-add fund and \$750mm for 3 core / core-plus separate accounts
- Analyzed and incorporated real estate metrics to ensure timely responses for an upwards of ~70 limited partners
- Presented weekly updates on existing investor base and prospective relationships to the senior management team
- Led yearly summer internship program by organizing educational sessions and mentoring 4-6 summer analysts on best practices

**J.P. MORGAN**

San Francisco, CA

*Technology Equity Capital Markets group – raised capital through IPO and follow-on offerings*

2014-2017

**TMT ECM Investment Banking: Analyst** (2015-2017), **Summer Analyst** (2014)

- Executed IPO and follow-on offerings for 100+ clients in the software, internet, and semi-conductor sectors by envisioning and creating bake-off pitches as well as execution strategies as the lead Analyst without Associate to Vice President-level involvement
- Select transaction experience (16 completed deals):
  - Twilio's \$173mm IPO and \$322mm follow-on offering – completed detailed analyses for topics such as dual-class structure, exchange considerations, and shareholder evolution trends; tracked valuation changes; updated IPO valuation matrix
  - Snap's \$3.9bn IPO – conducted thorough investor targeting; evaluated pricing and performance of precedent \$1bn+ IPOs; assessed no-vote / low-vote structure and staggered lock-ups for the company's IPO
- Ranked at top of Investment Banking Analyst class and received Class of 2018 Investment Banking Associate promotion

**ADDITIONAL INFORMATION***Certifications and Skills:* Series 79; Series 63; Argus Enterprise Training Certification Program (in progress)

*Volunteer Work:* USC Alumni Board of San Francisco (planned fundraisers, community service events, and socials for USC Alumni); Exploratorium Museum (volunteered at interactive science, technology, and arts museum based in San Francisco and hosted events for ~200 members); piano (raised \$3k to fund 4 Chinese orphans' cleft lip operations by selling CDs)

*Interests:* Art; charcuterie boards; event planning; oil painting; TaeKwonDo (black belt); traveling; yoga



# NICOLE PAIGE LAM

2045 North Kedzie Ave, Chicago IL 60647 | Phone: (917) 734-8146 | Email: njlam9@gmail.com

## EDUCATION

	Year
<b>DePaul University</b> , Chicago, IL	Present
• Master's of Science in Real Estate Candidate	
<b>University of Pennsylvania</b> , Philadelphia, PA	2015
• Bachelor of Arts, <i>Magna Cum Laude</i> , Philosophy, Politics & Economics (PPE), GPA: 3.66	
<b>University of New South Wales</b> , Sydney, Australia, Junior Year Study Abroad	2014
<b>The Brearley School</b> , New York, NY	2011

## WORK EXPERIENCE

<b>CUSHMAN &amp; WAKEFIELD</b> , Chicago, IL	
<i>Senior Associate, Asset Management</i>	2021-Present
• Responsible for providing strategic direction and maximizing of property performance for a portfolio of real estate assets	
• Partner with third-party leasing teams to develop marketing strategies and lead tenant lease negotiations	
• Prepare excel-based financial analyses for various lease scenarios to support leasing recommendations	
• Update internal Argus models and perform valuation analyses, including hold/sell analyses and capital budgeting analyses	
• Produce quarterly investor reports to provide ownership with status on property operations	
• Assist in acquisition due diligence and subsequent closing for properties being purchased by clients	
<b>SILVERSTEIN PROPERTIES, INC.</b> , New York, NY	
<i>Associate, Acquisitions and Development</i>	2019-2021
• Focus on acquisition, investment, and development for Silverstein Properties, a privately held vertically integrated NYC-based developer best known for developing and rebuilding the World Trade Center site	
• Create excel-based acquisition and development models, revenue and expense projections, and other analyses across condo, office, residential rental and retail projects, including return on investment modeling, complex joint venture partnership structures, market analysis, lease analysis, feasibility, budget creation and project scope	
• Coordinate asset dispositions, transaction financing, and asset refinancing alongside external investment sales and debt teams	
• Assist in capital raising including deal-specific equity, programmatic joint-venture equity, and life science fund capital raising	
• Assist principals in creating and presenting investment committee memorandums for Investment Committee approval	
• Member of the Silverstein Properties Diversity and Inclusion Committee	
<b>LASALLE INVESTMENT MANAGEMENT</b> , Chicago, IL	2016-2019
<i>Senior Analyst, Strategic Investments Group</i>	
• Evaluate and execute real estate co-investment transactions on behalf of institutional separate account clients	
• Support team members in market research, data analysis, and due diligence of market information and comparable transactions	
• Prepare Investment Committee presentations based on internal underwriting, market analysis, risks and mitigants	
• Maintain portfolio level models and evaluate investment performance and returns	
• Produce quarterly reports for investors on asset level and portfolio level performance and returns	
• Perform complex financial analyses, including Excel-based pro formas and cash flow projections	
• Selected to record minutes at weekly North American Investment Committee meetings	
<b>GOLDMAN SACHS</b> , Chicago, IL	2015-2016
<i>Analyst, Asset Management</i>	
• Analyze mutual fund sales activity and produce weekly performance and insights reports for senior management	
• Provide competitive analysis reports on advantages of Goldman funds and ETFs vs. competitor funds for end-client use	
• Support regional salespeople by updating and maintaining Salesforce data	
• Present ETF and mutual fund pitches to sales desk and management	

## ACTIVITIES / LEADERSHIP

<b>Urban Land Institute (ULI)</b>	2019-Present
• Women's Leadership Initiative (WLI) Scholarship Committee Member – Events Committee	
<b>SEO – Sponsors for Educational Opportunity</b>	2020
• Industry Specialist (Wealth Management) – Provide ongoing career and interview support for high achieving college students from underrepresented communities for entrance into wealth management internship and analyst programs	
<b>One Million Degrees</b>	2017-Present
• Coach – Partner with community college students to help set and achieve academic and professional goals	

**Skills:** Excel, Financial Modeling, Lease Analysis, Argus Enterprise & DCF, PowerPoint, CoStar, RCA, Kardin, Yardi, VTS

**Other Interests:** Live Music, Violin, Trying New Restaurants, Cooking, Reading, Gardening, Traveling

# DANIEL MANDEL

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## PROFILE

*Accomplished leader with experience underwriting nationwide loans and developments. Proficient at analyzing markets, finances, and data to deliver actionable insights for improved decision making. Believes in building communities through responsible capital sources and have served on a non-profit entity issuing interest free loans. Skilled at cultivating and maintaining strong relationships.*

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2020 - 2022

*Master of Business Administration Candidate*

- Specialization: Real Estate ("RE") in the James A. Graaskamp Center for Real Estate. Certificate in Business Analytics.
- Incoming teaching assistant for hedge fund manager Jim Chanos (Kynikos Associates, LP) in fall Financial Fraud Forensic Approach for 40 graduate students, Dr. Erwan Quintin's Corporation Finance for 220 undergraduates, and Dr. Oliver Levine's Corporation Finance.
- Co-Vice President and Future Co-President of the University of Wisconsin-Madison Real Estate Club.
- GPA 3.97/4.00. Recipient "Together Forward" Merit Scholarship. Winner of the Ignite Team Case Challenge.
- Key Coursework: RE Excel Modeling, RE Private Equity I-II, RE Commercial Development, Negotiations, Affordable Housing Development, Risk Financing Techniques, Financial Modeling in Excel, Data Visualization for Business Analytics, Risk Analytics and Behavioral Science.

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2012 - 2015

*Bachelor of Business Administration*

- Majors: Real Estate and Urban Land Economics; Economics. Recipient Graduation with Distinction (Top 10%). "Curt S. Culver" Merit Scholarship. **Publication:** Mandel, Daniel (2015), "Urban Rail Transit Expansions", in Urban Land Economics, Springer International.
- Key Coursework: Retail and Office Modeling using ARGUS and Excel, RE Presentation and Investment Analysis, RE Capital Markets, RE Healthcare, RE Site Layout and Building Floor Plate Design, RE Valuation, RE Law, RE Finance, Financial Investment Theory and Practice.

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## PROFESSIONAL EXPERIENCE

### TerraLane Communities, Phoenix, AZ

03/21 - 08/21

*Summer Real Estate Associate*

- Created new processes and reports to update stakeholders on the progress for five (5) new horizontal multi-family communities with total development costs over \$240MM while underwriting five (5) new development opportunities with total development costs over \$330MM.
- Constructed a sale vs. refinance analysis to assist ownership evaluate options to unlock cash for new development opportunities.

### BB Living Residential, Phoenix, AZ

09/19 - 05/20

*Vice President of Data Analytics*

- Facilitated eight (8) monthly local land acquisition calls with national partners to receive proprietary housing and land activity data in order to monitor new opportunities, analyze submarkets, and underwrite new nationwide land acquisitions for communities of build-to-rent single-family homes with total costs over \$500MM.
- Prepared two (2) comprehensive land acquisition investment committee memos for new community developments valued over \$80MM to expand firm's development pipeline.
- Crafted recommendations to homeowner's associations (HOA) to reduce HOA expenses for communities under contract by examining community legal documents resulting in stronger deal-level financial returns.
- Led search for multi-family data source by evaluating proposals, negotiated with best vendor to obtain a custom solution while reducing cost by \$8,000 annually, initiating data integration, and optimizing investment modeling and monitoring.

### KeyBank Real Estate Capital, Phoenix, AZ

12/17 - 05/19

*Underwriter*

- Underwrote over 50 multi-family loans totaling \$890MM for purchase by the "agencies" (Fannie Mae, Freddie Mac) by identifying problems, proposing solutions, conducting due diligence, and leading coordination calls generating over \$17MM in revenue.
- Specialized agency underwriting of 15 loan assumptions totaling more than \$200MM by working with buyers, sellers, and investors to identify problems and propose solutions creating over \$1MM in revenue.

### KeyBank Real Estate Capital, Phoenix, AZ

07/15 - 11/17

*Senior Production Analyst*

- Collaborated with deal team and clients to originate over \$2.4B in multi-family loans for purchase by "third-party investors" (agencies, life insurance companies, and FHA) by scrutinizing opportunities and composing submissions achieving over \$47MM in revenue.
- Trained, mentored, and distributed workflow to five (5) new analysts resulting in improved team productivity.
- Established new technological efficiency initiatives resulting in streamlined production process and time savings.

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## LEADERSHIP EXPERIENCE / PROFESSIONAL ASSOCIATIONS

- Wisconsin Real Estate Alumni Association Member and Mentor to current students. 01/14 - Present
- Urban Land Institute Member and Arizona Partnership Forum Young Leader. 05/17 - Present
- Non-profit: Board member and committee member spearheading new community outreach initiatives. 07/17 - 08/21

**INTERESTS:** golf, reading the *Wall Street Journal*, swimming, watching comedy shows, spending time with family and friends

# SAMANTHA MCPADDEN

LICENSED ARCHITECT

70 West 68th St.  
Apt. 1F  
New York, NY  
10023

## EDUCATION

Columbia University, Graduate School  
of Architecture, Planning and Preservation.  
M.S Real Estate Development '22 Candidate

University of North Carolina at Charlotte  
Bachelor of Architecture , GPA: 4.0  
Bachelor of Arts in Architecture , GPA: 3.8  
Art History Minor, Magna Cum Laude  
Graduated May 2015

Central European Cities Study Abroad  
Munich, Vienna, Budapest,  
Krakow, Prague, Berlin  
Jewish Heritage and Central European Cities  
Summer 2012

## REGISTRATION

National Council of Architectural Registration  
Boards, Registered Architect

North Carolina Board of Architecture,  
Registered Architect

## AWARDS + HONORS

AIA Henry Adams Medal  
Highest cumulative grade point average of  
graduating students in the  
School of Architecture, Spring 2015

Arts and Architecture Honors Program  
Active Member and Honoree, Completed final  
semester-long thesis, 2010-2014

Excellence in Architectural History  
Graduation Book Award, Spring 2014

The Boardman Architecture Honor Fellowship  
Scholarship Recipient, Spring 2014

School of Architecture Prospectus  
Second year project published in  
School of Architecture publication, 2012

## EXPERIENCE

### Fleetwood Fernandez Architects, Los Angeles, CA

Project Architect, 2018 - present

- Design and manage twelve small to medium scale, multi-million dollar projects, including a \$800 / square foot single family prefab, off-grid home and a 27,000 square foot restaurant with subterranean parking deck.
- Coordinate design decisions cross-functionally between consultants, engineers, and clients through all phases of design from conceptual to contract administration.
- Implement scheduling and bid tracking processes to facilitate project Value Engineering.
- Ensure that designs are within federal and local codes, standards, and procedures.
- Produce graphic representation of projects, working on a marketing strategy for the redesign of the company website and rebranding of visual identity of firm.
- Key Projects:
  - Hillstone Restaurant, Del Mar, CA, 2015 - ongoing
  - Saint-Marc Hillside Residence, Haiti, 2019 - ongoing
  - Bamboo Lane Live-Work, Los Angeles, CA, 2019 - ongoing

Designer, 2015 - 2018

- Assisted in production of construction documents while applying knowledge of zoning and planning regulations.
- Spearheaded five international design competitions.

### Nka Foundation, Ghana

Co-Project Manager and Designer, June 2017 - September 2017

- Designed and built a competition-winning design project in rural Ghana using earth construction techniques in rural village.
- Recruited + selected a team of 20 international volunteers and raised capital using crowdsourcing to build a 1,000 ft<sup>2</sup> clinic.
- Created + delegated project schedule to a team of 6 local builders and 20 volunteers. Coordinate with village leadership.

### Rural Initiative Partnership, North Carolina

Preservation Designer, May 2014 - May 2015

- Worked with a team to develop, design, and present preservation strategies involving modernizing historic Rosenwald schools throughout rural North Carolina.

## VOLUNTEER

Impact Investing Club, Social Chair, 2021 - present

Collaborate with other members of the executive committee and board of directors to create and execute events for the club constituency.

All Together LA, Neighborhood Volunteer, 2020 - 2021

Safely provide 2 disabled neighbors with weekly groceries and medicine during Covid 19 pandemic.

Downtown Women's Center, Kitchen Assistant, 2019 - 2020

Serve breakfast weekly to 60 women experiencing homelessness in Skid Row, Located in Los Angeles, CA.

Freedom by Design, Development Manager, 2012 - 2013

Organize volunteers to build an outdoor learning center for Charlotte, NC Montessori School.

# **Columbia University**

## **Columbia Business School**

- Preet Aneja
- Andres Arozarena
- Arshad Balwa
- Jonathan Braun
- Angie Cho
- Kourosh Fathi
- Huichun Gao
- Javaughn Griffin
- Vivienne Hesha
- Kathryn Hogan
- Winnie Hui
- Zheng Jin
- Joseph Ju
- Lihan Kao
- Clifford Killips
- Thomas Leigh
- Nina Madison
- Manuela Manrique
- Arsean Maqami
- Samantha McPadden
- Robin Mesirow
- Mason Oh
- Nikolaos Papageorgiou
- Dominic Perkaj
- Gilad Rabina
- Rene Acuna Sapiain
- Kennedy Shields
- Vivian Teng
- Krystel Terzis
- Daniel Vasserman
- Lijing Xie

# PREET ANEJA

255 West 94<sup>th</sup> Street, New York | (347) 574 4274 | preet.aneja@columbia.edu | ca.linkedin.com/in/preetaneja

## WORK EXPERIENCE

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**Crestpoint Real Estate Investments – Connor, Clark & Lunn Financial Group, Toronto, ON**

*June 2018 – May 2021*

*Analyst, Acquisitions and Asset Management*

- Underwrote and analyzed real estate investment opportunities (~C\$1.8B to date); performed market and asset-specific due diligence to identify investment considerations and risks; led to 11 deals proceeding to Investment Committee (IC) approval deploying C\$636M in capital
- Developed and executed leasing, capital and development plans for a C\$1.6B portfolio spanning retail, office, industrial and multi-family asset classes; monitored and evaluated portfolio performance including quarterly valuations, reporting and hold-sell analyses
- Led Crestpoint's quarterly valuations and client reporting processes; managed analysts, external appraisers, senior fund management and investors; has resulted in consistent Advisory Committee approval of fund's NAV and reporting

### Select Transaction Experience

- ***Crestpoint and PSP Investments' acquisition of a 50% interest in Stoney Industrial Centre and StoneGate Landing in Calgary, Canada for C\$265 million***
  - Constructed acquisition model with various scenarios and sensitivity analyses, conducted market and portfolio due diligence, prepared IC memoranda; Diligence findings and acquisition model were used in negotiations to justify a \$22M purchase price reduction, representing 8% of total investment
- ***Crestpoint's acquisition of a 50% interest in Shopify's Headquarters (234 Laurier Avenue) in Ottawa, Canada for C\$102 million***
  - Led the financial modeling, due diligence and asset financing processes, assisted with legal negotiations and co-owner and tenant communications, prepared IC memoranda and participated in subsequent IC discussions

**Oxford Properties Group, Toronto, ON**

*Summer 2017*

*Summer Analyst, Investments and Finance*

- Underwrote C\$335M worth of real estate opportunities (direct asset investments and JVs); compiled industry, market and asset-level data; assisted in preparing memoranda for IC discussions; led to two deals proceeding to IC approval
- Assisted on several projects with the Retail Asset Management, Hotels and Leasing groups; analyzed a Valet Lounge opportunity at Yorkdale Mall and developed detailed proposals for IBM's potential anchor tenancy at 30 Bay Street, Toronto

### Select Transaction Experience

- ***Oxford Properties and CPPIB's disposition of Constitution Square in Ottawa, Canada for C\$480 million***
  - Reviewed and revised various due diligence items and assisted in preparation of IC memoranda, models and presentation
- ***Oxford Properties and Madison International Realty's acquisition of Sony Center in Berlin, Germany for €1.1 billion***
  - Constructed a financing model and prepared memoranda to support the execution of Oxford's asset financing strategy

## EDUCATION

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**Columbia University, New York, NY**

*June 2021 – Present*

*Masters of Science in Real Estate Development Candidate, 2022*

- Mentorship Chair for the Women in Real Estate Development Club and Social Chair for the Real Estate Private Equity Club

**Ivey Business School, Western University, London, ON**

*2018*

*Bachelor of Arts, Honors Business Administration (HBA) with distinction*

- 3.7/4.0 GPA with 3.7 in Finance, Decision Making with Analytics and Strategic Management; 4.0 in Commercial Real Estate
- Western International Learning Award for study at National University of Singapore (January–June 2018) and Hong Kong University (June 2016), Dean's Honor List for standing in top 25% of class (2013–2018)

## OTHER ACTIVITIES AND INTERESTS

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**Project Destined, Mentor for Team BentallGreenOak**

*June 2021 – Present*

- Mentored a group of ten college students through bi-weekly investment pitches to industry professionals, providing insights on topics including market research, asset valuation and deal financing; resulted in Team BentallGreenOak placing first in national championships

**Her Head is in the Clouds, Co-Founder**

*May 2020 – Present*

- Co-created a business plan for apparel and accessory sales; oversaw design, manufacturing and fulfilment processes; launched e-commerce strategy using Shopify and Instagram; drove 850+ unique visitors, leading to 70 customers and \$1,700 in revenue

**Other Organizations:** ULI (WLI Special Projects Committee Member), NAIOP (Mentee, Mentor), CREW (Member of Scholarship Committee), The Leacock Foundation (Member of Young Professionals of Leacock), Alpha Phi International Fraternity (Alumna, Mentor)

**Languages:** Professional fluency in English, French, Hindi and Punjabi

**Interests:** Food and Wine, Travelling, Cake Decorating, Spinning, Podcasts, Non-Fiction Literature, Interior Design

# NICOLE PAIGE LAM

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## EDUCATION

	Year
<b>DePaul University</b> , Chicago, IL	Present
• Master's of Science in Real Estate Candidate	
<b>University of Pennsylvania</b> , Philadelphia, PA	2015
• Bachelor of Arts, <i>Magna Cum Laude</i> , Philosophy, Politics & Economics (PPE), GPA: 3.66	
<b>University of New South Wales</b> , Sydney, Australia, Junior Year Study Abroad	2014
<b>The Brearley School</b> , New York, NY	2011

## WORK EXPERIENCE

### **CUSHMAN & WAKEFIELD**, Chicago, IL

#### **Senior Associate, Asset Management** 2021-Present

- Responsible for providing strategic direction and maximizing of property performance for a portfolio of real estate assets
- Partner with third-party leasing teams to develop marketing strategies and lead tenant lease negotiations
- Prepare excel-based financial analyses for various lease scenarios to support leasing recommendations
- Update internal Argus models and perform valuation analyses, including hold/sell analyses and capital budgeting analyses
- Produce quarterly investor reports to provide ownership with status on property operations
- Assist in acquisition due diligence and subsequent closing for properties being purchased by clients

### **SILVERSTEIN PROPERTIES, INC.**, New York, NY

#### **Associate, Acquisitions and Development** 2019-2021

- Focus on acquisition, investment, and development for Silverstein Properties, a privately held vertically integrated NYC-based developer best known for developing and rebuilding the World Trade Center site
- Create excel-based acquisition and development models, revenue and expense projections, and other analyses across condo, office, residential rental and retail projects, including return on investment modeling, complex joint venture partnership structures, market analysis, lease analysis, feasibility, budget creation and project scope
- Coordinate asset dispositions, transaction financing, and asset refinancing alongside external investment sales and debt teams
- Assist in capital raising including deal-specific equity, programmatic joint-venture equity, and life science fund capital raising
- Assist principals in creating and presenting investment committee memorandums for Investment Committee approval
- Member of the Silverstein Properties Diversity and Inclusion Committee

### **LASALLE INVESTMENT MANAGEMENT**, Chicago, IL

#### **Senior Analyst, Strategic Investments Group** 2016-2019

- Evaluate and execute real estate co-investment transactions on behalf of institutional separate account clients
- Support team members in market research, data analysis, and due diligence of market information and comparable transactions
- Prepare Investment Committee presentations based on internal underwriting, market analysis, risks and mitigants
- Maintain portfolio level models and evaluate investment performance and returns
- Produce quarterly reports for investors on asset level and portfolio level performance and returns
- Perform complex financial analyses, including Excel-based pro formas and cash flow projections
- Selected to record minutes at weekly North American Investment Committee meetings

### **GOLDMAN SACHS**, Chicago, IL

#### **Analyst, Asset Management** 2015-2016

- Analyze mutual fund sales activity and produce weekly performance and insights reports for senior management
- Provide competitive analysis reports on advantages of Goldman funds and ETFs vs. competitor funds for end-client use
- Support regional salespeople by updating and maintaining Salesforce data
- Present ETF and mutual fund pitches to sales desk and management

## ACTIVITIES / LEADERSHIP

### **Urban Land Institute (ULI)**

2019-Present

- Women's Leadership Initiative (WLI) Scholarship Committee Member – Events Committee

### **SEO – Sponsors for Educational Opportunity**

2020

- Industry Specialist (Wealth Management) – Provide ongoing career and interview support for high achieving college students from underrepresented communities for entrance into wealth management internship and analyst programs

### **One Million Degrees**

2017-Present

- Coach – Partner with community college students to help set and achieve academic and professional goals

**Skills:** Excel, Financial Modeling, Lease Analysis, Argus Enterprise & DCF, PowerPoint, CoStar, RCA, Kardin, Yardi, VTS

**Other Interests:** Live Music, Violin, Trying New Restaurants, Cooking, Reading, Gardening, Traveling

**EDUCATION****COLUMBIA BUSINESS SCHOOL****Candidate for MBA**, Real Estate Finance, May 2023

New York, NY

2021-Present

**UNIVERSIDAD IBEROAMERICANA****Bachelor of Science**, Industrial Engineering, Dec 2015 GPA: 9.5/10.0

Mexico City, Mexico

2011-2015

*Honors*: Honorable Mention (Top 5-10% of class) for academic excellence

Outstanding Performance (CENEVAL EGEL – IINDU)

**STANFORD UNIVERSITY, Graduate School of Business**

Summer Institute for General Management

Stanford, CA

2016-2016

**EXPERIENCE****AROZARENA • PARAMO***Family-owned leading luxury real estate construction company in Mexico City*

Mexico City, Mexico

2019-2021

**Investment and Development Associate**

- Created the Development division, built a team of four to diversify and vertically integrate the firm.
- Executed underwriting and due diligence and managed the approval of USD\$25M for the development of residential buildings in “Condesa” and “Roma”, Mexico City’s “Soho” and in premium *Polanco*, Mexico City.
- Directed successful bidding process for construction of Thor Urbana’s ~USD\$20M residential expansion in Guadalajara; construction begins September 2021; led bidding process for construction of Thor Urbana’s Ritz-Carlton Reserve resort.

**THOR URBANA***Private equity real estate firm with more than USD\$2.0 B in assets under management*

Mexico City, Mexico

2017-2019

**Investment Analyst**

- Led underwriting, negotiations with landowner and hotel operator and approvals processes for a USD\$150 M, 110-key, 45-unit Ritz-Carlton Reserve luxury resort in Costa Canuva, Riviera Nayarit.
- Completed delinquency and health ratio analyses to determine final price for acquisition of the 500,000 sqft Marina Puerto Cancun lifestyle center from a Canadian Pension Fund; managed repositioning and transitioning of operations.
- Achieved turnover and sale of Thor’s first 50,000 sqft retail center.
- Started and led the MBA summer internship and undergraduate intern’s programs.

**PARTHENON – EY***International management and strategy consulting firm*

Mexico City, Mexico

2016-2017

**Associate Consultant**

- Performed a buy-side commercial due diligence of K-12 private school providers in Peru and Panama; analyzed, processed and modeled population, enrollment and capacity data to evaluate client positions, and understand intensity of competition.
- Conducted a route-to-market analysis on a Consumer Goods company in Honduras and El Salvador and restructured entire logistics operation, triggering an efficiency increase in routes and an overall decrease of ~20% in distribution costs.
- Created recruiting process for Parthenon-EY Mexico & Latam and served as “Head of the Culture Committee”, in charge of affiliation and management of internal and external affairs related to recruitment of consultants.

**DILA CAPITAL***Venture Capital firm with more than MXN\$1,000 M in assets under management*

Mexico City, Mexico

2015-2016

**Intern & Investment Analyst**

- Identified disruptive-model investment opportunities through rigorous analysis, resulting in approval of 11/12 targets (approx. MXN\$130 M); received a special performance bonus (reinvested in fund, becoming an LP); remain an active member of the Investment Committee, taking part in investment approval and portfolio company decisions since.
- Established KPI’s to identify areas of improvement in portfolio, resulting in +30% user increase in “Econduce” and ~20% CAC decreases.

**ADDITIONAL INFORMATION***Certifications*: Training the Street, financial modeling*Volunteer Work*: Fundacion Unidos por Huasca, Volunteer and Assistant to the President*Competitive Sports*: Equestrian Showjumping, training and developing young horses to highest level of competition*Languages*: Spanish, native language; French, speaking*Interests*: Real Estate investment and development, Investment Management, Proptech, Horseback Riding, Alpine Skiing, Hiking

**EDUCATION**

**COLUMBIA BUSINESS SCHOOL**, MBA, Real Estate and Finance 2020-2022

*Leadership:* President of Columbia Build Lab Startup Accelerator, AVP of Real Estate Association

**HARVARD GRADUATE SCHOOL OF DESIGN**, MDesS, Real Estate (Technology and Urban Planning) 2019-2020

*Leadership:* Co-Chair of Harvard Real Estate Venture Competition (largest 'prop-tech' university competition), Editor in Chief of the Harvard Real Estate Review

**UNIVERSITY OF CAMBRIDGE**, BA (Hons), Land Economy 2014-2017

*Major:* Law, Economics and Environment

*Leadership:* President of the Cambridge VC and PE Society, President of Afrinspire (fund raising charity for indigenous development initiatives), Elected Student Representative for the Department

*Honors:* First Class, Gordon Cameron Memorial Prize (best university wide performance in Economics), Santander Homerton Academic Scholarship (top 2 ½ % of students), Principal's List (for high academic achievement)

**EXPERIENCE**

**TMG Partners** San Francisco, CA

*TMG Partners is the Bay Area's largest developer having developed more than \$30 bn worth of real estate.* 2021

**MBA Associate Intern**

- Sole associate intern: currently responsible for detailed market analysis and M&A reports for entry into new geographies such as Salt Lake City, Denver and Boise.

**HP INVESTORS** San Francisco, CA

*HP Investors is an opportunistic real estate private equity firm with more than \$600 m AUM across California.*

**Summer MBA Associate** 2021

- Constructed a dynamic, advanced excel model to evaluate historical firmwide returns and AUM across the portfolio.
- Developed an investment thesis on a value-add medical office platform in the Bay Area; wrote a white paper which was circulated to LP's such as Bain Capital and Goldman Sachs; sourced and underwrote >\$40 mn worth of deals in this sector.
- Updated proformas and asset management models in Argus and Excel for firm's office assets in the Oakland market.

**DB GROUP** Mumbai, India

*DB Group is one of Mumbai's largest developers and has developed more than 20 mn. sq. ft of projects across India.*

**Chief of Staff to Managing Director** 2017-2020

**Leadership**

- Directly supervised 75+ people across finance, legal, design, municipal approvals and construction departments
- Managed high stakes municipal, bureaucratic, complex political approvals for 2 high value projects (US\$ 750 mn in value)
- Coordinated multiple agencies in project execution, contractors, suppliers, architects and consultants, as assistant to project manager for a US\$ 200 m condo project; conducted contractor bidding, managed staff on site, prepared progress reports.
- Implemented affirmative action hiring scheme for all new hires at site level: increased proportion of minority employees from 5% to 20% over 3 years

**Finance & Legal**

- Lead financial analyst responsible for constructing advanced financial models to assess and underwrite all JV and development opportunities (value assessed exceeds US\$ 3.5 bn across multifamily, office and hotel)
- Co-led finance team to achieve financial closure of more than US\$300 m in structured debt and equity for projects; Led JV discussions with Sumitomo Realty (Japan), IKEA, Prestige Constructions, PIK Group (Russia)
- Underwrote development deal for India's largest hotel project (963 keys) with a complex ground lease financing structure.
- Led high-value litigation and wrote a legal brief for a 320-acre land parcel (US\$300 mn value) across the domains of forest law, land acquisition law and promissory estoppel; brief submitted by legal team to Supreme Court of India in case matter

**Technology**

- Set up corporate VC fund (US\$ 3.5 m) to make seed investments in prop-tech companies that offer synergies in business and made 8 seed stage investment across construction-tech, building SaaS and co-living platforms.

**ADDITIONAL INFORMATION**

*Volunteer work:* Founder and President of Writestep India, non-profit focused on addressing minority youth unemployment; *Other Awards:* Thought Leaders Award for Change Agent and Transformation for Writestep

*Languages:* Hindi, Urdu, Gujarati, Marathi, Arabic (basic), Spanish (ab initio)

*Skills:* Advanced Financial Modelling (Excel), ARGUS financial modelling (intermediate)

*Interests:* Rowing, political economy, real estate technology, cities and urban design, magical realism books

*Work Authorization:* STEM OPT (No Sponsorship required), Permanent Work Authorization expected Dec 2022.



## EDUCATION

### **COLUMBIA BUSINESS SCHOOL**

**MBA**, Executive Program, April 2022

New York, NY

2020-2022

*Elected:* Co-President, Hospitality and Travel Association; VP, Education, Real Estate Association

*Member:* Private Equity Club; Columbia Entrepreneurs Organization; Green Business Association

*Course Assistant:* Real Estate Finance B7331; Residential Real Estate B8463

### **VANDERBILT UNIVERSITY**

**BA**, English, May 2012

Nashville, TN

2009-2012

*Minors:* Financial Economics; Corporate Strategy

## EXPERIENCE

### **G. Holdings LLC**

New York, NY

**Executive Vice President, Development and Asset Management** (2020-Present)

2017-Present

- Responsible for growth of the company's real estate portfolio in Europe and U.S.; focused on acquiring and developing hotels and residential assets in select European countries and key U.S. markets
- Acquisitions: €27.5M office portfolio in Netherlands; \$3.6M hotel development site in Florida; Developments: €20M Residence Inn in Belgium; €4.5M of hotel repositioning efforts in Belgium; €15M student housing in Belgium; €28M office-to-condo conversion in Belgium; \$75M hotel in Ft. Lauderdale; \$125M hotel in Aventura
- Acquisition responsibilities include sourcing leads for new properties, underwriting the targeted asset, creating a viable business plan, making a recommendation to senior management, and facilitating a final transaction
- Development responsibilities include liaising with franchisors like Marriott International and Intercontinental Hotels Group, and oversight of entitlements, design, financing, construction, and opening
- U.S. portfolio management focus is on increasing asset values with new leases, cost control, and CapEx initiatives

### **DDG Partners LLC**

New York, NY

**Development Manager**

2016-2017

- Managed \$270M of luxury condominium developments from acquisition through sales
- Managed investor relations for each project; produced and presented all reports at monthly investor meetings
- Responsible for all project Pro Formas for internal and external use
- Sourced and closed \$80M in construction financing for 532 West 20<sup>th</sup> Street and 3550 South Ocean Boulevard
- Led weekly design and construction meetings and supervised design development and construction management efforts

### **Victor Group**

New York, NY

**Associate, Real Estate Development**

2014-2016

- Managed \$560M of luxury condominium developments from acquisition through sales
- Created and maintained project budgets and valuation models for company's development projects
- Produced quarterly project updates and financial reports for investors
- Administered due diligence and closing of \$95M construction loan for 239 10<sup>th</sup> Avenue
- Led weekly design and construction meetings and supervised design development and construction management efforts

### **G. Holdings LLC**

New York, NY

**Analyst**

2012-2014

- Underwrote and supervised \$120M hotel development in Queens, NY and secured \$80M construction loan
- Constructed valuation models for potential acquisition and development opportunities for ownership
- Budgeted and supervised over \$3M of CapEx initiatives at company's portfolio properties
- Analyzed financial operations of company's hotel assets and made recommendations to ownership

## ADDITIONAL INFORMATION

*Awards:* G. Holdings Employee of the Year (2019); G. Holdings Rookie of the Year (2013)

*Skills:* Financial Modeling; Networking; Project Management; Design; Proficient in Microsoft Excel and PowerPoint

*Volunteer Work:* Bottom Line NY Associate Board Member and Chair of Governance Committee

# ANGIE CHO

160 W 22<sup>ND</sup> STREET APT 1202, NEW YORK, NEW YORK 10011

ANGIECHO14@GMAIL.COM ♦ M (914) 433-9007

## RELEVANT EXPERIENCE

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**Acadia Realty Investment Trust, Development Associate (October 2018-December 2020)** New York, NY

- Managed financial performance of 30+ commercial assets ranging from street level urban retail in Manhattan/San Francisco to suburban shopping centers in CA, MI, NC, ME, UT – high-yield fund, core assets, JVs
- Project managed re-tenanting and development project on assets with the construction team for new pad sites, expansions, tenant fit-outs, and re-zoning for sites ranging from 4,000 to 600,000 SF – on average targeting and delivering incremental returns of ~15% when cash-flowing
- Responsible for creating, maintaining, presenting Excel and Argus asset models, projections, & asset yields to internal investment committee and fund investors
- Assessed and approved capital improvements, revised operating budgets, working with property management, leasing brokers, and institutional lenders to optimize performance and investor returns
- Led all troubleshooting efforts for assets including condo correspondence, sponsor condo unit sales, BSA variances and approvals, FDNY & DOB violations and approvals
- Assisted in due diligence for development opportunities within new acquisition considerations
- Maintained investor reporting for Acadia Strategic Opportunity Fund III-V

**45 South Main Street Corp., Associate (October 2016-October 2018)** Westchester, NY

- Led underwriting, negotiated financing when necessary, conducted due diligence, and oversaw construction on 5 value-add mixed-use or residential acquisitions throughout Westchester and northern New Jersey
- Responsible for creating and maintaining financial and strategic analyses including cash flow models, liquidity summaries & hold/sell and lease analyses
- Oversaw asset management activities of 11 properties, managed quarterly operating reports & coordinated with city officials, architectural firms, legal counsel, and brokers for leases, permits, operating agreements, loan documents
- Perform market research and sourced new real estate opportunities with brokers, property owners & city management in targeted markets

**Wachtell, Lipton, Rosen & Katz, Corporate Paralegal (April 2015-September 2016)** New York, NY

- Collaborated with attorneys to sign and close 37+ M&A, Real Estate, and Restructuring and Finance deals, including preparing and filing all SEC/regulatory reporting, updating investor communications and reporting, drafting agreements, and researching legal and market trends

**Nomura Securities, Securitized Products Global Markets Analyst (June 2014-March 2015)** New York, NY

- Asset Finance Desk: Financed term loans and revolvers with a capital markets securitization take-out for fundings ranging from \$50-300MM, working closely with Whole Loan Trading Desk
- Coordinated due diligence, presented to Head Committee, drafted investment summaries for internal and external pitches, coordinated with custodians and calculation agents, responsible for monthly remittances, loan pool fundings
- Originated and maintained stress test sensitivity models, collateral summaries, and waterfall financial cash flow models on Excel and CAS for fundings, new facilities, and securitizations

## EDUCATION

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**Dartmouth College (2010-2014)** Hanover, NH

- *Bachelor of Arts in Government (Concentration in International Politics and Economics)*
- Activities: Alpha Phi Sorority (*VP Chapter Operations*), The Dartmouth (*Senior News Editor*), Women in Business, Barcelona Language Study Abroad Program, Club Tennis, Upper Valley Investment

## SKILLS & INTERESTS

- 
- Proficient in: Microsoft Word/Excel/Powerpoint, Bloomberg Terminal, Argus DCF/AE, Collateral Analysis System, Stata, LexisNexis, ThompsonOne, EDGARProfiler, VBA
  - Languages: Fluent in English and Korean
  - Interests: Squash, Hiking, Reading, Travel, Tennis, Board Games

## **KOUROSH FATHI**

40 Clarkson Ave, Apt 5G, Brooklyn, NY, 11226

### **EDUCATION**

Columbia University Master's of Real Estate Development MSRED	2022
University of Toronto Master's of Architecture MARCH	2014
University of Toronto Bachelor's of Materials Science BASC	2011

### **PROFESSIONAL EXPERIENCE**

Diamond Schmitt Architects, Intern Architect	Nov2018-May2021
Fanshawe College Innovation Centre City of London	
Confederation Line LRT Extension City of Ottawa	
Alexandra Park Toronto Community Housing	
GH3 Architects, Intern Architect	Jan2016-Aug2018
Ferrier Garage, Edmonton	
Lillian Park Rental Apartments	
Borden Park Natural Swimming Pool Edmonton	
Small Monumental, Director	June2013-Present
Urban Community Hub, City of Brampton	

### **ENGAGEMENT**

City of Brampton Community Hub, Guest Lecture	2020
University of Toronto MARCH, Guest Critic	2015-2020
University of Fine Arts Tehran, Guest Lecture	2013

### **EXHIBITIONS**

Bathroom Patterns	2014
Photographs and drawings	
Platform 28, Tehran	
Curated by Azadeh Zaferani (Bartlett)	
Woven Compressive Columns	2013
Sculpture	
University of Fine Arts Tehran (Atrium)	
Curated by Jorge Ayala (AA School of Architecture)	

### **PUBLICATIONS**

Building Resilience	2014
<a href="http://spacing.ca">http://spacing.ca</a>	

# HUICHUN GAO



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116 TERRAPIN  
IRVINE, CA 92618, USA

+1 858-900-5405

## ACADEMIC BACKGROUND

### Columbia University, USA

Master Degree | May. 2022

- Master of Science in Real Estate Development
- Real Estate Finance and investment
- Real Estate development and project management
- Market Analysis

### Design Institute of San Diego, USA

Bachelor Degree | Jan. 2016 - May. 2018

- Diploma in Interior Design
- Went through in-depth training on space planning, schematic design, construction and project management, construction documents, and business administration

## AWARDS

### International Interior Design Association Social Student Design Charrette Competition

#### 1st Place Winner

- Collaborated with 4 other team members to create a schematic design of a heritage architectural space.
- Communicated with "the client" and specified the needs of the project.
- -Managed the timeline of each phase of the project and allocated the work to specific team members.

### International Interior Design Association NeoCon U.S. Student Design Charrette Competition

#### 2nd Place Winner

- Worked with a team of 5 and played the role of leadership to keep the project on track.
- Presented the designed project to the juries with comprehensive perspectives.

## PROFESSIONAL HISTORY

### Chef Designer & Principal

Eva Gao Interiors | June 2018 - present

- Overall Planning: Undertook the overall planning and implementation of design projects, such as floor planning, scheme designing, construction drawing production and reviewing, etc.
- Schematic Design: Conducted brain-storming on design schemes and organized preliminary investigation and exchange work, and 8 mature schemes have been formulated currently.
- Overall Management: Planned, directed, and coordinated various aspects of the operating area to ensure that operations of the interior run smoothly in accordance with relevant standards.
- Industry Forecasting: Established design objectives by forecasting annual planning quotas and industry trends and projecting expected plan volumes for existing and new designs.
- Clientele Maintaining: maintained strong and long-lasting cooperation relations with clients.
- Personnel Management: Screened, interviewed, hired, and trained other design crew, as well as providing professional technical guidance and instructions for designers.

## CERTIFICATES

### LEED Green Associate

- a professional's thorough comprehension of green building principles and practices.

### IIDA Associate Member

- The International Interior Design Association (IIDA) is the Commercial Interior Design Association with a global reach.

# Javaughn Griffin

830 Division Ave NE ▪ Washington, DC 20019 ▪ 202-507-1809 ▪ griffinjavaughn@gmail.com

## EDUCATION

### Columbia University

*MBA*

- Columbia Fellow (75% Tuition)

*GMAT: 700 (88th Percentile)*

New York, NY

Aug 2021 - Aug 2023

### Northeastern University

*Bachelor of Science, Information Science and Business Finance*

- *President*, Sigma Chapter of Alpha Phi Alpha Fraternity, Inc. (2011-2013)
- *President*, Northeastern University National PanHellenic Council (2013-2015)
- Study Abroad: Havana, Cuba (May 2014) | Madrid, Spain (May 2012)

Boston, MA

May 2015

## PROFESSIONAL EXPERIENCE

### Deloitte Consulting, LLP

*Senior Technical Consultant - User Management Lead*

- Decreased audit issues to near 0% by developing a web accessible repository for client documentation and creating a verification process for all uploaded documents
- Reduced ticket resolution time by 50% and increased user access by 70% through creation of an in-depth tracking system for end-user system access and responsible parties, triggering automatic email notifications for action items

Arlington, VA

September 2019 – Present

### IBM

*Senior Consultant - SAP Governance, Risk & Compliance (GRC) Architect*

- Led a team of seven through the implementation of a fully functional online web application to track and report issues, upgrading the client's security team legacy issue tracker. Completion time: one month (original estimate: six months)
- Centralized the onboarding process for over 450 end-users across 11 different functional areas by pioneering the installation of a remote central management system for 26 development systems
- Reduced time and resources required for systems to be operational by 50% through creating SQL scripts for validations

Washington, DC

December 2018 – August 2019

*Senior Consultant – SAP BASIS & Job Scheduling Lead*

- Spearheaded client's successful transition of financial systems through implementation of connectivity solutions for multiple 3<sup>rd</sup> party interfaces, ranging from port connectivity to client file transfer protocol (FTP) setup
- Increased task efficiency by 40% by collaborating with functional teams to swiftly test end-to-end processes through system automated batch jobs, dissolving the client's outdated process of manually executing each task

May 2017 – November 2018

*Enterprise Applications Consultant – SAP BASIS & Content Management Lead*

- Guided first ever IBM IXOS content management team to successful installation and configuration of archive server to properly store and quickly retrieve 1terabyte of data from over 20 years of stored data
- Led all communication efforts during two successful dry runs and Go-Live to ensure an audit-ready system was delivered before the deadline, fostering and maintaining relationships and trust with 300+ client end-users

October 2015 – April 2017

### Real Estate Development

*Entrepreneur*

- Purchased, designed, and renovated three distressed residential properties totaling 6,000 square feet in Washington, D.C. which serve as affordable housing for low- to mid-income families
- Managed subcontractors, budgeting, and scheduling for a \$340K renovation project in the midst of a pandemic
- Analyzed value-add investments, modeled cash flows, and performed market analysis for Washington, D.C. deals

Washington, DC

August 2018 – Present

## LEADERSHIP ACTIVITIES & INTERESTS

- **Professional Development:** Management Leadership for Tomorrow (MLT)
- **Alumni Leadership:** Deloitte's Black Employee Network, Recruiter
- **Community Service:** College Bound Mentor, February 2019-Present
- **Interests:** Real Estate development, Spartan Races, half-marathons, traveling (40+ countries), competitive flag football

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, Finance and Management, May 2022

New York, NY

2020–2022

*Honors and Awards:* Toigo Fellow and CBS Captain; Above and Beyond Award (selected among 117 nominations)

*Leadership:* Chair, Career Management Center Fellows; VP of Liaison, Private Equity Club; VP of Treks, Venture Capital Club

*Member:* Investment Banking Club, Technology and Data Analytics Association, Hermes Society (Ambassador), Wine Society

### THE UNIVERSITY OF TEXAS AT AUSTIN

**BS**, Mechanical Engineering, May 2013

Austin, TX

2009–2013

*Minor and Certificate:* Chemistry; Management Science and Engineering (Graduate-level)

*Honors:* SPIRIT Scholar (selected Engineering and Business Honors students); Department and Women in Engineering Scholarships

*Leadership:* President, Society of Women Engineers

## EXPERIENCE

### J.P. MORGAN CHASE & CO.

**Summer Associate, Technology Investment Banking**

New York, NY

Summer 2021

- Created investor and research analyst presentations ahead of IPO roadshow for a SaaS and fintech company, collaborating with client C-suite executives and senior bankers to refine key points; received early positive investor feedback
- Assisted with a secondary listing pitch for a global technology services company over six days; JPM selected as lead bookrunner
- Prepared a buy-side M&A proposal for a high-growth public software company, entailing public market overviews, strategic rationale, and valuation models including discounted cash flow (DCF) analysis, publicly traded peers, and precedent transactions

### AVETTA

*Cloud-based provider of supply chain risk management software and commercial marketplace to enterprises*

New York, NY

Spring 2021

**MBA Strategy Intern**

- Developed plan to drive go-to-market strategy by creating a survey for 100,000 supplier clients and conducting research on B2B marketplaces and client interviews across the U.S., Canada, UK, and Australia
- Analyzed insurance data of 450 operators and 95,000 suppliers by firmographics and presented insights to C-suite executives, leading to best practices content and industry benchmarks for enterprise clients

### EXXON MOBIL CORPORATION

**Venture Business Lead, Major Growth Ventures (2020–2020)**

Houston, TX; Arctic Coast of Alaska

2013–2020

- Established cost structure of a \$7B chemical growth venture, second wholly foreign-owned complex in China
- Managed interfaces between key stakeholders across five subsidiaries in the U.S. and Asia, identifying synergy after reorganization

**Business Venture Manager, Digital Transformation (2018–2020)**

- Led cross-functional team of 10 to implement end-to-end solution from Procore, a vertical SaaS unicorn, to digitize construction sites across North America, Europe, and Asia for over 1500 users, capturing \$53M in improved productivity
- Spearheaded negotiations with Procore senior executives and attorneys to streamline pricing model, reducing fee by 30%
- Presented on panels and at technology conference with 4,000 attendees; served on Procore's Executive Customer Advisory Board

**Business Analyst, Capital Projects Business Model Redesign (2017–2018)**

- Collaborated with management consultants to overhaul capital projects business model across value chain, driving \$6B earnings growth and reducing 20% cost, 15% schedule, and 15% labor

**Project Management Engineer (2013–2017)**

- Built investment estimate of \$8B petrochemical project jointly owned by ExxonMobil and SABIC; full funding secured
- Oversaw cost and schedule of a \$4.4B remote onshore Arctic natural gas development project, achieving production commitments to the State of Alaska within budget and on time
- Generated early-stage cost estimates of upstream capital projects ranging \$2B to \$60B

## ADDITIONAL INFORMATION

*Community:* Columbia Empowering Asian Women–Mentor; Society of Women Engineers–Vice Chair, Corporate Advisory Board

*Interests:* Automotive (manual transmission, electric vehicles); ping pong; horology; museums; international cuisines

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, May 2022

New York, NY  
2020-2022

*Leadership:* Co-President, Real Estate Association; Hermes Society & Cluster Social Representative

*Member:* Urban Land Institute, General Management Association, Columbia Women in Business, Wine Society, Golf Club & Volleyball Club

### VANDERBILT UNIVERSITY

**BA**, Political Science, May 2016

Nashville, TN  
2014-2016

*Minor:* Psychology

*Honors:* Hilltop Scholar, Provost Scholar & Pre-Law Scholar

*Member:* Division I Athlete, Undergraduate Political Science Association & Delta Delta Delta Sorority

*Internships:* Editorial Intern, Hearst; Events Intern, Hearst; & Assistant Stylist for Miranda Lambert

## EXPERIENCE

### WELLTOWER

**Investments & Capital Markets Intern**

New York, NY  
Present

### HARROD PROPERTIES

*Founded by former partner at Trammell Crow – 15+ million square feet in development*

Tampa, FL  
2020

**Pre-MBA Intern**

- Launched healthcare acquisition fund with \$4M medical office building with an IRR of 16.7% in San Antonio, TX
  - Negotiated price and terms with broker to achieve stabilized cash on cash return of 9.13%; liaison for contract discussions with broker and attorneys
  - Evaluated tenant leases and assessed CapEx and TI required to convert remaining vacant office space to medical office
- Assisted in business development for presentation to city of Clearwater to develop 700K+ SF of light industrial on city owned golf course
  - Developed marketing materials and conducted community outreach

### STRATEGIC PROPERTY PARTNERS

*Joint venture: Bill Gates and Jeff Vinick – \$3B+ redevelopment in Tampa Bay*

Tampa, FL  
2020

**Pre-MBA Intern**

- Collaborated on master plan of 9+ million square feet of commercial, residential, hospitality, cultural, entertainment, education, and retail
- Prepared presentations for advisory board on affordable housing initiatives
- Reviewed underwriting of phase 3 of project “Water Street Tampa”, focusing on residential market research

### MORGAN STANLEY

*The Vinder Group – #24 team in the country with assets under management of \$7.75B*

New York, NY  
2017-2020

**Private Wealth Management Associate**

- Led training of new team members by developing training material for onboarding to ensure consistency in client service and implementation of firm policies and FINRA regulations
- Oversaw training of employees and contracted resource for firm employees to improve efficiency and effectiveness
- Pitched new initiatives to Global Head of Private Wealth Management, as sole representative of development teams; resulted in significant firm costs savings, improvement of payment services, and acquisition of a \$125M+ relationship

## ADDITIONAL INFORMATION

*Certifications:* Series 7, Series 66, and Securities Industry Essentials (SIE)

*Volunteer Work:* Ovarian Cancer Research Fund Alliance

*Interests:* Volleyball, Equestrian, and Cooking

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate, May 2022

New York, NY

2020-Present

*Honors:* Real Estate Circle Fellowship (awarded to three 2<sup>nd</sup> year students who have demonstrated extraordinary leadership capability, academic excellence, and strong potential to be a future leader in the industry); Real Estate Portfolio Management Course Assistant (selected by faculty members to assist with course that focuses on implementation of private real estate strategies)

*Leadership:* Co-President, AVP of Events – Family Business Club; VP of Alumni & Mentorship, AVP of Alumni & Mentorship – Real Estate Association; Student Ambassador – Hermes Society; AVP of Finance – Hospitality and Travel Association

**UNIVERSITY OF SOUTHERN CALIFORNIA**

Los Angeles, CA

**BS**, Business Administration; **Minor**, Real Estate Development, December 2014

2011-2014

*Honors:* Magna cum laude (>3.7 GPA); Marshall School of Business Dean's List (>3.5 GPA); Darren Dahlman Memorial Endowed Scholar (merit-based scholarship); Jeffrey N. Ansbacher Memorial Endowed Scholar (merit-based scholarship)

*Leadership:* Senior Advisor, Vice President of Student Affairs, Treasurer, Director of Funding – Marshall Business Student Government; Investment Banking Mentor – Trojan Investing Society; Historian, Marketing Chair, Philanthropy Committee – Alpha Kappa Psi Professional Business Fraternity; Mini-Course Teacher – Joint Education Project

*Internships:* Finance and Accounting Undergraduate Associate (2013) – Disney ABC Television Group; Financial Analyst Intern (2013), Business Development Intern (2012) – Singpoli Capital Corporation; Wealth Management Intern (2012) – Merrill Lynch

**EXPERIENCE****INVESCO***Investment management firm (\$82.8bn real estate AUM) that invests in direct properties*

New York, NY

**MBA Real Estate Acquisitions & Debt Intern** (2021)

Summer 2021-Present

- Underwrite \$1.9bn worth of real estate equity and debt transactions across core / core-plus, value-add, and opportunistic strategies as well as various sectors, including multifamily, office, self-storage, life science, and industrial
- Develop underwriting models, co-author investment committee materials, present deals to directors, and lead market landscape update discussions with brokers and business plan evaluations with asset managers
- Select transaction experience (16 underwritten deals):
  - \$124mm refinancing transaction for a 6-asset portfolio located in West Palm Beach, FL; Central PA; and Somerset, NJ totaling 1.2mm sqft
  - \$91mm acquisition of a 252-unit core multifamily asset in Englewood, NJ

**DIVCOWEST***Vertically-integrated owner operator (\$8.1bn AUM) focused on office and lab assets in bi-coastal markets*

San Francisco, CA

**Capital Strategies & Formation: Associate Director** (2020), **Associate** (2018-2019)

2018-2020

- Spearheaded creation, production, and maintenance of marketing materials such as pitchbooks, due diligence questionnaires, and investment memorandums for fundraises worth ~\$2bn for a value-add fund and \$750mm for 3 core / core-plus separate accounts
- Analyzed and incorporated real estate metrics to ensure timely responses for an upwards of ~70 limited partners
- Presented weekly updates on existing investor base and prospective relationships to the senior management team
- Led yearly summer internship program by organizing educational sessions and mentoring 4-6 summer analysts on best practices

**J.P. MORGAN**

San Francisco, CA

*Technology Equity Capital Markets group – raised capital through IPO and follow-on offerings*

2014-2017

**TMT ECM Investment Banking: Analyst** (2015-2017), **Summer Analyst** (2014)

- Executed IPO and follow-on offerings for 100+ clients in the software, internet, and semi-conductor sectors by envisioning and creating bake-off pitches as well as execution strategies as the lead Analyst without Associate to Vice President-level involvement
- Select transaction experience (16 completed deals):
  - Twilio's \$173mm IPO and \$322mm follow-on offering – completed detailed analyses for topics such as dual-class structure, exchange considerations, and shareholder evolution trends; tracked valuation changes; updated IPO valuation matrix
  - Snap's \$3.9bn IPO – conducted thorough investor targeting; evaluated pricing and performance of precedent \$1bn+ IPOs; assessed no-vote / low-vote structure and staggered lock-ups for the company's IPO
- Ranked at top of Investment Banking Analyst class and received Class of 2018 Investment Banking Associate promotion

**ADDITIONAL INFORMATION***Certifications and Skills:* Series 79; Series 63; Argus Enterprise Training Certification Program (in progress)

*Volunteer Work:* USC Alumni Board of San Francisco (planned fundraisers, community service events, and socials for USC Alumni); Exploratorium Museum (volunteered at interactive science, technology, and arts museum based in San Francisco and hosted events for ~200 members); piano (raised \$3k to fund 4 Chinese orphans' cleft lip operations by selling CDs)

*Interests:* Art; charcuterie boards; event planning; oil painting; TaeKwonDo (black belt); traveling; yoga



## EDUCATION

**COLUMBIA BUSINESS SCHOOL**  
MBA, Real Estate, May 2023

New York, NY  
2021-2023

**FRANKLIN & MARSHALL COLLEGE**

BA, Mathematics and Business, May 2015

Overall GPA: 3.94/4.00

Lancaster, PA  
2011-2015

*Honors: Summa Cum Laude, Phi Beta Kappa*

*Hackman Scholar (May 2013 – July 2013): Co-authored 2 papers on dystopian dark tourism and consumer culture*

## EXPERIENCE

**CA Ventures** vertically integrated alternative real estate investment management company in Student Housing, Senior Housing, Multifamily, and Logistics with total assets under management of \$13bn

Chicago, IL  
2017-2021

### Senior Associate, Investments

- Managed and executed Student Housing, Senior Housing, Multifamily, and Logistics development, acquisition, and disposition transactions with institutional capital partners in U.S. and Europe. Select transactions include:

#### U.S.:

- ~\$300mm M&A transaction with QuadReal (real estate arm of British Columbia Investment Management Corp.) acquiring 50% of student housing platform (*closed*):
  - Quarterbacked various teams to complete due diligence requests from QuadReal's auditors, lawyers, and consultants, closing transaction by promptly providing consistent data and thorough responses
  - Constructed dynamic financial models and comprehensive investment presentations on platform valuation consisting of 100+ employees, 42 projects, and 18k+ beds, winning approval from QuadReal
- \$103mm Multifamily development project totaling 285 units in West Sacramento, CA (*closed*):
  - Led agreement negotiation and closing process with both Parse Capital and Cottonwood Residential as preferred equity investors, capitalizing project producing ~\$2.4mm in revenue
- \$318mm Senior Housing acquisition portfolio totaling 1,000+ units with Goldman Sachs in 7 cities (*closed*):
  - Built and managed models that perform scenario testing on return projections to facilitate pricing negotiation with seller, resulting in firm's largest acquisition of 12-asset Senior Housing portfolio
- ~\$40mm Logistics development projects totaling 530k SF in Midwest market (*closed*):
  - Created and streamlined analytical workflows and processes to facilitate formation of new Logistics real estate platform, leading to closing of first 3 projects generating ~\$1.4mm in revenue

#### Europe:

- £123mm Student Housing developments with PGIM in 3 major university markets of U.K. (*closed*):
  - Reviewed and negotiated legal documents, managed due diligence process with capital partners, and maintained financial models to close transaction of firm's first 3 U.K. Student Housing developments in Sheffield, Glasgow, and Edinburgh, generating £5mm in revenue for new Europe platform
- €24mm Mezzanine/Senior financing for Student Housing project in Krakow, Poland (*closed*):
  - Developed financial model and investment memo for Mezzanine investors and Senior Loan lender, ensuring timely financing raised for project to meet timeline prior to school start
- Standardized project-level and fund-level financial model templates for all firm's platforms, enhancing efficiencies in underwriting and making pass/no pass decisions on potential investments
- Served as mentor for career development, analytical training, and work delegation of multiple junior team members

**Rapid Ratings International** Credit ratings FinTech firm providing financial health analysis  
Senior Financial Analyst

New York, NY  
2015-2017

- Analyzed financial statements and communicated with clients to build Financial Health Reports evaluating default risk of companies, helping clients make operational decisions on continuing cooperation with their counterparties
- Created new financial models to identify potential errors and improve automation in rating generating process, decreasing analysts' turnaround time by 25% through reduction in reviewing time and manual data inputs
- Managed training and work allocation of 6 newly hired analysts, assuring quality and timely completion of tasks

## ADDITIONAL INFORMATION

*Skills: Excel, PowerPoint, Word, CRM, Bloomberg*

*Certifications: Chartered Financial Analyst (August 2019)*

*Awards: China National Chess Tournament – Gold Medal*

*Languages: Chinese and English*

*Interests: Chess, Reading, Basketball, Pool, Poker, Travel*

# Joseph Ju

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## EDUCATION

### Columbia University

*M.S. Real Estate Development*

New York, NY

June 2021 - Expected May 2022

**Awards:** M.S. Real Estate Development Program Scholarship

### New York University

*B.S. Real Estate, magna cum laude (GPA: 3.8)*

New York, NY

January 2019 - January 2021

**Awards:** Founders' Day Award, Dean's Honor List, Dean's Undergraduate Scholar, Future Alumni Scholar

**Relevant Coursework:** Real Estate Valuation, Real Estate Capital Markets, Real Estate Financial Modeling, Data Analytics, Hotel Investments

### University of California, Riverside

*B.S. Neuroscience*

Riverside, CA

September 2016 - Transferred

**SAT:** 2260 CR: 800 Math: 770 Writing: 690

## EXPERIENCE

### Grand Street Development

New York, New York

#### *Acquisition Analyst*

January 2021 - Present

- Built accurate and dynamic financial models for ground-up construction of multifamily properties and acquisition models for multifamily and mixed-use asset classes in the Tri-state area with a net value of over \$500M.
- Outlined accurate construction schedules and created detailed stacking plans and unit mixes to maximize efficiency at a minimum of 85% efficiency per floor.
- Provided a well-planned budget with accurate operating expenses, hard costs, and soft costs assumptions by researching historical information, bids, and proposals, which increased returns by over 8%.

### Ackman-Ziff

New York, New York

#### *Analyst*

August 2020 - January 2021

- Created offering memorandums for office, mixed-use, multifamily, hotel, and SFR portfolios by performing market research that were later presented to persuade investors to invest in the deals which brought in over \$1.1B in proceeds.
- Researched news articles, term sheets, loan agreements, market studies, schematics, and financial models that were presented to the investment committee to help make sound investment decisions.
- Assessed asset value by determining cap rates and sales comps and brought in over \$250M in potential businesses based on loan maturity date and construction starts by utilizing RCA.

### DISH ONE

Riverside, CA

#### *Sales Representative*

February 2018 - June 2018

- Increased team sales velocity per opportunity by 15% by analyzing the company's products and past interactions with clients while maintain average selling price but increasing close rate.
- Developed new sales strategy through the study and analysis of target neighborhood economic profiles and updated existing firm strategies to fit specific neighborhoods.
- Established new marketing memoranda and delivered weekly research presentation to senior management that increased opportunity win rate by 12%.

## VOLUNTEER SERVICE & INTERESTS

### ULNE World Missionary Foundation

Fremont, CA

#### *Director of International Affairs*

October 2016 - Present

- Raised donations by 20% by updating existing foundation awareness plans and expanding to Taiwan and Japan.
- Assisted in the organization and distribution of over 150,000 gently used children's books to teachers from under-resourced public school in NYC.
- Coordinated with board members to develop and maintain relationships between other organizations for a common purpose.

### Cushman & Wakefield

Virtual

#### *Virtual Exposure Program Participant*

June 2020 - August 2020

- Nominated to participate in weekly virtual seminars that exposed participants to the world of commercial real estate.
- Networked with industry professionals and debated on the future of commercial real estate after the COVID-19 pandemic.
- Partook in leadership and brokerage programs that developed leadership, networking, and relationship-building skills.

### KPMG

Virtual

#### *Virtual Exposure Program Participant*

June 2020 - August 2020

- Assessed big data and identified accuracy, completeness, and duplicate value issues within the data and came up with strategies to mitigate these issues.
- Analyzed big data to build a recommendation for the client's marketing strategy through data exploration and interpretation.
- Developed models and created presentations that allowed the client to see our methodologies and process moving forward.

## ADDITIONAL

**Fluent in:** English, Chinese

**Technical Skills:** Argus Valuation, Financial Modeling, Data Analytics, Excel, HTML, R Studio, Adobe Photoshop, Adobe Premiere, Adobe Animate

**Training:** Argus Valuation, Real Estate Financial Modeling, Hotel Valuation Software, R Studio, Python

**Hobbies:** Swimming, Water Polo, Basketball, Drumming, MMA

**EDUCATION****COLUMBIA BUSINESS SCHOOL**

MBA, May 2023

New York, NY

2021-2023

**NATIONAL TAIWAN UNIVERSITY**

BBA, International Business, January 2015

Taipei, Taiwan

2010-2015

*Honors: Dean's List**Study Abroad: Copenhagen Business School (2014)***EXPERIENCE****RIANT CAPITAL***Real estate private equity firm focusing on commercial real estate with \$1.3 billion AUM*

Taipei, Taiwan

2017-2021

**Associate** (2020-2021); **Analyst** (2017-2020)

- Acquisitions Associate covering hospitality, office and retail sectors, with extensive exposure in Asset Management; first Analyst promoted to Associate among peer group
- Selected Deal Experience:
  - *Potential acquisition of a \$60 Million 300-key Distressed Hotel in Guam, USA*
    - Built LBO model; proposed 3 capital structures with scenario analyses to reduce equity requirements and increase returns
    - Formed hotel positioning strategy and improved P&L projections by analyzing comparable hotels' pricing strategies, location and room mix; managed site inspection of 9 competitive properties
    - Led due diligence in documents including hotel management agreements, encumbrances and floor plans
  - *\$820 Million Refinancing for a \$1.3 Billion Mixed-Use Development in Taipei, Taiwan*
    - Reviewed loan agreement and built step-by-step cashflow model to highlight capital shortfalls for loan drawdown; the simulation was used by Chief Financial Officer to negotiate more flexible use of funds to achieve higher leverage
    - Coordinated with lead bank and streamlined document preparation to shorten lead time of first drawdown by 50%
  - *Disposition of a \$200 Million Industrial Office & Hotel Complex in Hsinchu, Taiwan*
    - Developed pitchbooks to facilitate sale of the asset, the first transaction above \$120 million by institutional investor in Hsinchu market in 8 years, with unit price 40% above market level
    - Initiated market research including door-to-door site visits of 14 office buildings and cold calls to occupiers to acquire off-market data showing supply shortage of office space and strong sector growth
- Controlled P&L and developed marketing toolkit including presentations and press release for Taiwan's first open-air shipping container market; built 3-statement financial models to explore replication of business model in Singapore and Bangkok

**SERRA ADVISORS****Intern**

Taipei, Taiwan

2016-2017

- Prepared teasers for potential cross-border M&A transactions between companies in China, the US, and Europe
- Designed a scoring system to screen targets with metrics including product, R&D and distribution network; the scoring system was adopted by 6 other interns

**ADMINISTRATIVE ENFORCEMENT AGENCY, MINISTRY OF JUSTICE****Assistant to Administrative Officer** (Mandatory Substitute Military Services)

Taipei, Taiwan

2016-2017

- Selected as distinguished Substitute Services Draftee out of 50 peers

**FAREASTONE TELECOMMUNICATIONS***Top 3 telecom operator with 24% market share in Taiwan*

Taipei, Taiwan

2015-2016

**Business Analyst, Corporate Strategy & Development Office**

- Worked with Chief Strategy Officer to initiate new business development, facilitate annual strategy planning events, and advise on strategic issues; ranked top 5% in annual review
- Proposed a digital-out-of-home advertising business case with annual revenue potential of \$70 million; built a financial model and conducted sensitivity tests using Oracle Crystal Ball to identify critical risks

**ADDITIONAL INFORMATION***Work Authorization: STEM MBA, 3-year OPT eligible**Volunteer Work: Taiwan LGBT+ Hotline, International Geography Olympiad Coach, NTU Italian Course Teaching Assistant**Languages: Mandarin (Native), Italian (Basic)**Interests: Scuba diving (PADI Advanced Open Water Diver), urban traveling, scouting for boutique hotels and B&Bs*

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, Real Estate, May 2022

*Member:* Golf Club, Arts Society, Basketball Club, Real Estate Association, Wine Society

*Case Competition:* Team Captain, UT Austin 2020 National Real Estate Challenge

New York, NY  
2020-2022

### UNIVERSITY OF SOUTHERN CALIFORNIA

**BS**, Business Administration, December 2012

*Honors:* Dean's List (Fall 2011)

*Leadership/Study Abroad/Internship:* Marshall Career Advantage Program, UBS PWM Internship, Pi Kappa Alpha Fraternity

Los Angeles, CA  
2010-2012

## EXPERIENCE

### GREYSTAR REAL ESTATE PARTNERS

**Summer Associate, Investments**

Newport Beach, CA  
2021-2021

- Responsible for underwriting all value-add and core-plus investment activity within Greystar's Bay Area and Pacific Northwest geographies and co-authoring of Investment Committee submittals
- Underwrote seven investment opportunities totaling \$700 million in asset value. Of those seven opportunities, two were transacted on, resulting in an \$80 million equity commitment within Greystar's flagship value-add fund
- Trained and advised two new analyst hires in Greystar's modeling, investment, and operational processes

#### Selected Deal Experience:

- 387-unit value-add multifamily asset in a suburb of the Portland, OR MSA (\$100M) – awarded deal
- 410-unit value-add multifamily asset in Sacramento, CA (\$110M) – lost deal after best & final round

### MACERICH (NYSE:MAC)

**Manager, Asset Management** (2019-2020)

Santa Monica, CA  
2014-2020

- Led Macerich's partnership with Heitman, including strategic planning, merchandising decisions, and capital planning
- Maximized over \$200 million of NOI across eight Class A malls through expense management and creative leasing options
- Managed two analysts who handled budgeting and forecasting needs, reporting, approvals, and compliance
- Provided strategic insights on the \$325 million redevelopment of a Class A shopping center located in the Western US. This ultimately led to redesigning the project's master plan to better integrate the new product types with the existing mall
- Responsible for all development underwriting for eight superregional mall assets; deliverables include Board of Directors approval packages as well as quarterly development meeting updates

#### **Senior Analyst, Asset Management** (2015-2019)

- Managed the recapitalization of Broadway Plaza, a Class A trophy asset that traded in excess of \$800 million. Oversaw all stages of the deal process, from creation of the offering memorandum through closing
- Built and maintained the ARGUS model used to secure over \$400 million in debt financing for Broadway Plaza
- Underwrote several high-impact development opportunities including a Macy's building adaptive re-use project in Boulder, CO
- Promoted to Senior Analyst after fourteen months, 50% faster than average

#### **Analyst, Asset Management** (2014-2015)

- Underwrote 10% of Macerich's portfolio to demonstrate underlying asset value to Macerich's Board of Directors, helping to defeat a hostile takeover attempt from Simon Property Group (NYSE:SPG)
- Presented all new leasing activity within the portfolios of Miller Capital Advisory, Walton Street Capital, and WDP to partnership leadership teams, explaining the strategy behind and economics for each proposed deal
- Drafted property-level projections for Miller Capital Advisory, Walton Street, and WDP on a quarterly basis

## ADDITIONAL INFORMATION

*Skills:* ARGUS Enterprise, DCF, Oracle (Hyperion, CRM, GL), Yardi, Microsoft Office Suite

*Languages:* Proficient in Spanish, basic knowledge of Italian and French

*Interests:* Nutrition, Golfing, watching NBA basketball, racing shifter karts, attending pop-up art exhibitions

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

MBA, Real Estate, May 2022

*Leadership:* Hospitality Club Board, Diversity and Equity Inclusion Chair.

New York, NY

2021-2022

### MIT SCHOOL OF ARCHITECTURE AND DESIGN

Certificate in Commercial Real Estate Analysis and Finance

Boston, MA

2019

### EDINBURGH UNIVERSITY

MA, Architectural History and Art, *Master of Arts with Honours*

Edinburgh, UK

2008-2012

## EXPERIENCE

### CRAIG PROPERTIES LTD

*British-based family office real estate focused investment firm.*

New York, NY

2018-2021

#### Principal

- Led the setup of and managed the US office of a UK-based real estate company
- Sourced, evaluated and presented new investment opportunities to the board, now a cornerstone of the US portfolio
- Hired property managers, contractors, and service providers across the portfolio
- Pivoted quickly during the COVID pandemic to readjust our leasing strategy ensuring full occupancy
- Created and implemented a new strategy to diversify asset classes and spread risk away from a single geographic cluster after having identified this as a weakness in the portfolio

### CROWDCUBE

*The first and largest equity crowdfunding platform*

London, UK

2014-2017

#### Senior Equity, Commercial Team

- Joined the company as an early employee saw it through 4 fundraises, to over 200 employees as a key commercial team member
- Carved a reputational niche for large £million+ campaigns (e.g. sourced and closed fintech start up, Monzo Bank, which raised an initial £1M from 8,500 investors in 96 seconds – a world record for the industry)
- Generated ~£50M in revenue for the platform – the top performer firm-wide

### BALDERTON CAPITAL

#### Summer Associate

London, UK

2016

- Selected from peers as a high-potential employee for a secondment (from Crowdcube) to our VC investor to further my professional development alongside top-tier MBA students in the coveted Summer Associate Program

## ADDITIONAL INFORMATION

- **COMPASS:** Obtained my NYC real estate salesperson license and was invited to hang my license with Compass LLC – the world's fastest growing brokerage
- **WORLD CUP POP UP NYC:** Ideated and negotiated the rental of a bar in East Village, Manhattan during the 2018 World Cup, running the bar on a revenue share basis to learn fundamentals of a hospitality venture
- **QUALITY CHOP HOUSE:** Spent 6 months re-launching a 150-year-old restaurant in central London. Worked 'on the passe' (the 'bridge') between dining room and kitchen to learn best practices in world class hospitality

*Volunteer Work:* Tutor English and global history at Manhattan Comprehensive High School in Lower Manhattan where students are first generation immigrants with English as a second language

*Languages:* French

*Interests:* Self-professed chess nerd; long-distance cycling, amateur auteur; lover of emerging film, tech and public/private equities

## EDUCATION

### **COLUMBIA BUSINESS SCHOOL**

**MBA**, Real Estate Finance, May 2023

*Honors:* Alexander Bodini Real Estate Fellowship (merit-based scholarship)

New York, NY

2021-2023

### **UNIVERSITY OF SOUTHERN CALIFORNIA**

**BS**, Business Administration, Finance, May 2015

*Minor:* Real Estate Development

*Study Abroad:* France Business School, Poitiers, France (Spring 2014)

Los Angeles, CA

2011-2015

## EXPERIENCE

### **JOHN HANCOCK FINANCIAL (MANULIFE INVESTMENT MANAGEMENT)**

**Senior Asset Management Analyst** (2020-2021)

San Francisco, CA

2020-2021

- Developed and implemented property level strategies for leasing, budgeting, operations and capital expenditures and presented annual business plans to Senior Management
- Managed leasing process including negotiating leases and financial analysis to support decision making across US portfolio
- Maintained Argus models and reported the performance of assets to maximize property income, cash flow and long-term value
- Worked with external appraisal teams to lead quarterly valuation process and recommend asset values
- Managed repositioning and capital projects which included building renovations and rebranding assets

### **BLUEGROUND**

**Business Development Associate** (2020-2020)

Los Angeles, CA

2020-2020

- Supported company's goal of growing from operating 3,000 apartments in 9 cities to 50,000 properties in 50 cities by 2023
- Managed and provided new strategic initiatives to support operational growth
- Prospected, qualified, and presented apartment opportunities in untouched areas within the Los Angeles market
- Negotiated structured and closed favorable apartment lease deals and grow apartment supply pipeline

### **HFF**

**Associate – Debt and Equity Placement** (2018-2019)

Los Angeles, CA

2018-2019

- Prepared approximately one a week of extensive debt offering memorandums for commercial real estate transactions containing market research, financial modeling and composition of executive summaries
- Supported the closure of approximately \$725MM in loans through partnering with the company directors, financial institutions, and clients
- Modeled complex financial models using Excel and Argus to structure bridge loans, construction loans, and refinances
- Managed each stage of a real estate transaction which included conducting property tours, pitching deals to financial institutions and negotiating term sheet

### **EQUITY OFFICE**

**Senior Analyst** (2017-2018)

Los Angeles, CA

2015-2018

- Analyzed lease proposals for Blackstone (parent company) approval using valuation models in Excel using ARGUS generated cash flows
- Modeled cash flows using Excel to underwrite deals and evaluate scenarios to quantify impact on building valuation

**Analyst** (2015-2017)

- Managed 6 million square feet of assets including reviewing leases for accuracy, maintaining leasing pipeline, calculating commissions and tracking deal economics in internal systems
- Evaluated credit of potential tenants, analyzed audited financial statements and provided detailed summaries and recommended security deposit to senior management
- Forecasted and budgeted financial to track performance of assets worth approximately \$500MM for company board meetings

## ADDITIONAL INFORMATION

*Certifications:* CFA Level 3 Candidate, Licensed California Real Estate Broker

*Volunteer Work:* 2020 Co-chair of the Community Outreach Committee for the USC Alumni Real Estate Network

*Interests:* Fitness, travel, and cooking

## MANUELA MANRIQUE

+1 (917) 363 9448, MManrique22@gsb.columbia.edu

### EDUCATION

**COLUMBIA BUSINESS SCHOOL**  
**MBA, Real Estate, May 2022**

New York, NY  
2021-2022

*Leadership:* VP-Site Tours and Company Visits - Real Estate Association, VP-Event- Hospitality Association (VP Events)

*Member:* Gourmet Club, Retail and Luxury Goods Club

*Relevant courses:* Real Estate Finance, Real Private Equity, Capital Markets, Real Estate Portfolio Management, Distressed Real Estate Investing, Global Real Estate Investment, Real Estate Equity Security Analysis, Real Estate M&A, Residential Real Estate

**AMERICAN UNIVERSITY**

**BSBA/BA, Double Major: Business Administration/ Environmental Studies, May 2016**

Washington, D.C.  
2012-2016

*Honors:* Graduated *Cum Laude*, Dean's List

### EXPERIENCE

**TSG-Black Salmon**

Miami, FL  
Summer 2021

*\$1B Commercial real estate private equity and development firm focused on opportunities within the office, industrial, hospitality and healthcare sectors in the U.S.*

**MBA Real Estate Development Intern**

- Updated proformas and conducted sensitivity analysis for a transit oriented master plan, including one hotel with ~450 rooms, three multifamily buildings with ~500 units each and three medical offices buildings. (~ 6 Acres, \$1B project )
- Researched Brickell real estate market for multifamily and office opportunities. Prepared one investment thesis suggesting a mix for a 60 story building with ~200,000 SF office and ~420 apartments for rent, designed by Arquitectonica
- Analyzed South Florida (the second biggest in the U.S.), life sciences medical offices market opportunity for equity partner's review
- Worked with VP of Development to assist in securing entitlement approvals from local agencies

**NM CONSTRUCCION**

Bogota, Colombia  
2018-2021

*Real estate development, sales, and construction. Leaders in Colombia in high-end development (more than 3M sf built)*

**Development Manager**

- Developed initial sales forecasts for the two development projects and underwrote financial models; sold > 50% in both projects in 3 months
- Received 3 necessary entitlement approvals to begin new projects with a resulted 120M USD in sales, by building and maintaining strong relationships with key stakeholders (leaders of municipalities, lawyers, designers, etc.)
- Executed the kickoff campaign of a residential project and sold 65% of the units in 3 months (compared to an average of 6 months-1 year in Colombian luxury market)
- Implemented LEED-certification in residential development projects, resulting in 19% tax cuts in material costs
- Researched new land and reviewed investments, IRR ~20%
- Oversaw due diligence for projects: Torre Once 93 is now one of the company's most successful

**ALIANZA TEAM**

Bogota, Colombia  
2017-2018

*Colombian-based B2C and B2B consumer product multinational with ~550M USD in annual revenues*

**Senior In-House Analyst**

- Developed and designed a corporate venture capital for the company's open innovation strategy
- Supported a due diligence acquisition process of a renowned food company with sales of ~ 80M USD

**CHURCH PENSION GROUP**

New York, NY  
Summer 2016

**Impact Investing Intern**

- Conducted research to present an 18-page Responsible Investing Report to CPG's investment committee; due to overwhelmingly positive feedback, the report was published and presented to the Board of Directors
- Evaluated potential opportunities and strategies in mid-scale solar energy to incorporate to SRI Portfolio; 25M-35M USD

### ADDITIONAL INFORMATION

*Work Authorization:* OPT STEM 3 years

*Certification:* Real Estate Financial Modeling (Wall Street Prep), ARGUS Enterprise

*Member:* FIABCI (International Real Estate Federation) and Colombian Council of Sustainable Construction

*Languages:* Spanish, Native Speaker

*Interests:* Cycling, Minimalist Architecture, Green Building, Mindfulness

# Arsean Maqami

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## EDUCATION

- COLUMBIA BUSINESS SCHOOL**, New York, NY 2020 - 2022  
**MBA**, Real Estate  
Assistant Vice President of the Real Estate Association
- SWARTMORE COLLEGE**, Swarthmore, PA 2008 - 2012  
**BA**, Economics & Statistics

## EXPERIENCE

- SERITAGE GROWTH PROPERTIES (SRG)**, New York, NY 2021 - Present  
**Vice President of Development & Construction**
- Managing the Development, Design and Construction for 45 assets in the Seritage portfolio located in the Southeast and West Coast
  - Managing two teams consisting of 4 people
  - Leading the redevelopment of key projects including Aventura Mall, UTC La Jolla, Santa Monica, Cutler Bay, Plantation, Roseville, and Bradenton. Total asset value is greater than \$500MM
- DESIGN BUILD PARTNERS**, New York, NY 2019 - Present  
**Founding Principal**
- Led the redevelopment of an 56,000 square foot office building in McKinney, TX
  - Design and Construction of a 65,000 square foot cold storage facility
  - Design and construction of over of \$1.25MM of outdoor dining structures
  - Clients include Steven Starr Restaurant Group, Washington Hospitality Restaurant Group, Somera Road, Seritage Growth Properties, REEF, JuicePress, Industrious, and
- WEWORK**, New York, NY & San Francisco, CA 2018 - 2019  
**Senior Director of Development & Construction**
- Managed the P&L of WeWork Construction LLC, a general contractor acquired by WeWork in New York City
  - Integrated an acquired general contracting business in three months, including merging accounting, hiring, safety, and estimating
  - Built over 1.4 million square feet of retail, a food laboratory, and office space
  - Managed a team of 112 people and hired 51 employees
  - Managed \$247 million in capital expenditures
  - Launched a general contracting business in California and Washington with offices in Los Angeles, San Francisco and Seattle
- OWOW REAL ESTATE DEVELOPMENT**, San Francisco, CA 2017 - 2018  
**Director of Development**
- Led the development strategy for five multi-family developments in Oakland totaling 331,000 Square Feet
  - Obtained entitlements and city approval for sites in Oakland
- WEWORK** 2013 - 2017  
**Senior Project Manager**, Los Angeles, CA & Mexico City, MX
- Designed and built over 173,000 Square Feet in Los Angeles and Mexico City
  - Managed over \$24,000,000 in project expenditures
- Project Manager**, New York, NY
- Designed and built over 210,000 Square Feet in Los Angeles, San Francisco, San Jose, New York City, Seattle, and Austin
  - Managed over \$38,000,000 in project expenditures
- KEYSTONE**, Conshohocken, PA 2012 - 2013  
**Analyst**



# SAMANTHA MCPADDEN

LICENSED ARCHITECT

70 West 68th St.  
Apt. 1F  
New York, NY  
10023

## EDUCATION

Columbia University, Graduate School  
of Architecture, Planning and Preservation.  
M.S Real Estate Development '22 Candidate

University of North Carolina at Charlotte  
Bachelor of Architecture , GPA: 4.0  
Bachelor of Arts in Architecture , GPA: 3.8  
Art History Minor, Magna Cum Laude  
Graduated May 2015

Central European Cities Study Abroad  
Munich, Vienna, Budapest,  
Krakow, Prague, Berlin  
Jewish Heritage and Central European Cities  
Summer 2012

## REGISTRATION

National Council of Architectural Registration  
Boards, Registered Architect

North Carolina Board of Architecture,  
Registered Architect

## AWARDS + HONORS

AIA Henry Adams Medal  
Highest cumulative grade point average of  
graduating students in the  
School of Architecture, Spring 2015

Arts and Architecture Honors Program  
Active Member and Honoree, Completed final  
semester-long thesis, 2010-2014

Excellence in Architectural History  
Graduation Book Award, Spring 2014

The Boardman Architecture Honor Fellowship  
Scholarship Recipient, Spring 2014

School of Architecture Prospectus  
Second year project published in  
School of Architecture publication, 2012

## EXPERIENCE

### Fleetwood Fernandez Architects, Los Angeles, CA

Project Architect, 2018 - present

- Design and manage twelve small to medium scale, multi-million dollar projects, including a \$800 / square foot single family prefab, off-grid home and a 27,000 square foot restaurant with subterranean parking deck.
- Coordinate design decisions cross-functionally between consultants, engineers, and clients through all phases of design from conceptual to contract administration.
- Implement scheduling and bid tracking processes to facilitate project Value Engineering.
- Ensure that designs are within federal and local codes, standards, and procedures.
- Produce graphic representation of projects, working on a marketing strategy for the redesign of the company website and rebranding of visual identity of firm.
- Key Projects:
  - Hillstone Restaurant, Del Mar, CA, 2015 - ongoing
  - Saint-Marc Hillside Residence, Haiti, 2019 - ongoing
  - Bamboo Lane Live-Work, Los Angeles, CA, 2019 - ongoing

Designer, 2015 - 2018

- Assisted in production of construction documents while applying knowledge of zoning and planning regulations.
- Spearheaded five international design competitions.

### Nka Foundation, Ghana

Co-Project Manager and Designer, June 2017 - September 2017

- Designed and built a competition-winning design project in rural Ghana using earth construction techniques in rural village.
- Recruited + selected a team of 20 international volunteers and raised capital using crowdsourcing to build a 1,000 ft<sup>2</sup> clinic.
- Created + delegated project schedule to a team of 6 local builders and 20 volunteers. Coordinate with village leadership.

### Rural Initiative Partnership, North Carolina

Preservation Designer, May 2014 - May 2015

- Worked with a team to develop, design, and present preservation strategies involving modernizing historic Rosenwald schools throughout rural North Carolina.

## VOLUNTEER

Impact Investing Club, Social Chair, 2021 - present

Collaborate with other members of the executive committee and board of directors to create and execute events for the club constituency.

All Together LA, Neighborhood Volunteer, 2020 - 2021

Safely provide 2 disabled neighbors with weekly groceries and medicine during Covid 19 pandemic.

Downtown Women's Center, Kitchen Assistant, 2019 - 2020

Serve breakfast weekly to 60 women experiencing homelessness in Skid Row, Located in Los Angeles, CA.

Freedom by Design, Development Manager, 2012 - 2013

Organize volunteers to build an outdoor learning center for Charlotte, NC Montessori School.

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, Real Estate, May 2022

New York, NY

2020-2022

*Honors:* Columbia Fellow Merit Scholarship, Forte Fellow

*Leadership:* VP Real Estate Association, VP Columbia Women in Business, VP Jewish Business Student Association, Student Ambassador (Hermes Society)

*Member:* Non-Profit Board Leadership Program, Health and Wellness Club

### THE UNIVERSITY OF MICHIGAN

**BA**, Economics and Organizational Studies, April 2017

Ann Arbor, MI

2013-2017

*Honors:* The National Society of Collegiate Scholars, University Honors, James B. Angell Scholar, Phi Beta Kappa National Honors Society, High Distinction

*Leadership/Internship:* Research Assistant for study on the psychology of prejudice and inequality, Event Committee Lead for Organizational Studies Advisory Board, Liberty Mutual Summer Intern

## EXPERIENCE

### BLACKSTONE

**Summer Associate, Real Estate**

New York, NY

Summer 2021

- Supported capital raising efforts for Core+ Real Estate funds through strategic projects and creation of marketing materials
- Drafted communications to investors pertaining to Real Estate transactions and fund strategies and fulfilled diligence requests
- Leveraged external real estate databases and resources to conduct research for leadership led initiatives

### PGIM REAL ESTATE

**Project Manager MBA Intern, Global Innovation Group**

New York, NY

Spring 2021

- Researched Proptech verticals and developed database of best technologies for further exploration and pilot programs
- Connected with internal and external stakeholders to support interest in new technologies
- Developed strategy for installation of Electric Vehicle Chargers across Real Estate sectors

### THE BOSTON CONSULTING GROUP

**HR Analyst**

Boston, MA

2019-2020

- Independently learned Microsoft PowerBI data visualization tool and introduced it to team, maintained dashboards to equip team with accessible and up-to-date employee metrics that were previously unavailable or time-consuming to attain
- Conducted analysis of annual employee survey results for ~1300 Global Services employees across 10 functions and 6 global hub offices, created and presented PowerPoint decks to HR Business Partners and Office leads
- Analyzed performance ratings of ~1300 global employees, presented results to leaders to ensure performance targets were met
- Created tool to translate HR system fields and terminology to the logic of Workday system prior to implementation, built survey and analyzed results during Workday testing for employees globally and across business systems
- Managed renewable energy project as member of BCG Green Team; collaborated on office-wide sustainability initiatives such as providing reusable silverware, reducing food waste, and introducing composting throughout the building
- Nominated and selected as an ally to support the PRIDE network and demonstrate commitment to diversity and inclusion

### LIBERTY MUTUAL INSURANCE

**Talent Delivery Team Specialist- HR Development Program Associate (2018-2019)**

Boston, MA

2017-2020

- Supported business leaders through talent related annual processes with delivery of succinct reports and quality analysis
- Completed and presented survey analysis, executed talent forums, and created career development resources

**Talent Analytics Analyst- HR Development Program Associate (2018)**

- Worked as internal consultant to improve HR efficiencies, e.g. used cost and quality of hire data to optimize candidate interviews
- Built queries and pulled reports from SAS, PowerBI, and Taleo to fulfill HR data requests from across the business
- Created and led Excel training for ~30 HR professionals, training was repurposed and offered to additional teams

**Experienced Talent Acquisition Project Manager- HR Development Program Associate (2017-2018)**

- Developed project timelines, led meetings, and wrote and distributed communications leading up to implementation of a mentorship program for Veteran employees
- Planned events for Employee Resource Groups including a Veteran's Day Event featuring a Tuskegee airman with 100+ attendees and a Pride event hosting an LGBTQ speaker with 50+ attendees

## ADDITIONAL INFORMATION

*Certifications/Skills:* SAS, PowerBI, 200 hr Yoga Teacher Certification

*Volunteer Work:* Tutoring Plus of Cambridge Tutor, Falmouth Road Race Charity Runner, Nantucket Boys & Girls Club

*Languages:* Proficient in Spanish

*Interests:* Running charity road races, Yoga for healing and mental health, Environmental Sustainability

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate and Finance, May 2022

New York, NY

2021-2022

*Leadership*: Vice President of Real Estate Association, Co-President of Korean Business Association*Teaching Assistant*: Real Estate Equity Securities Analysis, Real Estate Debt Markets**KOREA UNIVERSITY****BA**, Economics and Financial Engineering, August 2014 (GPA: 3.77/4.5)

Seoul, Korea

2008-2014

*Honors*: Received merit-based academic scholarships for four semesters (2012-2014)*Leadership*: Vice President of Management Consulting Club*Study Abroad*: State University of New York at Buffalo (GPA: 3.65/4.0)**EXPERIENCE****LOVETT INDUSTRIAL***Vertically integrated logistics real estate development firm (over 2 million SF under construction)*

Houston, TX

2021

**MBA Intern, Development Team**

- Underwrote 75 acres ground lease opportunity to develop about 1 million SF logistics centers in Phoenix, AZ
- Implemented the firm's acquisition initiative for the first time; bid for \$116 million logistics center in Houston, TX
- Facilitated cross-border capital raising by bridging the firm with major Asian investors such as Mirae, IGIS, NH and KB

**MIRAE ASSET GLOBAL INVESTMENTS***Korea's second largest investment management firm (total AUM \$194 billion)*

Seoul, Korea

2017-2020

**Manager, Global Acquisitions Team, Real Estate Investment Division**

- Analyzed 130+ real estate projects and engaged in more than \$8 billion in aggregate deal size executed to date; participated in a full range of due diligence, underwrote financial model, and prepared investment memorandum
- Managed and monitored a lawsuit associated with the acquisition of Strategic Hotels & Resorts, 15-luxury-hotel portfolio in the U.S. worth \$5.8 billion, in collaboration with internal legal team and litigation attorneys
- Conducted extensive research on Poland logistics markets and determined efficient tax structure to cope with newly changed local tax scheme; contributed to the firm's first acquisition in logistics sector in Europe
- *Notable Transactions*
  - Closed \$450 million prime office property in London, U.K., occupied by Barings as its headquarters in Europe
  - Closed \$365 million last-mile logistics portfolio in the U.S., occupied by Amazon and FedEx

**LASALLE INVESTMENT MANAGEMENT***One of the world's largest real estate investment management firms (total AUM \$69 billion)*

Seoul, Korea

2015-2017

**Analyst, Client Capital Group**

- Identified prospective clients' investment preferences and marketed customized real estate products; ranked top performing team among 24 global offices by raising more than \$1 billion client capital
- Streamlined the firm's scattered and inaccurate transaction data in Europe over the past 20 years, and organized the firm's track record; contributed to winning National Pension Service (NPS)'s \$330 million mandate in Europe
- *Notable Transactions*
  - Closed \$630 million worth of two separate accounts for NPS, the fourth-largest pension fund in the world

**BNP PARIBAS****Junior Sales/Sales Assistant, Equity Division**

Seoul, Korea

2014-2015

- Proposed buy/sell ideas on Korean stocks, and contributed to securing \$5 million transactions with NPS for the first time

**EIGHT UNITED STATES ARMY****Sergeant, 19<sup>th</sup> Expeditionary Sustainment Command**

Daegu, Korea

2009-2011

- Supervised 60 soldiers as a company leader and facilitated communication between Korea and US Army commanders
- Granted *KATUSA of the Quarter* and *Army Commendation Medal*

**ADDITIONAL INFORMATION***Volunteer Work*: Young Leaders Group at Urban Land Institute (2016-2017); organized mentoring sessions for college students*Interests*: Exploring new cities, enthusiastic runner (half marathon and duathlon), and golfer

## Nikolaos Papageorgiou

200 W 67<sup>th</sup> St, New York, NY 10023 • np2791@columbia.edu • (646) 244-6884 • linkedin.com/in/n-papageorgiou

### EDUCATION

#### Columbia University – New York, NY

exp. May 2022

*Master of Science in Real Estate Development*

#### Claremont McKenna College – Claremont, CA

Sep 2015 – May 2019

*Bachelor of Arts in Economics with Minor in Financial Economics*

### PROFESSIONAL EXPERIENCE

#### AXIA Ventures Group – Athens, Greece

Jun 2019 – Feb 2021

*Investment Banking Analyst*

- Created complex financial models: DCF, LBO, Trading and M&A Transaction Comps, Sum-of-the Parts analysis
- Prepared and reviewed marketing and legal documents: teasers, pitch books, IMs, engagement letters, term sheets
- Engaged in transactions in several sectors such as real estate, shipping, industrials and FIG
- Participated actively in the recruitment and training of interns and analysts

#### Selected Transaction Experience:

- Advised Alpha Bank, a Greek Systemic Bank, in relation to the sale via securitization of a €10.8bn NPL portfolio to Davidson Kempner (2021)
  - Led the coordination of all workstreams of the transaction between the seller, potential buyers and deal advisors
- Advised a private equity fund on a leveraged buyout of a company owning a fleet of 23x tanker vessels (US\$330mm, 2020)
  - Built the financial model incorporating, among others, hive down of assets into SPVs, interim vessel disposals and advanced debt schedules
- Advised a group of certain noteholders in relation to a leading gaming solutions supplier & operator's financial restructuring (€750mm, 2020)
  - Conducted necessary analysis of company's financials, assessed financial issues & options, drafted and reviewed transaction documents
- Advised Lamda Development S.A. on its capital raising effort to implement Project Hellinikon (€650mm, 2019)
  - Prepared the roadshow presentation and reviewed transaction documents
- Advised Värde in valuing Trastor (4<sup>th</sup> largest Greek REIC) in relation to the issuance of a convertible bond and a share capital increase (2019)
  - Built the financial model, including public company comparables, precedent transactions, and DCF; created full valuation deck

#### AXIA Ventures Group – Athens, Greece

May 2018 – Jul 2018

*Investment Banking Summer Analyst*

- Built financial models (NAV models, sensitivity analyses, and debt schedules) for a €200mm joint venture
- Drafted pitch book for the sale of a series of NPL exposures of selected Greek corporates and shipping firms
- Researched and identified potential acquisition targets

#### Secure Property Development & Investment PLC – Athens, Greece

Jun 2017 – Aug 2017

*Summer Financial Analyst*

- Ran valuation models and generated cash flows for new and current investments
- Analyzed business plans (financial restructuring, loan repayment, and tax planning) for 4 projects
- Conducted in-depth market research to draft market analysis portion of half-year report

### LEADERSHIP & ACTIVITIES

#### Sagehen Capital Management (student-run hedge fund with US\$1mm AUM) – Claremont, CA

Sep 2017 – May 2019

*Senior Analyst*

- Performed valuation analyses (DCF & trading multiples); presented investment thesis for Cheniere; resulted in 17.8% return within 6 months

#### Alpha Epsilon Pi – Claremont, CA

Apr 2017 – May 2019

*Treasurer, Executive Board Officer*

- Created and managed US\$18k operating budget for a 20-member organization; elected 2 consecutive times
- Propelled organization out of insolvency caused by previous management

#### Claremont Colleges Hellenic Society – Claremont, CA

Jan 2016 – May 2019

*Co-Founder and President*

- Co-Founded club and recruited over 40 members from 5 universities; organized monthly events and speakers
- Led fundraising campaign; surpassed goal of US\$6k by 83%, raising US\$11k in 3 months

#### Financial Economics Institute – Claremont, CA

Jan 2018 – Dec 2018

*Research Analyst for Professors Eric Helland and Darren Filson*

- Collected and analyzed data on the financial performance of global film franchises using Stata

### ADDITIONAL INFORMATION

**GMAT:** 720 (94<sup>th</sup> percentile)

**Technical Skills:** Microsoft Office, Capital IQ, Bloomberg Terminal, Merger Market, Tableau, Stata

**Languages:** English (fluent), Greek (fluent), French (intermediate)

**Interests:** Competitive equestrian show jumping (many 1<sup>st</sup> & 2<sup>nd</sup> awards in European championships), skiing, tennis

## **Dominic V. Perkaj**

1134 First Avenue, New York, NY 10065

248-881-6609 • dperkaj23@gsb.columbia.edu • <https://www.linkedin.com/in/dominic-perkaj/>

### **EDUCATION**

#### **Columbia University, Columbia Business School**

Master of Business Administration

New York, NY

Anticipated April 2023

#### **Columbia University, Columbia College**

Bachelor of Arts in Political Science

New York, NY

August 2014 – May 2018

### **PROFESSIONAL EXPERIENCE**

#### **VTs**

New York, NY

Client Advisor

May 2021 – Present

- Work directly with over 35 of VTs's largest landlord clients to assist them in shaping better processes, drive technology adoption across the platform and ensure they are achieving their outcomes on VTs by providing industry best practices for businesses, domain expertise and relationships with peers, platform adoption monitoring to drive outcomes, and portfolio and market insights to power leasing.
- Work internally with the sales, implementation, and product teams at VTs to ensure coordination in our approach with clients, as well as externally with various stakeholders, asset managers, property managers and leasing professionals so that all parties understand the technology, how best to use it, and its benefits.
- Conduct client technology training sessions, executive business reviews, and lead regular meetings during the technology implementation phase to ensure the proper adoption of VTs and to assist with potential issue resolution.
- Remain the lead point of contact for each of the client accounts assigned to me throughout their time working with VTs for regular check ins and updates on client utilization and adoption of the platform.

#### **Avison Young**

New York, NY

Commercial Real Estate Advisory and Transaction Services

July 2018 – April 2021

- Specialized in real estate transactions with a focus on supporting office landlords in the disposition of vacant space and assisting businesses in the development of effective real estate strategies for their headquarters office locations. Responsibilities included account management, coordination between several leasing teams of 3-5 individuals, proposal drafting and review, lease review, financial analysis, conducting on-site inspections and tours and developing effective marketing strategies.
- Worked directly with Tri-State President, Arthur J. Mirante II, as his business partner where I was responsible for all aspects of account management, partnering with clients to develop the most effective real estate strategies.
- Directly involved in leasing over 600,000 square feet of office space on both the tenant and landlord side during my time at Avison Young.

### **LEADERSHIP EXPERIENCE**

#### **Columbia University, Columbia Business School**

New York, NY

Community Representative (Cluster E)

May 2021 – Present

- Assist in promoting academic integrity and the Honor Code within the cluster.
- Facilitate community by planning CBS Matters events for the cluster and serve on the selection committee for the EMBA Recognition Ceremony keynote address.
- Work closely with four other student government positions within the cluster and five student government positions in the other EMBA cluster to ensure we are all aligned with regard to planned events and interactions between our groups.

#### **HELP USA**

New York, NY

Co-Founder and Chairman of the HELP USA Associate Board

May 2019 – Present

- Co-founded the HELP USA Associate Board: developed the organizational structure, hand recruited over twenty new board members and secured a \$20,000 budget for our first year of operations through a presentation to the HELP USA Board of Directors.
- Raise awareness and funds to fight chronic homelessness through hosting volunteer and fundraising events, publicizing the impact of HELP USA's work, and connecting the organization to new partners.

#### **Columbia Football Player's Club**

New York, NY

Board Member and Co-Chairman of the Mentorship Committee

November 2017 – Present

- Attend monthly board meetings/calls where we discuss strategy on bettering the Columbia football program, maximizing our fundraising efforts, and bringing alumni together to benefit current student-athletes.
- Lead the Shadow-a-Lion program designed to educate freshmen and sophomores on networking/relationship building. Through this program, I serve as a direct liaison between the current football athletes at Columbia University and our alumni base.

#### **Columbia University, NCAA Division I Varsity Football Team**

New York, NY

Defensive Lineman, Tackle

August 2014 – November 2017

- 3-year starter that dedicated 40 hours per week to practice, conditioning, competition, and team meetings.

### **HONORS**

2021 Ones to Watch by the New York Real Estate Journal

Columbia Football Maniatty-Remmer Unsung Hero Award

ALL-IVY Defensive Tackle

### **SKILLS AND INTERESTS**

- Computer: Microsoft (Word, Excel, PowerPoint, Office)
- Language: Fluent in Albanian and Intermediate in Spanish
- Interests: Volunteering with HELP USA, mentoring current student-athletes at Columbia University, spending time with family and friends, yoga, lifting weights and running

## PROFESSIONAL EXPERIENCE

### The Anibar Group

Berlin & New York

*Independently-owned real estate investment company specializing in creating value from under-performing assets*

#### Founder and Principal

April 2014 – Present

- Raised over \$80M in equity and debt for over a dozen real estate transactions focusing on multifamily properties in 6 countries (US, UK, Germany, Spain, Israel, Portugal) targeting gut renovations, conversions, and value add plays
- Lead financial strategy including deal sourcing, financing, and underwriting (coordinating legal team of 6); establish property vision, select and manage vendors (approx. 20/project) and oversee construction management
- Manage internationally-located staff of 8 in managing over 200,000 sq. meters of residential and office space

### Adam America Real Estate Development

New York

*Real estate development and investment group with \$1.6B in assets and investments in the NY Metro area*

#### Director of Finance

August 2013 – July 2015

- Managed accounting, legal, underwriting and marketing teams (10 staff total) on more than 2 dozen purchases, sales, and financing deals; contributed to investor returns of 40 to 65% IRR
- Raised more than \$150M in equity from individual and institutional investors and more than \$450M in promissory notes from banks, pensions funds, and insurance carriers
- Oversaw investor relations: served as point of contact, created and delivered investor reports, and pitched new projects

#### Financial Analyst and Controller

October 2012 – August 2013

- Built and managed accounting team of 3, established financial reporting and control procedures for investors and regulatory institutions, ensuring on-time delivery of over 200 financial reports annually
- Researched and analyzed potential investments and real estate trends by neighborhood; recommended optimal value adds and assisted project managers in achieving ideal concepts and unit distribution at each property

### Rabina Properties

New York

*Family-owned & operated real estate developer & investor with over 20M sq feet in commercial & residential properties*

#### Property Manager

October 2011 – October 2012

- Managed 9 union employees in the maintenance of 169-apartment, 5-retail space building in Manhattan's East Village; led building's relationships with real estate brokers, tenants, city, state, and federal authorities
- Controlled annual operational expense budget of \$3.5M; oversaw expenditures for \$1.2M renovation and led negotiations with renters; efforts increased net operating income by \$1M in Q4, an increase of 15%
- Initiated tenant outreach and retention program including welcome packages and bi-annual social that attracted quality renters by word of mouth and helped maintain building's 99% occupancy rate

## EDUCATION

### Columbia University

#### Master of Science, Construction Administration

New York City, NY

August 2020 – August 2021

- Columbia Fellow, Construction Fellow

### Ben Gurion University of the Negev

Be'er Sheva, Israel

#### Bachelor of Arts, Economics and Accounting

October 2008 – August 2011

- Student Council Member (2009 – 2011), created campus-wide neighborhood watch in partnership with local police
- Finance Committee Chairman for Student Day Festival; managed \$2M budget

## MILITARY SERVICE

### Israel Defense Forces, Human Resources

Tel Aviv, Israel

#### Chief of Staff [Staff Sergeant]

February 2006 – March 2008

- Supervised 7 soldiers in management of all administrative affairs for unit's commander, a brigadier general
- Coordinated transfer of organization's pension funds from one bank to another, in accordance with gov't reforms

#### Bureau Head & Social Services Coordinator [Corporal]

April 2005 – February 2006

- NCO commanding 3 soldiers, coordinated benefits for non-citizen volunteers and soldiers with special circumstances
- Ensured thousands of soldiers received benefits and managed special cases, such as immigrant and economically distressed soldiers

## COMMUNITY INVOLVEMENT AND ADDITIONAL INFORMATION

MENSA – active member in education, leadership, and community service activities (2002 – Present)

Berlin Animal Shelter – volunteered 2 hours/week cleaning facilities, walking dogs, and fundraising (2017 – 2019)

Interests: Avid traveler (visited 100+ countries), music enthusiast (20 years playing drums, played in 5 bands), long-distance running (completed Berlin Half Marathon)

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

MBA, Real Estate Program, May 2022

Member: Real Estate Association

Course Assistant Professor Brian Lancaster, Real Estate Debt Markets.

New York, NY

2021-2022

### UNIVERSIDAD DE CHILE

BS, Industrial Civil Engineering, Aug 2012

Santiago, Chile

2006-2012

## EXPERIENCE

### BCI ASSET MANAGEMENT

*One of the largest Chile's assets manager.*

**Portfolio Manager** (Jan 2018 - Dec 2020)

Santiago, Chile

2015-2020

- Oversaw two real estate investment funds with a combined \$100M in assets under management (AUM) through a strategic partnership with Moller y Pérez-Cotapos.
- Administered an independent real estate investment fund with \$10M in AUM.
- Provided input and oversight as a board member of SPVs in which our funds had a significant stake.
- Cultivated relationships with large builders in Chile and abroad.
- Led fund placement roadshows and managed relationships with institutional investors, family offices, and high net worth individuals.
- Sourced and prioritized new real estate investment opportunities.

### Senior Analyst – Alternative Assets (Nov 2016 - Dec 2017)

- Orchestrated new partnership agreements from target outreach to signing and launch.
- Conducted valuation analysis and deal structuring for alternative asset transactions.
- Participated in fund placement roadshows while serving as an investor point of contact.
- Co-managed four real estate investment funds with a combined \$30M in AUM.
- Provided input and oversight as a substitute board member of SPVs in which our funds had a significant stake.

### Senior Analyst – Real Estate Investment (Apr 2015 - Nov 2016)

- Assessed real estate investments for different asset classes identifying strengths and weaknesses of proposed transactions in Chile and abroad.
- Participated in transaction due diligence and provided deal negotiation support.
- Co-managed four real estate investment funds with a combined \$30M in AUM.

### PATAGON LAND INVESTMENT

**Analyst – Real Estate Investment** (Jul 2013- Apr 2015)

Santiago, Chile

2013-2015

- Evaluated and tracked real estate investments for different asset classes.
- Participated in fund structuring for real estate investment transactions.
- Prepared monthly reports and materials for the investment committee meetings.

### FALABELLA

**Financial Planning Engineer** (Oct 2012- Jul 2013)

Santiago, Chile

2012-2013

- Conducted assessment of real estate development projects and industry benchmarks.
- Prepared annual forecasting report as well as annual budget estimates.

## ADDITIONAL INFORMATION

Memberships: ACAFI, Contribute to the improvement and development of the investment fund management industry in Chile, particularly Real Estate Investment Funds (2018 – 2020).

Certifications: Alternative Investment Diploma in 2018, Certificate of Accreditation of knowledge in the securities market in 2019.

Volunteer Work: Math tutor for students from high-risk neighborhoods (2008-2010). Consultant for micro-entrepreneurs (2010-2012).

Languages: Spanish (native speaker)

Interests: Soccer, running, skiing, and travelling (visited 40 countries across 5 continents).

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA, Real Estate & Venture Capital, May 2023**

New York, NY

2021-2023

**GEORGETOWN UNIVERSITY****BSBA, Finance & Marketing, May 2016**

GPA: 3.72

Washington, D.C.

2012-2016

*Honors:* Magna Cum Laude, Alpha Mu Alpha, Second Honors and Dean's List (all semesters), WX Scholar (2016)*Leadership & Study Abroad:* Universidad Pontificia Comillas ICADE in Madrid, Spain; Georgetown University Real Estate Club, Board Member; Georgetown Stride for College, Treasurer (2 years) and Mentor (4 years); Georgetown Blue & Gray Society, Tour Guide**EXPERIENCE****LETTEY***iOS/Android application startup designed to modernize and simplify the direct rental and subletting process by connecting users through social networks and by vertically integrating renting-related tasks.*

New York, NY

Summer 2021

**Business Development Intern**

- Source landlords and property management companies to participate in Beta launch of the application

**STOCKBRIDGE CAPITAL GROUP***Real estate investment management firm with equity investments across the risk spectrum within a variety of investment structures on behalf of U.S. and foreign institutional investors.*

San Francisco, CA

2017-2021

**Portfolio Associate (2020-2021)**

- Manage and train two new Portfolio Analyst hires

**Portfolio Analyst (2017-2020)**

- Perform analytical duties for the firm's Value Fund Series I, II, III & IV, with \$218 million, \$321 million, \$355 million and \$562 million in equity commitments, respectively, and two separate accounts totaling approximately \$750 million and \$220 million in assets under management, investing in all major property types and markets across the U.S.
- Assisted in approximately \$1 billion in acquisitions, \$1 billion in dispositions and \$500 million in financings for the firm's Value Fund Series and two separate accounts
- Maintain fund-level and property-level underwriting to assist in investment decisions to maximize fund returns
- Perform hold/sell/buyout/refinance analysis to determine the most accretive strategy on a go forward basis
- Prepare quarterly investment reports, annual budgets and business plans and other presentation materials or requests for proposals both for fundraising purposes and for existing investor correspondence
- Perform/review property valuation models on a quarterly basis using Argus Enterprise and discounted cash flow analysis, present valuations to Investment Committee
- Work with asset management team to monitor ongoing leasing efforts, capital projects and property level budgets

**BANK OF AMERICA MERRILL LYNCH****Investment Banking Analyst – Consumer & Retail Group**

New York, NY

2016-2017

- Support senior team by preparing materials for various meetings and presentations, such as advising clients on potential M&A opportunities, leveraged buyouts and capital restructuring
- Perform company valuations using the following methods: detailed stand-alone, discounted cash flow, comparable company, precedent transactions, leveraged buyout and accretion/dilution
- Select Transaction Experience: Advised retail client on potential ~\$900mm acquisition opportunity of certain brands offered for sale by another retailer in financial distress using five distinct valuation methods, including: preliminary discounted cash flow, selected transaction precedents, public trading multiples, Wall Street Research analysis, and licensing valuation

**ADDITIONAL INFORMATION***Skills:* Microsoft Office (Excel, PowerPoint, Word), Argus Enterprise and DCF*Professional Development:* NAIOP Young Professionals Group, Class of 2020*Languages:* Proficient in Spanish*Interests:* golf, running (marathons/half marathons), cooking, hiking, skiing, tennis



# VIVIAN TENG

510-246-9289 | [vivian.teng@columbia.edu](mailto:vivian.teng@columbia.edu) | <https://www.linkedin.com/in/viviandteng/> | Portfolio: <https://www.viviandteng.com>

## EDUCATION

**Columbia University GSAPP**, New York City, NY

Master's of Science in Real Estate Development ..... June 2021 - May 2022

**Carnegie Mellon University**, Pittsburgh, PA

Bachelor of Arts in Architecture, Business Administration ..... August 2017 - May 2021

University Honors, College Honors

**Universitat Autònoma de Barcelona**, Barcelona, ES

Summer Study Abroad, Focus in Urban Planning of Barcelona ..... June - July 2018

## EXPERIENCE

**Hexadon Studios**, New York City, NY (Remote)

Project Manager ..... May - July 2020

- Led team of five (software developers, graphic designers) in developing Godot based game, Hell Mail.
- Scheduled and led weekly meetings to track progress, contributions, and delegate tasks to team members.

**Carnegie Mellon University**, Pittsburgh, PA

Undergraduate Teaching Assistant ..... August 2019 - August 2020

- Facilitated discussion among 70 first year architecture students regarding studio culture and adjusting to university life.
- Presented to first years about portfolios and professional development.

School of Architecture EX-CHANGE Public Relations Assistant ..... January 2020 - May 2020

- Created PR Calendar and drafted PR materials for online media to promote school-wide architectural exhibition.

Employer Relations Ambassador ..... August 2019 - March 2020

- Assisted with seven career fairs in employer outreach to over 100 companies.
- Ran and analyzed reports in the Career and Professional Development Center for career fairs logistics.

Andrew Ambassador ..... January 2018 - May 2019

- Customized and led campus tours of up to 100 people for prospective families of diverse backgrounds.
- Answered emails representing the Undergraduate Office of Admissions.

**Mario Corea Arquitectura**, Barcelona, ES

Summer Intern ..... June - August 2019

- Translated and edited publications of projects in English and Spanish for online media.
- Created AutoCAD drawings and schemes for projects, including a large-scale hospital in Tarragona.
- Conducted research on interviewees the firm hosted.

**ZenArchi (展宜建築)**, Taipei, TW

Architectural Intern ..... July - August 2018

- Created SketchUp models of current projects, including apartment units in Taipei City.
- Took architectural photos of project sites for display and publication.

## INVOLVEMENT

**Taiwanese Students Association**, Pittsburgh, PA

Overall Booth Chair ..... August 2018 - May 2021

- Oversaw and led design, budgeting of \$3000, and team of 50 people for 20' x 20' carnival booth.
- Drafted plans to ensure that booth was up to construction standards and building code such as joist spans.

**Kappa Alpha Theta Sorority**, Pittsburgh, PA

Scholarship Director ..... December 2019 - January 2021

- Reviewed grades, then strategized and created action plans to improve and advise on grades for 75+ members.
- Planned annual scholarship reception for professors and members.
- Wrote semi-annual report of chapter updates for alumni and National Headquarters.

**American Institute of Architecture Students**, Pittsburgh, PA

Social Media Correspondent ..... June 2018 - May 2019

**Club Volleyball**, Pittsburgh, PA ..... August 2017 - May 2021

## SKILLS

**Languages:** English, Mandarin, Spanish (intermediate)

**Software:** Microsoft Excel, Photoshop, Illustrator, Lightroom, AutoCAD, Rhino, VRay, Grasshopper, R Studio

# KRYSTEL TERZIS

Email: krystel.terzis@gmail.com

Nationalities: Greek and Lebanese

## EDUCATION

2021-2022	<b>COLUMBIA, Graduate School of Architecture, Planning and Preservation</b> Master's in Real Estate Development	<i>NY, United States</i>
2008-2009	<b>INSEAD, Graduate School of Business</b> Master's in Business Administration	<i>Paris, France</i>
2006	<b>STANFORD, Graduate School of Business</b> Summer Institute of General Management	<i>CA, United States</i>
2000 – 2004	<b>AMERICAN UNIVERSITY OF BEIRUT, Faculty of Engineering</b> Bachelor of Computer and Communications Engineering	<i>Beirut, Lebanon</i>

## PROFESSIONAL EXPERIENCE

Jan 2010 – Jan 2021	<b>NAMA CAPITAL</b> <b>Founding Partner</b> <ul style="list-style-type: none"><li>• Provided advice to family offices and private investors regarding investment decisions in technology, hospitality, and real estate.</li><li>• Conducted analyses of the real estate market – prices, new developments, laws, etc.</li><li>• Elaborated property development plans for acquisition, construction and exit phases (projects size \$100-150 million) in both residential and hospitality sectors.</li><li>• Advised and manage land-parceling projects.</li><li>• Worked with investors in real estate market to put in place the project's identity and funding strategy - construction budget (\$5-20 million), sales revenues (\$20-100 million), financing structure etc. for residential and hospitality projects.</li><li>• Monitored real-estate projects implementation, and manage relations with architects, contractors, brokers, engineers and other “on the ground” stakeholders.</li><li>• Prepared board reporting and participated actively to board meetings.</li><li>• Advised on operating and capital budgeting, as well as diversification strategies for SMEs in different sectors.</li></ul>	<i>Lebanon</i>
Sep 2009 - Dec 2009	<b>FFA REAL ESTATE</b> <b>Project Manager</b> <p><i>FFA Real Estate S.A.L. is a member of FFA Private Bank, an independent private bank that was founded in 1994 and has established itself throughout the Levant and the GCC.</i></p> <ul style="list-style-type: none"><li>• Managed the US\$ 13 million buy-out of NAAS Water Bottling Company by acquiring a controlling interest of 90% of its shares.</li><li>• Developed presentations and pitches to investors, built operational and valuation models to support negotiations, and managed interactions with advisors, lawyers, and accountants.</li><li>• Defined the business development and funding (US\$ 60 million) strategies for real estate development and operations.</li></ul>	<i>Lebanon</i>
Oct 2004 - Dec 2009	<b>THE GLOBAL FUND</b>	<i>Switzerland</i>
2008-2009	<b>Portfolio Management Team – Programme Officer</b> <ul style="list-style-type: none"><li>• Monitored and evaluated 17 grants (US\$ 165 million) in the Middle East and North Africa.</li><li>• Co-managed the signature of 7 new grants; assessed work plans and budgets,</li></ul>	

# KRYSTEL TERZIS

Email: krystel.terzis@gmail.com

Nationalities: Greek and Lebanese

reviewed legal documentation and ensured with M&E specialists that performance indicators are well set.

- Reviewed quarterly progress reports to advise on disbursement decisions (US\$ 50 million).
- Conducted on-site visits to monitor projects and participated in negotiations.
- Developed detailed and regular information profiles for internal and external use.

2006 – 2008

## **Portfolio Partnerships and Risk Management – Programme Officer**

- Developed financial models to manage a portfolio of 484 grants (US\$ 8.4 billion).
- Engaged regularly with regional portfolio teams to identify and mitigate risks.
- Delivered portfolio updates to senior management, board of directors and strategic partners.
- Actively participated in cross-functional taskforce to streamline disbursement process; as a result, transaction costs were reduced by 50%

2004 – 2006

## **Information Management Team – Application Developer**

- Improved efficiency and flexibility of financial reporting by migrating to SQL and business intelligence solutions.
- Developed user interfaces and data extraction queries.
- Conducted business analysis of grant management processes.

## TEACHING EXPERIENCE

Sep 2012 - 2021

**AMERICAN UNIVERSITY OF BEIRUT, Olayan School of Business**

*Lebanon*

### **Part-time Faculty Member**

- Delivered Finance and Decision-Making courses to junior and senior students both online and in-person.
- Elaborated slides and handouts to present the material in a practical way, while including the foundations required in economics and statistical methodologies.
- Designed and Conducted “Career Workshops” to advise students on their professional development.
- Conducted Business Plan Writing Workshops and organized a competition.
- Mentored students before and during their internships to ensure that they get the most from their experience.

2015 – 2016

**INSTITUTE FOR FINANCIAL ANALYSTS (IFA)**

*Lebanon*

### **Instructor**

- Trained graduate students and young professionals on the Quantitative Methods modules (Levels I and II) of the CFA exam.
- Conducted special intensive training on quantitative methods for smaller groups.

## LANGUAGES AND INTERESTS

### **Languages**

Fluent in English, French and Arabic.

### **Interests**

Cooking, Baking, Urbanism, Artificial intelligence to enhance user experience, Pilates, Swimming, Scuba Diving, Neuroscience, Psychology.

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, Real Estate & Finance, May 2022

New York, NY

2020 – 2022

*Leadership:* Co-President of the Real Estate Association, VP of Events for Jewish Business Students Association, Social Chair for Cluster H (Student Government), Admissions Ambassador for Hermes Society, Career Management Center Fellow

*Club Membership:* Private Equity Club, Social Enterprise Club, Wine Society, Sailing Club

*Case Competitions:* Kellogg Real Estate Conference & Venture Competition, 2<sup>nd</sup> Place Team

### NEW YORK UNIVERSITY

**BA**, Economics & Business Studies, May 2014

New York, NY

2010 – 2014

*GPA:* 3.5/4.0

*Leadership:* VP of NYU Transfer Student Association, International Ambassador for NYU Senator's Council, Career Advisor

*Study Abroad:* Architecture and Economics at NYU in Florence, Villa La Pietra, Florence, Italy (Spring 2013)

## EXPERIENCE

### CIM GROUP

Los Angeles, CA

**Summer Associate Vice President, Investments**

2021

- Managed and executed all aspects of the investment process including market research, underwriting, preparing Investment Committee memos, collaborating with internal partners, and liaising with outside parties
- Direct transaction experience included the acquisition of a 165k square foot value-add office park in London, the disposition of a 600k square foot trophy office building in Oakland, a 600-unit single family build to rent development in Orlando, a bridge loan on a 1m square foot mixed-use building in Minneapolis, and a battery energy storage project in Ontario

### JPMORGAN CHASE & CO

Boston, MA & New York, NY

**Executive Director & Client Manager, Commercial Real Estate** (2017 – 2020)

2014 – 2020

- Led group's Boston office overseeing a portfolio with a \$1.4B capitalization, closed over 200 transactions with volume of \$650M, and managed the relationships of 150 clients consisting of real estate investors, family offices, developers & funds
- Achieved perennial record loan production and ranked in top quartile in country; grew loan portfolio over 90% in 4 years
- Sourced new business, negotiated deal terms, managed a 4-person deal team, engaged with local media, partnered with colleagues across business lines, senior management, credit executives, and others to drive results for the business
- Spearheaded relaunch of bank's Fannie Mae program by executing first such deal in the country in over 10 years; collaborated with 15 other employees across business functions
- Co-Chaired firm's largest business resource group that provides leadership development for early career professionals, guided a team of 12, worked directly with members of firm's Operating Committee and increased membership by 50% to 25K in 2 years
- Earned fast-track promotion from Analyst to Executive Director in slightly over 3 years, becoming one of the youngest employees at the firm to earn this title

**Vice President, Commercial Real Estate** (2017)

- Originated over 25 transactions with volume of \$100M in new commercial loans to the bank, including largest transaction to ever fund in Boston, a \$45M refinance of 10 buildings
- Managed a 2-person deal team and executed on a range of business development activities bringing in in top-tier real estate investors as clients to the bank
- Launched multifaceted marketing and media campaign to expand Chase brand awareness and position the business as a preeminent multifamily lender in the market

**Associate, Commercial Real Estate** (2015 – 2017)

- Commissioned by senior management to expand the group's regional footprint by relocating to Boston and executing on a business development strategy, building out a team, and implementing a marketing plan
- Took on an active role with the firm's talent recruitment initiatives; sourced 3 new hires to fill key roles for the group's sales team and served as representative for the CRE business for the firm's New York University on-campus recruitment efforts

## ADDITIONAL INFORMATION

*Certifications:* Certificate in Hotel Real Estate Investments & Asset Management (Cornell School of Hotel Administration; Issued Spring 2020)

*Skills & Trainings:* Argus Enterprise

*Languages:* Russian (fluent)

*Interests:* Hotels (TWA Hotel), competitive running (Ragnar Relay), and entrepreneurship (co-founded food vendor business that served traditional Russian dumplings with American inspired toppings)

**EDUCATION****COLUMBIA BUSINESS SCHOOL****Master of Business Administration (MBA)**, Meyer Feldberg Scholarship RecipientNew York City, US  
2021 – 2023**THE HONG KONG POLYTECHNIC UNIVERSITY****Bachelor of Building Engineering and Management**, VP of Student Union, Chairman of Student ChoirHong Kong, China  
2011 - 2015**QUEENSLAND UNIVERSITY OF TECHNOLOGY****Student Exchange Program**, International Student AmbassadorBrisbane, Australia  
2014 - 2014**EXPERIENCE****GOLDMAN SACHS****Senior Associate, Asset Management Private (formerly known as Principal Investment Area)**Shanghai, China  
Jun 2019 – Aug 2021

- Real estate/infrastructure acquisition and asset management; participated in acquisitions of various asset classes including commercial real estate, internet data center, renewable energy across capital structure from equity to credit; deployed more than USD 500mm capital; managed portfolio assets across China with a total value of c. USD 2bn. Selected deals include:
  - Innov. USD 280mm exit of a business park in Shanghai*: led design and property management team to complete building renovation on time and on budget, increasing rent by 30% to USD 30/sqm/month and occupancy to 95% within 6 months post renovation; led the divestment process from sale side agent selection to SPA negotiation, completing the exit within 4 months from term-sheet signing to deal closing amid a softening market in Shanghai
  - Neo I, USD 300mm hold co. notes and warrants*: evaluated a Chinese logistic real estate developer with 4 million sqm logistics assets co-founded by Warburg Pincus and the founder of ESR; worked closely with GS senior leadership on structuring key terms, including LTV and key covenants; designed warrant subscription price adjustment mechanism in variance issuance scenarios; monitored company performance post deal closing by analyzing borrower's financials and interviewing its management frequently
  - Neo II, USD 200mm equity investments in logistic facility development JVs across China*: led commercial and technical due diligence and financial modeling for 3 logistics development opportunity; negotiated key JV governance terms and formed annual business plans with counterparty's c-suites; led conversation for USD 200mm project financing with lenders and lawyers; managed project delivery from construction completion to leasing; successfully entered into a forward purchase agreement with China's largest insurance company with a 18 months holding period, generating 22% IRR

**POLY REAL ESTATE***The 5<sup>th</sup> Largest Real Estate Developer in China*

Hong Kong, China

**Senior Manager, Outbound Investment**

Aug 2018 – May 2019

- Spearheaded overseas expansion initiatives for China's 5th largest real estate developer; developed and maintained relationship with major market players in London's property market, sourcing more than 20 off-market investment opportunities

**NAN FUNG GROUP***One of the largest private conglomerates in Hong Kong*

Hong Kong, China

**Associate, International Real Estate**

Aug 2015 – Jul 2018

- Evaluated and executed real estate opportunities across key international gateway cities. Selected deals include:
  - George, GBP 300mm equity investment in an estate consisting of 14 office buildings*: conducted thorough market analysis for the target submarket around the King's Cross Station in London; interviewed various creative design, architecture, and F&B companies to form revitalization plans for the target assets; participated in strategizing the NAV adjustment negotiations
  - Endurance, platform acquisition of a UK developer*: performed company valuation using comparables, DCF and SOTP approaches; worked closely with the senior management on merger clauses, including key man structure, incentive scheme and post-merger integration and strategy formation

**ADDITIONAL INFORMATION***Certifications*: CFA Level II candidate*Languages*: Mandarin Chinese (native), English (fluent), Cantonese Chinese (fluent)*Interests*: Aikido, Free Diving, Tennis, Snowboarding, Meditation

**DePaul University**  
**Kellstadt Graduate School of Business**

- Mathew Chen
- Nicole Paige
- Cody Powell

# MATHEW A. CHEN

215 West Washington Street (Apt. 2207), Chicago, IL 60606  
Mathewchen2@gmail.com +1 (312) 468-5721

## Education

### DEPAUL UNIVERSITY – KELLSTADT GRADUATE SCHOOL OF BUSINESS

CHICAGO, IL

*Master of Science (MS) in Real Estate Candidate*

Sep 2021 – Jun 2023E

- Received \$5,000 (Dean's Scholarship) and \$27,000 (Graduate Assistant) in scholarship money for tuition and expenses

### MCGILL UNIVERSITY

MONTREAL, QC

*Bachelor of Arts (BA) in Economics, Minor in Commerce, Major GPA: 3.45*

Sep 2012 – Jun 2017

- Coursework: Money and Banking (A-), Econometrics (A-), Microeconomic and Macroeconomic Theory (A)

### FUDAN UNIVERSITY SCHOOL OF MANAGEMENT

SHANGHAI, CHINA

- International Scholarship recipient (\$3,000); 10-week academic student exchange

Jun 2014 – Aug 2014

## Selected Work Experience

### DEPAUL UNIVERSITY – KELLSTADT GRADUATE SCHOOL OF BUSINESS

CHICAGO, IL

*Graduate Assistant (Department of Finance & Real Estate)*

Sep 2021 - Current

- Selected to work alongside the Department Chair (Thomas Berry) during the 2021-2022 academic year

### BANCORP FINANCIAL SERVICES INC.

VANCOUVER, BC

*Senior Analyst, Real Estate Debt Fund (Senior and Mezzanine Debt)*

Sep 2019 – May 2021

- Involved in loan origination, deal structuring, and relationship management with mortgage brokers and real estate developers covering debt financing opportunities for multifamily and commercial developments across Western Canada
- Monitored and forecasted current and future cash flows for two private debt funds totaling \$350M in aggregate
- Oversaw quarterly investment reporting and commentary covering 40+ active debt financings for 100+ investors

*Investment Analyst, Real Estate Debt Fund (Senior and Mezzanine Debt)*

Mar 2018 – Sep 2019

- Evaluated debt financing opportunities upwards of \$65M for 50+ multifamily and commercial developments across Western Canada; prepared pitch books for executive management and syndicate investors to make investment decisions
- Managed market research data covering residential and commercial value metrics across 15 municipalities across the Greater Vancouver areas to inform executive management and investors of current market fundamentals
- Drafted and reviewed Offering Memorandums (OM), Letters of Intent (LOI), Commitment Letters, and various Inter-Lender Agreements; vetted third-party project reports for accuracy and completeness leading up to deal closing
- Conducted site visits and in-person meetings with brokers and developers covering sites in the Greater Vancouver areas

### MCGILL UNIVERSITY: DEPARTMENT OF ECONOMICS

MONTREAL, QC

*Teaching Assistant (Part-Time), ECON 223 (Political Economy of Trade Policy)*

Jan 2017 – May 2017

- Supported Department of Economics professor and graduate TA in preparing weekly class lecture material for 75 students; assembled PowerPoint presentations and answered student inquiries throughout the Winter 2017 semester

*Undergraduate Research Assistant (Public Sector Economics)*

Sep 2016 – May 2017

- Selected by Department of Economics professor to work alongside 2 graduate students on a preliminary research paper; collected and analyzed historical data on average household income and income taxes in Canada over a 30-year period

### ITOCHU INTERNATIONAL INC.

NEW YORK CITY, NY

*Summer Analyst, Corporate Finance and Accounting*

May 2016 – Aug 2016

- Completed financial statement analysis and prepared investment reports tracking subsidiary performance across the firm's Consumer and General Products portfolio totaling \$1Bn in North America in Q1 FY2017
- Prepared weekly notes and briefings on subsidiary performance over conference calls for senior management

## Additional Information

- Experience with Bloomberg Terminal, SAP ERP and Oracle HFM; completed Wall Street Prep courses (Multifamily Real Estate Modeling, LP Waterfall Structures, and Financial Statement Modeling)
- Long-time suffering fan of the Las Vegas Raiders (NFL), and advocate to bring an NBA franchise back to Vancouver

# NICOLE PAIGE LAM

2045 North Kedzie Ave, Chicago IL 60647 | Phone: (917) 734-8146 | Email: njlam9@gmail.com

## EDUCATION

	Year
<b>DePaul University</b> , Chicago, IL	Present
• Master's of Science in Real Estate Candidate	
<b>University of Pennsylvania</b> , Philadelphia, PA	2015
• Bachelor of Arts, <i>Magna Cum Laude</i> , Philosophy, Politics & Economics (PPE), GPA: 3.66	
<b>University of New South Wales</b> , Sydney, Australia, Junior Year Study Abroad	2014
<b>The Brearley School</b> , New York, NY	2011

## WORK EXPERIENCE

<b>CUSHMAN &amp; WAKEFIELD</b> , Chicago, IL	
<i>Senior Associate, Asset Management</i>	2021-Present
• Responsible for providing strategic direction and maximizing of property performance for a portfolio of real estate assets	
• Partner with third-party leasing teams to develop marketing strategies and lead tenant lease negotiations	
• Prepare excel-based financial analyses for various lease scenarios to support leasing recommendations	
• Update internal Argus models and perform valuation analyses, including hold/sell analyses and capital budgeting analyses	
• Produce quarterly investor reports to provide ownership with status on property operations	
• Assist in acquisition due diligence and subsequent closing for properties being purchased by clients	
<b>SILVERSTEIN PROPERTIES, INC.</b> , New York, NY	
<i>Associate, Acquisitions and Development</i>	2019-2021
• Focus on acquisition, investment, and development for Silverstein Properties, a privately held vertically integrated NYC-based developer best known for developing and rebuilding the World Trade Center site	
• Create excel-based acquisition and development models, revenue and expense projections, and other analyses across condo, office, residential rental and retail projects, including return on investment modeling, complex joint venture partnership structures, market analysis, lease analysis, feasibility, budget creation and project scope	
• Coordinate asset dispositions, transaction financing, and asset refinancing alongside external investment sales and debt teams	
• Assist in capital raising including deal-specific equity, programmatic joint-venture equity, and life science fund capital raising	
• Assist principals in creating and presenting investment committee memorandums for Investment Committee approval	
• Member of the Silverstein Properties Diversity and Inclusion Committee	
<b>LASALLE INVESTMENT MANAGEMENT</b> , Chicago, IL	2016-2019
<i>Senior Analyst, Strategic Investments Group</i>	
• Evaluate and execute real estate co-investment transactions on behalf of institutional separate account clients	
• Support team members in market research, data analysis, and due diligence of market information and comparable transactions	
• Prepare Investment Committee presentations based on internal underwriting, market analysis, risks and mitigants	
• Maintain portfolio level models and evaluate investment performance and returns	
• Produce quarterly reports for investors on asset level and portfolio level performance and returns	
• Perform complex financial analyses, including Excel-based pro formas and cash flow projections	
• Selected to record minutes at weekly North American Investment Committee meetings	
<b>GOLDMAN SACHS</b> , Chicago, IL	2015-2016
<i>Analyst, Asset Management</i>	
• Analyze mutual fund sales activity and produce weekly performance and insights reports for senior management	
• Provide competitive analysis reports on advantages of Goldman funds and ETFs vs. competitor funds for end-client use	
• Support regional salespeople by updating and maintaining Salesforce data	
• Present ETF and mutual fund pitches to sales desk and management	

## ACTIVITIES / LEADERSHIP

<b>Urban Land Institute (ULI)</b>	2019-Present
• Women's Leadership Initiative (WLI) Scholarship Committee Member – Events Committee	
<b>SEO – Sponsors for Educational Opportunity</b>	2020
• Industry Specialist (Wealth Management) – Provide ongoing career and interview support for high achieving college students from underrepresented communities for entrance into wealth management internship and analyst programs	
<b>One Million Degrees</b>	2017-Present
• Coach – Partner with community college students to help set and achieve academic and professional goals	

**Skills:** Excel, Financial Modeling, Lease Analysis, Argus Enterprise & DCF, PowerPoint, CoStar, RCA, Kardin, Yardi, VTS

**Other Interests:** Live Music, Violin, Trying New Restaurants, Cooking, Reading, Gardening, Traveling



# Cody M. Powell

## CONTACT

powellcastle@me.com



512-966-6968



1020 Randolph St., Unit 3W,  
Oak Park, IL 60302



## ACADEMICS

### Master of Science in Real Estate

DePaul University

2020 - 2022

(Evening Program)

### Bachelors of FCS

### Majoring in Interior Design

Texas State University

2016 - 2019

(Full Time while working)

Full Time professionally)

## HONORS

### NAIOP Chicago:

University Scholarship

2021

### REIA Chicago:

Winter Quarter Scholarship

2021

### CoreNet Chicago Chapter:

University Scholarship

2021

### Douglas Crocker Endowed

Scholarship

2020

### IIDA Texas / Oklahoma Chapter

Tuition Reimbursement Scholarship

2019

### A4LE Southern Region:

Otto D. Grove Scholarship

2016

### Boy Scouts of America:

Eagle Scout Rank

2012

## HARD SKILLS

**Excel** Expert

**Revit** Expert

**InDesign** Expert

**STDB** Expert

**Visio** Expert

**Argus** Proficient

**CoStar** Proficient

**MS Projects** Proficient

**AutoCAD** Proficient

## SOFT SKILLS

### Financial/Project Management:

Financial Modeling, Financial Analysis, Argus Modeling/Analysis, DCF Analysis, Project Scheduling, Project Budgeting, RE Transaction Structures, Investment Analysis

### Architectural:

Architectural Drawings/Analysis, BIM Modeling, Historic Preservation, Site Analysis, MEP Analysis/Drawings, Building Condition Surveying, Technical Detailing

## EXPERIENCE

2020 - Present

Full Time

### Associate Relocation Project Manager | JLL

Working with the directors of the Relocation PM team to develop and implement new processes, conduct daily audits in the facility management system, and ensuring KPI compliance. Working throughout the Bank portfolio to optimize outcomes for the associates and overall client alike.

**Client:** Bank of America

**Position Location:** Chicago, IL

2019 - 2020

Full Time

### Intermediate Tech. Designer | IA Interior Architects

Leading a small team to complete a large number of account TI projects on time and under budget, in a time sensitive manner involving complicated jurisdictions while managing client expectations and meetings on a weekly basis.

**Clients:** Humana (SC / TX), RSM (Chicago, IL / MN)

**Position Location:** Chicago, IL

2016 - 2019

Full Time

### Design Professional | CTA Group

Working on large scale commercial corporate TI projects. This role had me completing contract documents and following them through the construction administration process to completion.

**Clients:** Google (Austin, TX / Mountain view, CA), Apple (Austin, TX), Dell (Austin, TX / New York, NY)

**Position Location:** Austin, TX

2015 - 2016

Full Time

### Architectural Intern | Pfluger Architects

**Position Location:** Austin, TX

2013 - 2015

Part Time

### Student Intern | Huckabee Architects

**Position Location:** Austin, TX

## ORGANIZATIONS

REIA Chicago | 2020 - Present

NAIOP Chicago | 2020 - Present

International Interior Design Association | Member #1088752 | 2017 - Present

USGBC – LEED AP ID+C | GBCI #11060738 | 2016 - Present

## Harvard Business School

- Aaron Hancock
- Martin Pawlik

# T. Aaron Hancock

ahancock@mba2022.hbs.edu

| 2022 HBS Mail Center, 700 Soldiers Field Road, Boston, MA 02163

| 704.254.7502 (Cell)

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## PROFESSIONAL EXPERIENCE

### HANCOCK GROUP CONSULTING, LLC

Washington, DC

*Manager*

June 2019 – Present

- Real estate advisory firm which provides strategic advice, implementation services, and education to private and public corporate entities

#### Selected Client Experience

*Wall Street Prep – Director of Real Estate Programs*

- Developed [20-hour online self-study real estate financial modeling course](#) to be sold to individuals, corporate clients, and university clients
- Oversee strategic direction of real estate vertical, to include identifying new business lines, development of new content, instructor hiring and training, and in-person content delivery
- Teach real estate financial modeling to corporate and university clients including top banks, private equity firms, and MBA programs

*Trident Holdings – Underwriting, Capital Raising, and Project Management*

- Develop 20-year investment proforma utilizing third-party market report, engineer ROM costs, and draft master plan for ~\$1.5B, 1,200-unit, 2,000-acre resort-oriented second home development in McCall, ID
- Coordinate construction of [100-page presentation](#) outlining the project's land use plan, conservation objectives, community engagement strategy, and economic analysis which was presented to state-level senior leadership
- Manage 7-person team consisting of master planners, design architects, engineers, and conservation experts

*JBG SMITH – Smart City Initiative, Transactions Lead*

- Provide transactional support to include analyses for potential partnerships, reviewing legal agreements, and underwriting
- Execute a strategic initiative to deliver a first-of-its-kind urban digital infrastructure topology consisting of dark fiber, edge data centers, outdoor small cells, indoor distributed antenna systems, and CBRS spectrum
- Negotiated and drafted LOI with AT&T to deliver the [US' first 5G Smart City at scale in National Landing](#) (Washington, DC) by deploying the most robust network infrastructure in any urban environment in the USA

### ARTEMIS REAL ESTATE PARTNERS

Washington, DC

*Senior Associate, Acquisitions & Asset Management*

June 2016 – July 2019

- Co-led investment of over \$375M of equity (~\$1.5B of real estate value) across 25 transactions
- Led acquisitions process including communication with joint venture partners and other market participants, debt procurement, market analysis, coordination of third-party reports, and review of legal and physical due diligence
- Underwrote and executed transactions across value-add, opportunistic, and core-plus investment strategies in office, industrial, retail, multi-family, healthcare, hotel, subordinated debt, and ground-up development asset classes
- Supported establishment of the [PREA SEO Real Estate Track](#) with the goal of advancing industry-wide diversity and inclusion by spearheading initial idea generation, participating in fundraising of a \$11.5M+ endowment on behalf of the PREA Foundation, and continuing to support annual classes of 50+ underrepresented students through active participation in educational events

### MORGAN STANLEY

New York, NY

*Analyst, Investment Banking Division, Real Estate Group*

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## EDUCATION

### HARVARD BUSINESS SCHOOL

Boston, MA

*Candidate for Master's in Business Administration*

August 2019 – May 2022

- Elected Student Association Senator (1 of 10)
- Selected to Dean's Anti-Racism Taskforce (1 of 5)
- Clubs: African American Student Union (Co-President), Real Estate (Co-Chair Real Estate Venture Capital Competition)

### THE DYSON SCHOOL, CORNELL UNIVERSITY

Ithaca, NY

*B.S. Applied Economics & Management, Concentrations in Finance & Real Estate*

- Elected President of Alpha Phi Alpha Fraternity, Inc.
- Member: Varsity Football – Cornerback, Student Assembly Finance Commission, Delta Sigma Pi Professional Fraternity

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## LEADERSHIP, COMMUNITY & INTERESTS

- **Affiliations:** Seizing Every Opportunity (SEO), Management Leadership for Tomorrow (MLT), Robert Toigo Foundation, Alpha Phi Alpha Fraternity, Inc., Delta Sigma Pi Professional Business Fraternity
- **Personal:** Interested in solving issues related to equity and access at the educational and professional level. Enjoy football and fantasy novels.

**MARTIN PAWLIK**  
210 Lafayette  
New York, NY 10012  
mpawlik@mba2022.hbs.edu  
(847) 997-1163

**education**

- 2019-Current **HARVARD BUSINESS SCHOOL** **BOSTON, MA**  
Candidate for Master in Business Administration, May 2022. First Year Honors for academic achievement. President: Real Estate club. Admissions officer.
- 2008-2012 **WASHINGTON UNIVERSITY IN ST. LOUIS** **ST. LOUIS, MO**  
Bachelor of Science degree, major in Finance and minors in French and Accounting. Graduated *summa cum laude* (4.0 GPA) and valedictorian for the Class of 2012. Completed language immersion programs in France as well as a business trek in Israel.

**experience**

- Current **GORDON ROAD CAPITAL** **NEW YORK, NY**  
**Co-Founder**  
Investment firm back by several family offices with a mandate to invest equity in single-family-rental (SFR) developments in the Southeast.
- Responsible for sourcing new opportunities and identifying local partners to execute on development opportunities.
  - Current pipeline of ~800 total residential units, including over 300 townhomes, located in North and South Carolina at a total capitalization of over \$200 million.
  - Responsible for all aspects of the deal process including sourcing, underwriting, and asset management.
  - Strategically meeting with other family offices and institutional capital partners to fund future deals beyond current pipeline.
- Current **NEW YORK UNIVERSITY** **NEW YORK, NY**  
**Adjunct Professor**  
Adjunct professor for NYU's undergraduate and Master's programs. Responsible for teaching (i) *Real Estate Investing in a Distressed Environment* (ii) *Real Estate Finance & Investment Analysis* and (iii) *Real Estate Valuation*.
- 2016-2019 **DRAKE REAL ESTATE PARTNERS** **NEW YORK, NY**  
**Vice President – Real Estate Acquisitions**  
Sourced, underwrote, and closed on half of the investments for Fund III to date, a \$300 million equity fund with approximately \$1 billion in purchasing power. Conduct due diligence for prospective investments including: property financials, market information, industry trends, partner track record, investment execution feasibility, legal issues, insurance policies and environmental impact. Representative transactions (personally sourced, underwrote, and closed):
- Acquisition and renovation of a boutique mixed use building in the Jackson Square neighborhood of San Francisco, CA; this was the first investment for Fund III and first investment in San Francisco for Drake.
  - Ground-up development of two senior housing projects in Augusta and Savannah, GA; these were Drake's first senior housing investments, and since then, have led to a programmatic relationship with the operating partner.
  - Acquisition and renovation of a 186-unit multifamily campus in the suburban Chicago location of Glendale Heights, IL; the business plan was to renovate and bring the units to a market standard.
  - Consolidation and renovation of a 719-unit fractured condominium project in the suburban Chicago location of Palatine, IL; the acquisition is the largest condominium deconversion in the State of Illinois' history.
- 2013-2016 **CANYON PARTNERS** **LOS ANGELES, CA**  
**Associate – Real Estate Acquisitions**  
Oversaw all underwriting (including Argus) and due diligence efforts for the Southwestern region in the United States. Closed and underwrote over \$500 million in investments (highest associate closing rate) across all asset types for both debt and equity capital. Representative transaction:
- Underwrote and closed on the first mezzanine loan from Canyon's flagship debt vehicle for the development of a ground-up retail lifestyle center in Southern California.
- 2012-2013 **J.P. MORGAN** **NEW YORK, NY**  
**Analyst – Real Estate & Lodging Investment Banking**  
Built analytical models including three-statement, LBO, accretion / dilution, and various debt and equity transactions for real estate coverage clients.

**personal**

Fluent in Polish and proficient in French. Enjoy Barry's, CrossFit, cooking, and international politics.

## **MIT (Massachusetts Institute of Technology)**

- Gregory Bonomo
- Teo Nicolais
- Corazon Wamakima
- Yue Zhao

# Gregory Paul Bonomo

55 Station Landing Unit 515W Medford, MA 02155 | 518-813-0364 | gbonomo@mit.edu

## **FULL-TIME WORK EXPERIENCE**

### **TA Realty**

Associate

Boston, MA

March 2016-August 2021

- As the only Associate on the Disposition Team, I have worked on the preparation, negotiation and closing of 150 commercial real estate sale transactions valued in excess of \$8.1B.
  - Transactions to date total 52MM square feet of real estate as well as 6,700 multifamily units; 27MM square feet of industrial, 9MM square feet of office, 9MM square feet of industrial/office flex, 5MM square feet of land and 2MM square feet of retail
- Performed hold sell analysis, at the portfolio and property levels, throughout TA Realty's Value-Add, Core and Separate Account portfolios
- Assessed the optimal hold or sell strategy for individual assets or portfolios of assets to maximize risk adjusted returns and sale proceeds for the eventual distribution of funds to TA Realty's Limited Partners
- Strategized with investment sales teams from across the country to refine and implement a customized marketing strategy for each disposition
- Compiled data-driven market reports to further support a hold or sell recommendation using a variety of research and data compilation tools
- Presented completed disposition presentations directly to the Investment Committee, which included built and maintained Argus and Excel models as well as detailed market and property valuation metrics
- Managed the full marketing process, after an approved disposition presentation, from the initial launch into the market to the eventual closing
- Qualified potential buyers through a rigorous buyer interview process to ensure the highest quality execution for each individual transaction
- Negotiated and structured Purchase and Sale Agreements with selected buyers to clearly define each party's obligations for a transaction
- Provided detailed marketing updates on a deal's status to the Investment Committee, Portfolio Managers and directly to TA Realty's clients
- Notable disposition transactions while at TA Realty included:
  - \$1.04B distribution and logistics portfolio that totaled 8MM square feet of industrial space located across 14 markets
    - 96 individual assets with a total of 325 tenants which sold to two institutional buyers, Blackstone and AEW
  - \$854MM office and industrial portfolio totaling 9MM square feet of space across 45 assets which sold to Brookfield Property Group
  - \$430MM multifamily portfolio totaling 2,500 units across six assets and 66,000 square feet of retail space which sold to Blackstone
  - \$418MM 40-story Class A Boston office tower totaling 570,000 square feet, which at 95% occupied, sold to Heitman's HART Fund
  - \$201MM regional industrial portfolio totaling 3MM square feet across 20 assets located throughout the Mid-Atlantic region
  - \$181MM Whole Foods anchored lifestyle retail center, redeveloped and managed by TA Realty for over 20 years
    - 530,000 square foot center leased to 109 tenants which sold to WS Development and Cross Harbor Capital

### **UC Funds**

Asset Management Analyst

Boston, MA

April 2015-March 2016

- Asset managed a real estate debt portfolio collateralized by a variety of assets across all property types and valued in excess of \$100MM
  - Portfolios were comprised of first mortgage bridge loans, adaptive re-use bridge loans, mezzanine loans, and preferred equity
- Oversaw the development of properties in several phases of the development cycle including ground-up, heavy renovation and stabilization

Underwriting Analyst

May 2013-April 2015

- Performed detailed due diligence and financial analyses, including IRR and ROI scenario analysis, on over \$1.0B of short-term debt and equity investments across all asset classes and located in secondary and tertiary markets throughout the United States

## **EDUCATION / LICENSES / APPOINTMENTS**

### **Graduate**

**Massachusetts Institute of Technology (current):** Pursuing a Master of Science in Real Estate Development (MSRED)

### **Undergraduate**

**Bentley University (2009-2013):** Waltham, MA

**GPA:** 3.54

**Honors:** President's List, Dean's List

**Double Major:** Corporate Finance / American History and Politics

**Universidad Pontifica Comillas (2011):** Madrid, Spain

**GPA:** 3.66

**Honors:** President's List

**Real Estate Related Coursework:** Boston University's Center for Professional Education

- Real Estate 106: Overview of the Real Estate Development Process – 4.0 GPA
- Real Estate 123: Physical Evaluation of Real Estate Assets – 4.0 GPA

**Licenses:** Real Estate Salesperson

**Associations:** Real Estate Finance Association

**Appointments:** Justice of the Peace - Massachusetts

## **VOLUNTEER EXPERIENCE:**

- Served on the Charity Committee at TA Realty, which is intended to grow the social impact of the organization and its employees individually
  - Organized events and raised money for the Greater Boston Food Bank, Thompson Island Outward Bound and United Way
- Guest speaker and active alumni participant at Career Services and Bentley Real Estate Group events over the last seven years
  - Facilitated informal small group meetings, career and industry presentations, individual student outreach programs and represented the commercial real estate industry in the Career Conversations event at Bentley University for three consecutive years

## **PERSONAL REAL ESTATE INVESTMENT EXPERIENCE:**

- Own and operate a small investment property portfolio consisting of two 3-bedroom condominium units located in Boston, Massachusetts
- Board of Trustee member for two condo associations and perform property management, accounting and budgeting responsibilities

Real estate business owner with **16 years** of experience in real estate finance, investment, and entrepreneurship. Eleven years of experience running my own real estate investment company. **Actively seeking partners and advisory board members for investing in workforce housing properties in non-coastal U.S. markets.**

## Experience

- Jan 2010 - Present** **President, Nicolais, LLC** *Denver, CO*
- Acquired, renovated, and managed a small portfolio of apartment properties metro Denver.
  - Engaged in fix-and-flips, typically acquired through short sales and foreclosure auctions.
- Jan 2015 - Present** **Instructor, Harvard Extension School** *Cambridge, MA*
- Developed and taught three courses: *Principles of Real Estate* (20 semesters), *Real Estate Finance and Investment* (17 semesters), and *Real Estate Enterprise Management* (5 semesters).
  - Topics covered: Economics of land use, property and neighborhood life cycles, real estate market cycles, financial pro forma and investment analysis, raising capital with debt and equity partnerships, entrepreneurship, construction management, strategic growth strategies, and negotiation.
- Jun 2013 - Present** **Real Estate Expert Witness / Subject Matter Expert** *Denver, CO*
- Expert Witness for **Federal Trade Commission** on real estate matters.
  - Harvard Business School Online** Subject Matter Expert for real estate.
  - Subject Matter Expert in a dispute on a \$150 million capital restructuring for a mixed-use real estate development.
  - Testimony: Colorado State Senate (Affordable Housing, Rent Control, Landlord-Tenant Laws), City of Wheat Ridge, Colorado (Urban Revitalization Policy), City of Westminster, Colorado (Landlord-Tenant Law).
- July 2007 - Jan 2010** **Director of Finance and Acquisitions, Cunat, Inc.** *McHenry, IL*
- Financed over \$300 million loans for apartment investment projects.
  - Acquired over 1,200 apartments for a value-add portfolio** in three states (Illinois, Iowa, and Tennessee).
  - Evaluated and monitored new markets throughout the Midwest.
  - Personally identified acquisition targets, negotiated purchase agreements, performed financial and physical due diligence, secured financing, and developed repositioning strategies for new acquisition and renovation projects.**
  - Financing arranged: taxable and tax-exempt bonds, tax-increment financing, HUD 223(f) Loans, institutional debt, and conventional bank debt.

## Industry Leadership Roles

2021- Board Member	Harvard Alumni Real Estate Board (Cambridge, MA)
2018-19 Vice President	Apartment Association of Metro Denver (AAMD), Denver, CO (Second Term)
2017-19 Member	Colorado Apartment Association (CAA) Board of Directors, Denver, CO
2019-20 Chair	AAMD & CAA Joint Legislative Advisory Council, Denver, CO
2017-18 Chair	Independent Rental Owners Council, AAMD (Second Term)

## Personal Info

### Address

100 Landsdowne Street, 1209  
Cambridge, MA 02138

### Phone

(720) 261-5895

### E-mail

tnicolais@fas.harvard.edu

## Harvard Teaching

### Courses Taught:

Real Estate Courses	43
Finance & Econ Courses	49

### Students Taught:

2006—present	13,533
Real Estate Courses	5,252
Currently teaching 4th largest course at Harvard Extension School for Fall 2021 (out of 486 courses)	

### Student Evaluations:

Instructor Rating	5.0 / 5.0
Principles of RE	4.9 / 5.0
RE Finance & Inv.	5.0 / 5.0
RE Enterprise Mgmt	4.7 / 5.0

# CORAZON WAMAKIMA, CAPM

## EDUCATION

### MASSACHUSETTS INSTITUTE OF TECHNOLOGY

BOSTON, MA

*Master of Science, Real Estate Development*

Anticipated Date: May 2022

- Theodore S. Bacon, Jr. Fellow, CRE Diversity Fellow and the Blake Eagle Fellow

### RUTGERS UNIVERSITY

NEWARK, NJ

*Bachelors of Arts, Accounting*

2011

## PROFESSIONAL EXPERIENCE

### WANJIKU RE LLC

NEW YORK, NY

#### ***SENIOR FINANCE MODELING SPECIALIST***

*2018 - CURRENT*

- Perform underwriting analysis for \$20M worth of real estate assets (affordable housing in Atlanta).
- Evaluated Qualified Opportunity Zone (QOZ) financial models to eliminate investors' capital gains tax through Federal Opportunity Zones credit.

### PRICEWATERHOUSECOOPERS LLC

NEW YORK, NY

#### ***SENIOR TAX ASSOCIATE***

*2014 - 2016*

- Supervised the review of more than 300+ separate state returns with shared service centers in India achieving year over year efficiency of 20%.
- Spearheaded various projects providing income tax expertise to internal and external clients.
  - *Industries:* Investment Management, Asset Management, Real Estate, CIPS TICE.
  - *Specialities:* International Tax Planning, SALT, Tax Technology, Management Advisory, SOX Controls, Process Management and Business Development.
- Honorably selected to represent the largest market, NY Market, in the National Tax Advisory, a committee of senior executive tax leaders and staff representatives.

#### ***TAX ASSOCIATE***

*2012 - 2014*

- Analyzed qualitative and quantitative accounting data for income tax implications to produce
  - interim and annual financial statements (US GAAP and IFRS) and
  - US (federal and state) tax returns and K-1 (investor) package
- Analyzed the income tax impact on significant transfer pricing transactions totaling \$300M USD and built financial valuation models.
- Troubleshooted tax return preparation software issues and earned the title, 'Tech expert'.
  - *Technology:* OneSource (expert), CorpTax (Proficient)

## ADDITIONAL INFORMATION

**Licenses and Certifications:** NYS Licensed Real Estate Agent; Certified Associate in Project Management (CAPM); various courses in Construction Management (NYC Small Business Solutions and City Tech Continuing Studies)

**Languages:** Swahili (fluent), French (conversational)

**Interests:** biking, swimming and playing tennis



# Yue Zhao (Mia)

myuezhao@mit.edu +1 (206) 670 6222

## Professional

### Mia Wealth International

Sydney, Australia

#### Founder and Manager

Dec. 2013 – Present

- Physical Property: Identified the booming suburbs and specific properties with growth potential, purchasing block of units (20,000 sq ft) and 2 retail spaces (5,000 sq ft) across Sydney and Brisbane; coordinate with vendors to maintain properties
- Property Fund: Analysed performance report and market conditions across sectors worldwide to invest in property funds such as Colonial Firstchoice and Blackstone, and securities such as Lendlease; portfolio has a five-year annualised return of ~20%
- Mezzanine loan to developers and home buyers around Sydney area (\$5M AUM, 50% LVR, 12% Average Interest)

### BNP Paribas

Sydney, Australia

#### Managed Fund Analyst

May 2018 – Aug. 2019

- In a team of 17 in the Private Equity Real Estate and Unlisted Unit Trust team, provided custodian and fund operation services to Australian pension fund, with \$300B under custodian for this sector
- Liaised with 6 fund managers and internal offshore cash team for daily operation; convinced senior management to develop automated Excel modules with VBA to increase the trading efficiency for cash forecast system inter-company and inter-desk transactions reconciliation by 30%
- Trained and supervised 10 interns and new hires

### Sun Property Group Australia

Sydney, Australia

#### Assistant Development Manager

Feb. 2017 – Feb. 2018

- Conducted research of land due diligence and created feasibility studies for commercial and residential sites; identified an undervalued site that generated \$2M profit for the company
- Liaised with councils, architects and builders to ensure 7 projects worth \$1B are delivered successfully; convinced brands including Mercedes Benz and luxury furniture chain Coco Republic to be partners
- Actively communicated with agents, marketing and sales team to boost sales by 20% (\$3M) for a project

## Education

### Massachusetts Institute of Technology

Boston, the US

#### Master of Science in Real Estate Development

Sep. 2020 – Current

- Real Estate Finance and Investment
- Real Estate Ventures I: Negotiating Development-Phase Agreements

### The University of Sydney

Sydney, Australia

#### Bachelor of Economics (Economics and Finance)

July 2013 – May 2016

- High Distinction (A+): Mathematical Finance, Business & Economics Statistics, Corporate Finance
- London School of Economics and Political Science (LSE) Exchange Program (London, UK)

### Elite Education Institute

Sydney, Australia

#### Professional Accounting Program

March 2016 – July 2016

- Key Subjects: Management Accounting, Advanced Financial Accounting, Accounting Theory, Business Law
- External Auditor recognized by Chartered Accountants (CA) Australia

## Additional

### Volunteer Work

- 40K Globle - Worked in at a team of 6 in a rural village in Bangalore, India; implemented a handcrafted cufflink factory to utilize local mineral materials and empowered 20 local women to make a sustainable living

### Professional Designations and Certificates

- Data Science Certificate (General Assembly) Feb. 2019
  - Machine Learning, Statistics Model, Decision Tree, Regression Model, Data Mining, Data Visualization
  - Final Project: Melbourne property market analysis with 10,000 datasets scrapped online
- UDIA Real Estate Development Certificate Aug. 2017
  - Feasibility Study, DA Approval, Marketing & Sales, Project Management
- Argus Estate Master Certificate of Accreditation Aug. 2017
- Property Certificate of Registration April 2014

### Language

Professional Translator (English to Chinese)

Jan. 2017

## **New York University & New York University Schack Institute of Real Estate**

- Browning Altizer
- Joshua Bakst
- Roy Chahroun
- Anthony Chammah
- Nicholas Prunier
- Charles Thau

# Browning Altizer

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## SUMMARY

Fueled by ideas, innovation, and meaningful connection with others, I pride myself on being multi-faceted (people-oriented yet highly analytical) and driving results in fast-paced, high-pressure scenarios. My background in office tenant representation brokerage has given me years of experience working closely with c-suite executives, honing my communication skills and managing deadlines. I am a quick learner and have a deep interest in the business of real estate. I seek to constantly exceed performance objectives.

## EXPERIENCE

### Cushman & Wakefield, Associate

Denver, CO

*Global leader in commercial real estate services (NYSE: CWK)*

*August 2018 – November 2020*

- Worked closely with c-suite executives on assignments related to their company's real estate needs (focused on users of corporate office space). Fully licensed to buy, sell, lease real estate in the state of Colorado.
- Served as a member of a high-performing, top-100-ranked team working with local, regional, and national organizations including Facebook, Comcast, WeWork, iHeartRadio, TaxGuard, etc.
- Orchestrated initial meetings with prospective clients, led in the formation of each pitch, prepared meeting materials.
- Performed financial analyses of client's existing lease documents, amendments, etc. to present for client review.
- Further analyzed client's existing lease documents to gain an understanding of present circumstances, rights, opportunities, etc.
- Submitted RFPs and negotiated deal terms with landlord's brokers to achieve client satisfaction on future lease terms.
- Led business development efforts for my team and generated \$1.55M in pending gross commissions (per pending deals list).
- Highly motivated self-starter. Spent evenings and weekends listening to podcasts, reading books, researching best practices to foster professional development.
- Demonstrated consistent success in meeting/exceeding new client acquisition targets set by team's senior partners.

### Cushman & Wakefield, Analyst

- Conducted extensive economic analysis on Denver's commercial real estate market, contributing to the company's publicly circulated quarterly reports.
- Assisted brokers with market research including demographic analyses, historical real estate trends, statistics, forecasting, etc.
- With my team of four, maintained the office's internal database of all local commercial leasing/sales activity.

### Cresa, Advisor

Charlotte, NC

*World's largest tenant rep only commercial real estate firm*

*August 2017 – July 2018*

- Worked closely with c-suite executives on all matters related to their company's real estate needs (focused on users of corporate office space).
- Beginning with no clients, generated 17 in-process transactions in 9 months' time.
- Developed strong sales skills (cold calling, cold emailing) and a self-starter mindset.

## EDUCATION

### New York University, Schack Institute of Real Estate

New York, NY

*Masters in Real Estate (Finance & Investment Concentration)*

*2021 - Present*

- Won a highly coveted spot in the Hirsh Fellows program as one of only 15 students selected from hundreds of applicants.
- The program prepares students for management and executive positions in the real estate industry.

### Sewanee—The University of the South

Sewanee, TN

*Bachelor of Arts degree received May 2016*

*2012 - 2016*

- Major in Economics and minor in Business (Finance); GPA: 3.47; graduated *cum laude*.
- Member of men's varsity lacrosse team (goalie), directly contributing to four consecutive NCAA Tournament berths.

### London School of Economics

London, UK

- Principles of Accounting (AF110). Preparing and analyzing financial statements of business entities.

*Summer 2014*

## ACTIVITIES

### Impact Denver Leadership Foundation, Class of 2021

Denver, CO

- Worked with a team of five Denver young professionals to consult a local non-profit group.
- Engaged in challenging conversations around topics like race, age, diversity, etc. to foster personal and professional growth.

*2020 - February 2021*

### CityLive (Downtown Denver Partnership), Committee Member

Denver, CO

- Invited to serve on the committee alongside ten other local professionals of various ages/backgrounds working towards the goal of making downtown Denver a safe, exciting, inspiring place to live and work.

*2019 - 2021*

## OTHER

**Interests:** emerging technologies, wilderness backpacking, fly fishing, sustainability, design, fitness, football

# JOSHUA BAKST

600 W. 58<sup>th</sup> St, NY, NY, 10019 | (561) 901-0401 | [joshbakst@gmail.com](mailto:joshbakst@gmail.com)

## EDUCATION

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### NYU Schack Institute of Real Estate

*Master of Science, Real Estate Finance*

- Cumulative GPA: 3.875/4.0

**New York, NY**

*Expected Graduation May 2022*

### Yeshiva University, Sy Syms School of Business

*Bachelor of Science, Finance and Business Administration*

- Dean's List

**New York, NY**

*August 2017-January 2021*

*2019-2021*

## WORK EXPERIENCE

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### Intern

*Stoeber Glass Wealth Management*

- Worked with Bloomberg Terminals to extrapolate pricing data of stocks and bonds for client positions
- Applied Microsoft Excel skills in order to maintain and organize clientele data
- Regularly attended meetings with real estate development firms to discuss potential investment for future projects
- Routinely surfed public records to further analyze securities for potential investment

**Boca Raton, FL**

*Summer 2019*

### Summer Analyst

*Banyan Commercial Capital, LLC*

- Interned in financial analysis and infrastructure development
- Helped in managing customer relations management database (CRM) to target potential clients
- Had direct contact with clients and financial institutions to expedite transactions towards finality
- Applied relevant Microsoft Excel programming while assisting in the underwriting process of deals

**Boca Raton, FL**

*Summer 2018*

### Social Media Manager

*Blazing Fast Media, LLC*

- Helped in creating and marketing a value proposition to intrigue potential clientele
- Created Instagram ads and weekly reports on web traffic and ROI
- Identified, developed, and evaluated marketing strategies based on knowledge of company objective and market trends

**Boca Raton, FL**

*April 2017-January 2018*

## LEADERSHIP & VOLUNTEER EXPERIENCE

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### Tamid Group

*Select Member*

- Gained exposure to the Israeli economy through market research, case studies, and analysis
- Participated in Start-up pitches further expanding my entrepreneurship and teamwork skills

**New York, NY**

*October 2018-2020*

### Investment Club at Yeshiva University

*Member*

- Participated in stock market competitions with 80+ students on campus and placed in the top 10%
- Participated in a curriculum that includes a variety of topics such as valuation methods, stages of financing, and basic accounting and term sheets

**New York, NY**

*Fall 2017 – May 2020*

### Entrepreneurship Society

*Member*

**New York, NY**

*September 2018-2020*

### Ethics Society

*Member*

**New York, NY**

*September 2018-2020*

### Kol HaNearim

*Volunteer*

**Bnei Brak, Israel**

*Summer 2016-2017*

- Volunteered in a specialized program to integrate with Israeli children who had either personally witnessed or were directly involved in the fall out of some form of domestic abuse
- My role as a counselor was to engage, talk, and listen to the children throughout the planned daily activities where I provided support and interaction to help them deal with their trauma

## SKILLS & INTERESTS

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**Computer:** Advanced Microsoft Excel including pivot tables and chart structures, Power Point, Microsoft Word, Photoshop, Social Media, Research tools such as Bloomberg

**Languages:** Conversational Hebrew

**Interests:** Travelling, Volunteering, Scrabble, Backgammon, Tennis, Books, Classic Rock

# Roy Chahrouri

(514) 589-8009 | roy.chahrouri@gmail.com | New York, NY

## EDUCATION

<b>New York University, Schack Institute of Real Estate</b> – MS in Real Estate, Concentration in Finance and Investment	2021 - 2022
<ul style="list-style-type: none"><li><b>Hirsh Fellows Program:</b> One of 10 graduate students selected from the MSRE Program for a highly specialized one-year academic experience, preparing students for management and executive positions in the real estate industry</li></ul>	
<b>Concordia University, John Molson School of Business</b> – BComm, Major in Finance and Minor in Real Estate Cumulative GPA: 3.81	2017 - 2020
<ul style="list-style-type: none"><li><b>Honours:</b> Recognized in the top 15 percent of the commerce program by the Golden Key International Honor Society</li></ul>	
<b>Marianopolis College</b> – Commerce Degree (DEC)	2015 - 2017
<b>Selwyn House School</b> – Secondary School Diploma, with honours	2003 - 2015

## PROFESSIONAL EXPERIENCE

<b>Real Estate Investment Banking Analyst – CMLS Financial (Montreal)</b>	Oct. 2020 – June 2021
<ul style="list-style-type: none"><li>Performed financial modeling and created marketing material for debt &amp; equity financing across various commercial asset classes and portfolio transactions in the Eastern Canadian market</li><li>Provided recommendations for credit structuring and advised on strategic capital raising and fund structures tailored to the client's track record and objectives, including institutional investors, family offices, high-net-worth individuals, REITs, and private equity firms</li><li>Conducted market research by gathering sales and rental comparables for property benchmarking and synthesized market analysis reports for valuation, industry analysis, negotiations support and various other applications</li></ul>	
<b>Investments and Asset Management Summer Analyst – Ivanhoe Cambridge (Montreal)</b>	Summer 2020
<ul style="list-style-type: none"><li>Validated property valuation models from our general partners by generating ARGUS cash flow projections, adjusted for more conservative assumptions, for industrial assets situated across various major markets in North America</li><li>Supported the team with underwriting potential acquisition transactions that we received from our network within the industry, as well as assisted in the financial analysis for a CAD\$400M portfolio disposition based on the conclusion of a 5-year fund term</li><li>Submitted and presented a whitepaper with recommendations to executive management based on the analysis of investment opportunities that I identified in the self-storage and hospital sector</li></ul>	
<b>Investments &amp; Loans Summer Analyst – Groupe Mach (Montreal)</b>	Summer 2019
<ul style="list-style-type: none"><li>Assembled documents required for loan approval by working with the internal financial, development, environmental, and legal teams and personally negotiated with banks to secure the most favorable rates and terms</li><li>Performed the financial underwriting for construction and term debt for various assets, including the acquisition financing for a retail site in Sherbrooke valued at over CAD\$230 million, which required extensive rent roll and expense analyses</li><li>Compiled a database of the properties under management with the purpose of calculating the leverage and coverage ratios of the portfolio in order to inform executive decisions</li></ul>	
<b>Transformation Summer Analyst – Nokia (Munich)</b>	Summer 2017 & 2018
<ul style="list-style-type: none"><li>Helped develop and maintain a risk management model for an IT consolidation program, which resulted in savings of US\$1.1 billion from efficiencies with telecommunication equipment suppliers</li><li>Analyzed large volumes of customer satisfaction surveys and proposed strategies to improve responses based on identified trends</li></ul>	

## LEADERSHIP & VOLUNTEERING

<b>Member of the Finance and Investment Committee, REISA – Schack Institute of Real Estate</b>	Aug. 2021 - Present
<ul style="list-style-type: none"><li>Supporting students with their job search and providing opportunities through the organizing of networking events and fireside chats with real estate finance professionals</li></ul>	
<b>Mentor – LIFE</b>	Sept. 2020 - Present
<ul style="list-style-type: none"><li>Helping young professionals develop their personal and professional skills needed for success by offering advice on development opportunities and career paths, and assistance with job and internship search in finance</li></ul>	
<b>Founder of Big Brother Association – John Molson School of Business</b>	Dec. 2019 - May 2020
<ul style="list-style-type: none"><li>Big Brother is a career and academic student mentorship program through which graduating students assist other students in establishing career objectives and recommend valuable resources in achieving these</li></ul>	
<b>Real Estate Modeling Tutor – John Molson School of Business</b>	Sept. 2019 - May 2020
<ul style="list-style-type: none"><li>Tutored undergraduate students and members of the Concordia Real Estate Club in topics covering real estate development and acquisition modeling, valuation, waterfall returns, and in-depth case studies for various commercial real estate properties</li></ul>	
<b>Varsity Basketball and Soccer Team Captain – Selwyn House School</b>	Aug. 2013 - June 2015
<ul style="list-style-type: none"><li>Awarded MVP of Varsity Basketball and Soccer team</li></ul>	

## SKILLS & INTERESTS

**Technical Skills:** Advanced Excel proficiency in financial modelling, PowerPoint, FactSet, CoStar, Capital IQ, Bloomberg, Rockport VAL

**Certifications:** AMF Licensed Mortgage Broker, ARGUS Software, Wall Street Prep Financial and Valuation Modeling, Breaking Into Wall Street Real Estate & REIT Modeling, Bloomberg Market Concepts, CAIA Level 1 in progress

**Languages:** Fluent in English and French

**Interests:** Piano composition, guitar, basketball, competitive chess, sailing regattas, travelling

# ANTHONY A. CHAMMAH

121 Reade Street, New York, NY 10013 · (646) 335-2552 · Chammah.Anthony@gmail.com

## EDUCATION

**New York University, Schack Institute of Real Estate:** New York, NY  
*M.S. Degree in Real Estate Finance and Investments (Current GPA 3.7)*

Jan 2021 – *Expected Graduation May 2022*

**Duke University:** Durham, NC

June 2016

*B.A. Degree in History with a Double Minor in Political Science and Sociology*

## EXPERIENCE

**Crow Holdings Capital:** New York, NY

September 2021 – Present

*Associate – Investor Coverage*

- Responsible for assisting in investor coverage for both existing and new Limited Partners of all Crow Holdings fund vehicles, focusing on the North America and European regions
- Produce materials for the execution of fundraising initiatives as it relates to fund vehicle updates, market dynamics, Limited Partner requests, etc.

**Crow Holdings Capital:** Dallas, TX

June 2021 – August 2021

*Summer Associate*

- Responsible for creating the due diligence materials for a potential new investment vehicle for Crow Holdings, including analysis of the asset class's strategic positioning, market dynamics, competitive landscape and fund structure / terms
- Assisting the Crow Holdings Corporate Development team in the underwriting and analysis of a portfolio valuation and syndication by determining property-level projected returns and valuation / sale premium spreads
- Aided the Corporate Development team with the creation of portfolio models as well as analyzing and creating fund level asset roll ups

**Colliers International:** Dallas, TX

Jan 2018 – Oct 2020

*Tenant Representation Associate*

- Managed a national account consisting of over 300,000 square feet and 280 medical office locations – tasked with market analysis, underwriting, and managing lease negotiations throughout the United States
- Underwrote the acquisition of the Capital Club Building including analysis of the capital stack and assisted in the fundraising of \$2,500,000 capital commitments to facilitate the transaction
- Transacted on over \$30 million in lease extensions, renewals, and relocations over the span of three years
- Founded the Colliers Future Leaders program that is dedicated to the continued development of its members' industry related knowledge-base, technical skills, and encouraging collaboration amongst employees

**Younger Partners:** Dallas, TX

May 2017 - Jan 2018

*Tenant Representation Associate*

- Oversaw Younger Partners' office tenant representation initiative in the Dallas / Fort Worth market, which includes responsibilities spanning prospecting and outreach, lease developments, as well as tenant relocation, expansion and consolidation
- Sourced, underwrote and closed two commercial deals in first three months of tenant representation – Quality Care Nursing Home Health and Neema's Wraps

**Younger Partners:** Dallas, TX

June 2016 - May 2017

*Real Estate Analyst*

- Produced customized pitch materials consisting of personalized property analytics including but not limited to historical occupancy, lease absorption, market rate comparison and lease rate projections
- Created Younger Partners' market analysis report by analyzing data for the entire Dallas / Fort Worth metroplex, which identified market trends in Class A, B, C office buildings and were used for both new business and update pitch materials

## CERTIFICATES

- A.CRE Accelerator Certificate of Completion – Consisted of 16 case-based real estate financial modeling and analysis courses
- REFM Certification in Excel for Real Estate Financial Modeling – Level 1, Level 2, Level 3

## LEADERSHIP & ACTIVITIES

**Salvation Army Echelon:** Dallas, TX

May 2017 – Sept 2020

*Vice President of Corporate Fundraising*

- Echelon seeks to mobilize the next generation of young professionals for the Salvation Army by providing opportunities for young adults to engage with the organization through networking, donations and fundraising, and service and volunteering

## SKILLS

Computer: Microsoft Office Word, Microsoft Office Excel, Financial Analysis, Underwriting, CSS, HTML, PowerPoint, ProCalc

# Nicholas Prunier

New York, NY

(508)-873-5131

Prunes11@gmail.com

## EDUCATION

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### **New York University - Expected Graduation Spring 2022**

MS Real Estate Development

Concentration in Global Real Estate Development

GPA: 3.76

### **Boston University**

BS in Business Management

Concentration in International Business

## PROFESSIONAL EXPERIENCE

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### **Mercer Street Partners**

#### **Summer Associate**

New York, NY

May 2021 -August 2021

While a Summer Associate at Mercer Street Partners, a private real estate investment company, I had the opportunity to work across asset management and acquisitions teams while managing the re-development of a legacy property into an upscale resort getaway in the Catskills region of New York. I was tasked with over-sight of Mercer's Portfolio cap-ex projects consisting largely of 100+ unit multi-family properties as well as a rapidly expanding social club and co-working startup located in Richmond, Virginia. In addition to the project management component, I assisted in the due diligence of potential acquisitions as well as market research for both multi-family as well as hospitality assets and expansion opportunities in key growth markets. Working under the Director of Asset Management I also reviewed portfolio financial statements, market rental analysis, and weekly as well as quarterly portfolio asset management reports.

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### **Slate Property Group**

#### **Assistant Project Manager - Development**

New York, NY

August 2019 – April 2020

My role as Assistant Project Manager on Slate Property Group's development team was multi-faceted and built on my previous experiences in project management, only at a larger scale physically and financially. My responsibilities consisted of oversight of the various project's design teams including MEP, Structural Engineers, Architects and Interior Designers as well as AV/ Security, Lighting and Elevator Consultants, General Contractors and more specifically quality control, permitting, project reporting budget and schedule administration. I also served as ownership's primary day to day representative in the field on multiple projects concurrently while coordinating with asset management, marketing and capital partners to ensure the development strategy was being executed in accordance to the business plan. My role also necessitated immense daily interaction with property management and leasing to ensure efficient unit turnover and coordination with construction teams in two nearly fully occupied 360+ unit buildings.

## **Nicholas Prunier**

New York, NY

(508)-873-5131

Prunes11@gmail.com

### **Projects – Value-Add Repositioning**

- Manhattan - The Oriana \$100mm – Luxury Residential Reposition of 364 units - 420 East 54<sup>th</sup> Street. Oversaw completion of the final 15 units, Hardscape, Contractor Closeout, TCO Closeout
  - Manhattan - The Biltmore \$40mm – Luxury Residential Modernization of 371 Units 271 W 47<sup>th</sup> Street. Oversaw completion of the Lobby, Elevator modernization, 70 luxury apartment renovations, Amenity Floor, Outdoor terrace, Arcade
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The COAST Group

### **Project Manager – Development**

New York, NY

November 2017 to October 2018

As a Project Manager for the COAST group, a Development Management and Construction Management company, I participated early in the development process on the owner's behalf. My role commenced during or shortly after property acquisition and assisted the owner's in the due diligence process as well as finding their property's highest and best use in a market. Additionally, I would assemble the development team to which I would oversee on the owner's behalf including the architect, primary engineers, various consultants, and legal teams needed to see the project through filing and thereafter.

### **Projects - Pre-Development**

- Bronx - Lot Subdivision – 30 Unit Market Rate Apartment Building - \$20mm Ground-Up Development
  - Bronx - Lot Subdivision - 80 Units Affordable Independent Senior Housing Building - \$30mm LIHTC Ground-Up Development
  - Bronx - Charter School / Retail Conversion from Manufacturing Use - \$10mm Re-Development
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The Renatus Group

### **Asset Management Associate**

New York, NY

December 2013 to March 2017

As an Asset Management Associate at the Renatus Group, a privately held real estate investment company, I was involved in all stages of construction and development as well as assisting in the asset management of the current portfolio of properties under ownership and due diligence for potential acquisitions. In addition to The Renatus Group's projects we served as the Development Manager for various High-Net-worth clients as well as a multi-billion-dollar retail REIT. My responsibilities ranged from managing the construction contract process, project financial reports and project management including oversight of the design team, GC's, quality control, Permitting, Financial Requisitions, Change orders, Schedule, and on-site supervision.

### **Projects – Development & Value-Add Repositioning**

- Manhattan – 210 Bowery - 8 Unit Luxury Condo with Retail – \$26mm Ground-up Development
- Manhattan – 145 East 57<sup>th</sup> Street - 13<sup>th</sup> Floor Commercial Office Penthouse Addition, Lobby Retrofit and Elevator Modernization - \$10mm Value- Add



# **Nicholas Prunier**

New York, NY

(508)-873-5131

Prunes11@gmail.com

- Manhattan – 55-57 Spring Street, 152-154 7<sup>th</sup> Avenue, 203 West 19<sup>th</sup> Street - 40 Unit Apartment & Lobby Portfolio Renovation – \$4mm Value-Add
- Manhattan – 4-16 West 125<sup>th</sup> Street - Commercial Office & Retail Renovation / Tenant Improvement - \$1mm Value-Add

## **AFFILIATIONS**

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Boston University Men's Soccer, BU Real Estate Students and Alumni

## **SKILLS**

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Microsoft Office, Argus, QuickBooks, Skyline PM, Procore, Yardi

## **PROFESSIONAL AFFILIATIONS**

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Urban Land Institute

## **CONTINUING EDUCATION**

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Real Estate Financial Modeling

Construction Estimating

# Charles Thau

142 East Lane Stamford, CT 06905 | (203)-536-3918 | cthau11@yahoo.com

## Education

### NYU Schack Institute of Real Estate

New York, New York

*Master of Science in Real Estate*

*December 2022*

**GPA:** 3.92/4.00

### Yeshiva University, Sy Syms School of Business

New York, New York

*Bachelor of Science in Finance, Minor in Management*

*May 2020*

## Work Experience

### Antheus Capital – Private real estate acquisition, development and redevelopment company

Englewood, New Jersey

*Acquisition Analyst*

*October 2020– January 2021*

- Constructed financial models, incorporating loan amortization schedules, to compare the financial impact of different loan terms — notably how NOI shifted among the various scenarios considered
- Researched and preformed cost-benefit and financial analyses to determine the viability of renovating certain properties
- Acted as the liaison between Antheus and numerous appraisers and lenders, handling all the documents and communication in order to complete deals in the most efficient manner

### First Manhattan Co. – Portfolio Management Firm with \$23B AUM

New York, New York

*Dedicated Summer Research Analyst*

*June 2019 – August 2019*

- Reviewed annual reports of multiple companies and built financial models to assist in the preparation of market analyses and the valuation of companies in the Industrial and Technology sectors.
- Performed research including macro-economic and industry analysis, market sizing and company due diligence in building discussion materials for various pitches.
- Attended investment, due diligence, and sales meetings with various CEO's of major companies discussing wide ranges of company performances and future strategies and goals.
- Generated peer review reports and competitive analysis on various competing companies in the same sector

### K&R Realty Management – Multi-family residential, condo, co-op, and retail property management company

New York, New York

*Real Estate Development Summer Intern*

*June 2018 – August 2018*

- Reviewed and processed tenant rental applications for low-income housing
- Calculated annual income projections for each applicant
- Met and conducted in-person and phone interviews with numerous applicants

## Extracurricular Activities

### Tutoring

September 2016- August 2021

- NYU Schack students: real estate finance and development process
- Yeshiva University students: mathematics and Judaic Studies
- One-on-one basketball coaching for middle and high school students

### Tamid Group at Yeshiva University

New York, New York

*Assistant Director of Education*

*Fall 2018 – May 2020*

- Provided introduction for members on basic financial statement analysis and on the Israeli business environment
- Participated in weekly entrepreneurship workshops, including competitive investment challenges

### Investment Club at Yeshiva University

New York, New York

*Member*

*Fall 2017 – May 2020*

- Participated in stock market competitions with 80+ students on campus and placed in the top 10%
- Participated in a curriculum that includes a variety of topics such as valuation methods, stages of financing, and basic accounting and term sheets

**Other Activities:** Entrepreneurship Society; Venture Capital and Private Equity Club; Yeshiva University Political Action Club; Captain, Intramural Basketball

## Awards, Interests and Skills

**Awards:** Dean's List 2019-2020 Academic year

**Languages and Skills:** Hebrew (proficient), Microsoft Word, Excel, PowerPoint

**Interests:** Basketball; Hockey; Baseball; Football, Volunteering, Game of Thrones, Entrepreneurship, Skiing, Travel

## **Northwestern University Kellogg School of Management**

- Drew Daniels
- William Edge
- Kyle Graham
- Connor Savage
- Noah Shulruff

# William J. Edge

2645 N Mildred Ave., Unit 3, Chicago, IL 60614  
(217) 370-9071 · [willedge4@gmail.com](mailto:willedge4@gmail.com)

## BUSINESS EXPERIENCE

### Incubation Capital Partners LLC

Chicago, IL

*Vice President (01/2020-present), Senior Associate (01/2019-1/2020), Associate (07/2017-01/2019)*

*July 2017 – Current*

- Merchant bank and placement agent for entrepreneurial real estate investment managers providing strategic capital advisory services, including capital raising, entity and deal-level capital advisory, as well as principal investment into real estate funds and operators
- Advise clients on all aspects of the fundraising process, including structuring, marketing, execution, and preparation of fund marketing materials – instrumental part of the team raising over \$1.5 billion of equity across 11 client mandates since July 2017
- Maintain existing and actively source new institutional investor relationships throughout North America for the firm with approximately 350 active relationships; active Financial Industry Regulatory Authority (“FINRA”) Series 7 and 63 licenses
- Notable accomplishments:
  - Secured nearly \$100 million of capital for two (2) active clients in the last six (6) months (March 2021 – September 2021)
  - Sourced, led, and executed a \$25 million entity-level capital mandate (eventually upsized to \$75 million)
  - Originated a nature-oriented hotel strategy targeting coastal, mountain, and national park markets and successfully identified, partnered, and structured a minority ownership position with an institutional hospitality investment firm to grow the strategy

### Alignium, LLC (fka RVK, Real Estate Consulting Group)

Chicago, IL

*Investment Analyst*

*June 2016 – July 2017*

- Provided real estate investment consulting services to public and private pension plans, endowments, foundations, and family offices by performing manager research globally to identify attractive risk-adjusted returns that meet client objectives
- Assisted in the transition from RVK to Alignium by developing a proprietary performance reporting software that tracked over 100 KPIs and streamlined the quarterly client performance reporting process
- Completed quarterly performance reporting for approximately \$15.5 billion in client AUA
- Acted as the initial manager research relations lead for external investor relations and placement agent personnel

### Institute for International Business

Iowa City, IA

*International Business Consultant – Team Lead*

*August 2015 – December 2015*

- Served as team and client relations lead for a market research initiative for our client, a software engineering firm that created a Printed Circuit Board (“PCB”) design and analysis toolkit, to determine feasibility of entering the Singapore market
- Connected client with Venture Capital firms located in the Singapore market to serve as a potential source of capital and knowledge
- Determined there was significant PCB analysis competition and that the market would likely not sustain a new entrant

### Principal Global Investors

Des Moines, IA

*Portfolio Analyst Intern*

*January 2015 – December 2015*

- Provided portfolio management services for a \$4 billion GAV separate account with a public pension plan client consisting of retail, multifamily, and student housing assets located across the United States with six joint venture partners
- Utilized Argus DCF to assist in the completion of quarterly valuations, drafting quarterly reports, and investment committee sheets

## EDUCATION

### Kellogg School of Management | Northwestern University

Evanston, IL

*MBA Candidate*

*Anticipated Summer 2022*

### University of Iowa

Iowa City, IA

*BBA, Finance*

*May 2016*

- Business Coursework GPA: 3.7; Overall GPA: 3.5
- Clubs & Organizations: Delta Sigma Pi, Tippie Real Estate Club, Tippie Buddies

### University of Iowa Wealth Management Winterim Session

London, UK

*London Study Abroad Program*

*December 2015*

- Selected to take an intensive multi-week wealth management course located in London to learn about international finance
- Shadowed the Principal Global Investors real estate team to learn about European real estate markets and property sectors

### Consortium Institute of Management and Business Administration (CIMBA)

Paderno del Grappa, IT

*Italy Study Abroad Program*

*August 2014 – December 2014*

- Business study abroad program in Northern Italy that included meeting with international business in the region to acquire an overview of Western European business practices
- Awards & Certificates: Leadership Initiative for Excellence (LIFE) Award of Excellence, Kepner-Tregoe (KT) Problem Solving and Decision Making Certification

## NETWORKING & PHILANTHROPY

- Chicago Real Estate Private Equity Network (CREPE) – Active Board Member
  - Manage networking group of over 1,000 real estate professionals from over 200 Chicagoland commercial real estate firms; formed corporate and non-profit (501c6) entities to effectuate tax savings; established annual golf outing with a \$40,000 annual budget
- University of Iowa John Pappajohn Entrepreneurial Center (Iowa JPEC) Mentor Program – Active Mentor
- Lyric Opera of Chicago – Active Contributor
- Golf Digest Course Rating Panelist – Active Member

## KYLE GRAHAM

1890 Maple Ave. Apt. 706E Evanston, IL 60201  
908.334.1644 | kyle.graham@kellogg.northwestern.edu

### EDUCATION

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- 2020 - Present **KELLOGG SCHOOL OF MANAGEMENT & MCCORMICK SCHOOL OF ENGINEERING** Evanston, IL  
**NORTHWESTERN UNIVERSITY**  
*Joint Degree Candidate MBA and MS Design Innovation (MMM), June 2022*
- Major: Finance, Pathway: Real Estate
  - Campus Involvement: Real Estate Club Co-President, Future of Cities Conference Co-Chair, Admissions Interviewer
- 2011 - 2016 **TULANE UNIVERSITY** New Orleans, LA  
*Accelerated Master of Architecture (MArch) Program, Summa Cum Laude*
- Major: Architecture, Minor: Social Innovation and Entrepreneurship
  - Achievements: Thesis Commendation, Top of Architecture Class, Peery Society (Top 1% of Tulane Graduates)

### EXPERIENCE

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- Summer 2021 **CBRE** Seattle, WA  
**MBA Summer Associate – Enterprise, Providence Health Services Account**
- Examined 1.2 million healthcare patient data points to optimize client portfolio, identifying multiple consolidation and acquisition opportunities. Forecasted patient demand to correct supply of future medical clinic space
  - Formulated upgrade plan for medical R&D lab space portfolio. Identified occupancy opportunities; collaborated with brokers to negotiate lease, saving client \$20.2 million & adding 130,000 square feet of medical & lab space
- Spring 2021 **SHERIDAN ROAD REAL ESTATE PARTNERS** (Real Estate Investment Startup focused on Life-Sciences) Evanston, IL  
**Real Estate Investment MBA Intern**
- Developed hypothesis to identify emerging life science clusters. Conducted regression analysis on 14 factors; identified 4 priority markets; synthesized findings in supply/demand report for non-institutional investors.
  - Evaluated project opportunities in office to life science conversions. Built Argus financial projections and waterfall returns for 3 scenarios (roll-to-market, release, and convert to life science) on \$33 million of potential investments
- 2016 - 2020 **ENNEAD ARCHITECTS** New York, NY  
**Project Architect (2018-2020)**
- Led global, collaborative design teams of up to 6 architects and construction specialists in developing Office, Hospitality, and Mixed-Use building projects totaling 4.2 million square feet in the United States and Asia
  - Spearheaded effort to incorporate emerging Smart City technology into project planning, presented findings to client decision-makers and resulted in a 2.9 million square feet, award-winning mixed-use building project
  - Devised plans to achieve project benchmarks and coordinated production of deliverables, engaged with client's senior leadership to present design proposals on projects generating \$8 million in revenue
  - Created custom tools allowing designers to iterate through solutions faster and identify environmental impact. Worked with Python specialists to integrate tools into workflow, increasing iteration speed by 40%
- Senior Designer (2016-2018)**
- Analyzed financial and environmental data to produce cost reduction scheme for building enclosure, reduced cost by 10% while still meeting needs of client and achieving LEED Gold Equivalent rating
  - Prepared architectural drawings, coordinated arrangement of design features with cross-functional teams, and developed shell and enclosure systems for projects totaling 6.8 million square feet

### ADDITIONAL DATA

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- Licensed Architect - Connecticut - ARI.0014001
- 1<sup>st</sup> Place Entry – 2020 University of Texas-McCombs National Real Estate Finance Case Competition
- Led volunteer team of 10 designers, preservationists, and community activists in effort to reopen shuttered NYC Landmarks. Lobbied NYC Dept. of Parks to issue RFP to rehabilitate neglected spaces. Effort featured in NY Times.
- Skills: Excel, Argus, CoStar, Adobe Creative Suite, AutoCAD, Microsoft Office, Python, R Studio
- Interests: Exploring construction sites, authentic Creole cooking, and homebrewing Belgian beers

**CONNOR SAVAGE**

(301) 706-3260 | connor.savage@kellogg.northwestern.edu

**EDUCATION**

2020 - Present	<b>KELLOGG SCHOOL OF MANAGEMENT NORTHWESTERN UNIVERSITY</b> <i>Candidate for Master of Business Administration degree, June 2022; Finance Major</i> <ul style="list-style-type: none"><li>Extracurricular Activities: Vice President of Social for Real Estate Club, Golf Club Executive Committee, University of Texas National Real Estate Challenge Team Member (1<sup>st</sup> Place), Real Estate Lab (Winter 2021 Intern at Pearlmark)</li></ul>	Evanston, IL
2011 - 2015	<b>COLLEGE OF CHARLESTON</b> <i>Bachelor of Science in Finance</i> <ul style="list-style-type: none"><li>GPA: 3.6 major, 3.5 cumulative; Presidential Scholarship Recipient</li><li>Leadership: Investment Society US Equity Markets and Financial Sector Analysts, Sigma Chi Fraternity Recruitment and Derby Days Chairman</li></ul>	Charleston, SC

**EXPERIENCE**

Summer 2021	<b>THE STERLING BAY COMPANIES</b> <i>MBA Summer Intern</i> <ul style="list-style-type: none"><li>Led financial modeling for \$1.9B GAV / 4.6M RSF of acquisition opportunities in life science, residential, creative office, and industrial sectors across national markets resulting in 3 LOI submissions and 1 signed LOI.</li><li>Managed due diligence process for \$576M life science portfolio acquisition in San Diego, CA consisting of 5 stabilized office buildings, 1 value-add repositioning, and 2 development parcels totaling \$1.5B / 1.4M RSF upon completion.</li><li>Developed case studies and presentations to assist in raising of strategic joint venture capital across US markets.</li></ul>	Chicago, IL
2016 - 2020	<b>JBG SMITH</b> <i>Investments Group Associate (Senior Analyst: July 2017 - Dec 2017; Analyst: Jan 2016 - June 2017)</i> <ul style="list-style-type: none"><li>Sourced, evaluated, and structured residential, office, &amp; mixed-use investment opportunities (various risk profiles) throughout the DC Metro Area by working directly with principals and partners.</li><li>Created complex deal-level models to evaluate deal structures, capitalization, cashflow waterfall, promote structures, and exit assumptions for 35 existing investments and over \$6B of potential investments.</li><li>Supervised the firm's only GP relationship, EYA, for whom JBG provided LP equity for \$435M+ development pipeline.</li></ul> <b><i>Selected Transaction Experience</i></b> <u>Project District - Recapitalization of \$8.4B Portfolio and Management Platform via public merger with VNO</u> <ul style="list-style-type: none"><li>Selected to work on small internal team to analyze potential IPO of existing portfolio of 9 private equity funds with over \$2B in AUM and, ultimately, negotiate multibillion-dollar merger with Vornado.</li><li>Built JBGS Corporate model to guide all capital allocation and recycling decisions for 145-asset portfolio.</li><li>Created a template model, managed the process, and provided assumptions to full Analyst team to underwrite all 65 of Vornado's contributed real estate assets to combined company with an aggregate value of \$6.1B.</li></ul> <u>Robinson Terminal South - \$191M mixed-use acquisition, recapitalization, and development</u> <ul style="list-style-type: none"><li>Coordinated initial acquisition and secondary joint venue marketing and negotiation of mixed-use development consisting of 70 condos, 26 townhomes and 11,000 SF of retail.</li><li>Wrote comprehensive investment memorandum highlighting underwriting, risk factors and mitigants, market analysis, and promoted joint venture to receive IC approval to acquire and recapitalize investment.</li></ul> <u>Health and Human Services Building - \$436M commercial office disposition in Rockville, MD</u> <ul style="list-style-type: none"><li>Ran sale process of 1,330,000 SF GSA-leased Trophy Office building in Rockville, MD through broker selection, offering materials drafting, buyer selection, purchase agreement negotiation, and due diligence.</li><li>Sold asset for \$436M, largest sale price for a single-asset real estate transaction in Washington, D.C. area in 2019.</li></ul> <u>Parkstone Alexandria - \$106M multifamily acquisition and mezzanine loan in Alexandria, VA</u> <ul style="list-style-type: none"><li>Invested first dollars within a newly raised \$100M mezzanine loan fund to lend bridge financing to Washington, D.C.</li><li>Managed underwriting, investment memo drafting, document negotiation, and due diligence to lend \$15M in mezzanine financing for Arlington Housing Development Corporation's acquisition of a 326- unit multifamily building.</li></ul>	Bethesda, MD
2015	<b>THE PALMETTO GROUP</b> <i>Capital Markets Analyst (Intern: Dec 2014 – Jun 2015)</i> <ul style="list-style-type: none"><li>Prepared financial models and led due diligence for \$45M of single-family rentals and renewable energy investments.</li></ul>	Charleston, SC

**ADDITIONAL**

- Technical Skills: Argus (DCF and Enterprise), CoStar, Microsoft Suite (advanced including VBA), Yardi
- Interests: Golfing, Skiing, Scuba Diving, Washington, D.C. Professional Sports

## NOAH SHULRUFF

1881 Oak Ave #1208W Evanston, IL 60201

(847) 271-0600 | noah.shulruff@kellogg.northwestern.edu

### EDUCATION

2021 - Present	<b>KELLOGG SCHOOL OF MANAGEMENT NORTHWESTERN UNIVERSITY</b> <i>Candidate for Master of Business Administration degree, June 2023</i> <ul style="list-style-type: none"><li>• Majors: Real Estate and Finance</li><li>• Member: Kellogg Real Estate Club, Hispanic Management Association</li></ul>	Evanston, IL
2012 - 2016	<b>UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN</b> <i>Bachelor of Science and Bachelor of Arts</i> <ul style="list-style-type: none"><li>• Majors: Finance and Spanish   GPA: 3.63</li><li>• Internships: Ernst &amp; Young and Edward Jones</li></ul>	Champaign, IL

### EXPERIENCE

2020 - 2021	<b>TORBURN PARTNERS</b> <i>Real Estate Associate</i> <ul style="list-style-type: none"><li>• Underwrote and sourced industrial, retail, multi-family, and mixed-use properties, leading to acquisitions equaling \$30M+</li><li>• Analyzed new development opportunities using excel pro forma, determining land and property value based on submarket, rents, budget, cap rates, and other key criteria resulting in new developments totaling ~350K SF</li><li>• Led project management workstream containing accounting, construction, and architecture workstreams to revamp internal construction draw procedures to improve process efficiency by ~40%</li></ul>	Northbrook, IL
2017 - Present	<b>BERKSHIRE HATHAWAY HOMESERVICES CHICAGO</b> <i>Realtor [Part-Time]</i> <ul style="list-style-type: none"><li>• Closed 17 transactions while working full-time by underwriting properties with financial models to aid client decision making for properties worth over \$2M total</li><li>• Manage vendors including attorneys, brokers, and lenders to facilitate smooth closings in under 40 days</li></ul>	Chicago, IL
2016 - 2020	<b>DELOITTE CONSULTING</b> <i>Consultant, 2018 - 2020</i> <ul style="list-style-type: none"><li>• Led real estate due diligence visits with real estate developers, negotiated financial terms, and provided financial analysis to assist client with location strategy and site selection for a 500K SF distribution center</li><li>• Formed COVID-19 response strategy for a Fortune 100 company, reducing real estate costs by ~\$20M</li><li>• Delivered effective leadership and guidance to four analysts to create an assessment of the US real estate technology landscape, leading to two new vendor partnerships for the Deloitte Real Estate practice</li><li>• Organized networking events including a Hispanic Heritage Month potluck, yoga classes, and bachata dance lessons to foster an inclusive community as Deloitte Chicago Hispanic Network VP</li></ul> <i>Business Technology Analyst, 2016 - 2018</i> <ul style="list-style-type: none"><li>• Ran project management efforts including creating a project plan, tracking task completion status, and reviewing project budget for multiple ERP implementation projects totaling over \$10M in revenue</li><li>• Managed a team of eight developers by leveraging Spanish skills to complete performance testing on-time and on-budget for SAP implementation in Honduras, Costa Rica, and Nicaragua, leading to an additional \$5M contract for Deloitte</li><li>• Trained 120 global users on functionality improvements from SAP upgrade implementation, leading to two personal applause awards for outstanding client service, equating to \$1,000 in personal bonuses</li></ul>	Chicago, IL

### ADDITIONAL DATA

- Community Involvement: Organized a well-being fair for underprivileged women at the Young Women's Leadership Charter School of Chicago by teaching students about physical, mental, and nutritional well-being
- Other Interests & Activities: Teaching yoga, drawing, national parks, and fantasy football
- Languages: Spanish (business level proficient), English (native)
- Certifications: Illinois Real Estate Broker, Certified Yoga Instructor, SAP ERP 6.0 - Financial Accounting

## **Roosevelt University**

- Angela Azmitia
- Roxanne Garcia
- Lisa Munoz
- Patrick Sinwelski



**Angela Maria Azmitia**  
Chicago, IL  
813.951.0637  
aazmitia4990@gmail.com

## EXPERIENCE

APR 2018 - *Current*

**Related Companies** - Chicago, IL

Leasing Consultant | CHA Coordinator

- Develop and oversee implementation of Organizational Practices and Procedures as it relates to Affordable Applicant Processing and General Office Management
- Oversee Office Compliance in accordance with Chicago Housing Authorities (CHA)
- Maintain positive Resident Relations by providing excellent Customer Service
- Organization of Resident and Affordable Housing Data through OneSite and Yardi Systems
- Management of long and short term projects (as directed)
- Bridge cross-functional gaps through collaboration with the Design Team, Affordable Leasing, Market Rate Leasing, General Management, and Operations Management
- Oversee Leasing and Annual Renewals

AUG 2016 - JUNE 2020

**The School of the Art Institute of Chicago** - Chicago, IL

Teaching Faculty: ACE | Youth Outreach

Graduate Office Assistant

- Filing and Organizational Maintenance
- Monthly presentations utilizing PowerPoint, Photoshop, Illustrator, and Excel
- Oversaw Student Studio Compliance
- Completed long-term projects unsupervised and on-time
- Develop lesson plans in compliance with SAIC Guidelines, and for designated curriculum, including (*but not limited to*): Painting, Drawing, Printmaking, Fashion Illustration, Graphic Illustration, Comics & Graphic Novels, Critical Theory
- Lecturer and Instructor for designated class(es)
- Oversee Student Development, Research, and Organization
- Coordinating Educational Excursions
- Educator for Homan Square Workshop(s)

MAY 2014 - JULY 2016

**COACH, Inc.** - Tampa, FL

Assistant Manager

Senior Selling Specialist

- Clienteling
- Oversaw 12 Employees (training to company standard)
- Overseer of Clienttrack and ROI (Return on Investments)
- Developed and Maintained excellent customer relationships through branded client relations: "Modern Luxury Embracement"
- Display merchandise in accordance to visual directives
- Maintained organization of stockroom and relayed store transfers

MAY 2014 - FEB 2015

**BCBGMAXAZRIA** - Tampa, FL

Shop Manager

- Scheduled to Store Matrix
- Fostered positive customer relations through product knowledge and clienteling
- prepared weekly paperwork to be send to corporate
- Scheduled company outreaches
- Display merchandise in accordance to visual directives
- Maintained organization of stockroom and relayed store transfers

**References Available Upon Request**

## EDUCATION

Masters of Science in Real Estate (MSRE)  
Roosevelt University (RU)

Chicago, IL

**Fall 2022 Projected**

Masters in Fine Art (MFA), Printmedia  
The School of the Art Institute of Chicago  
(SAIC)

Chicago, IL

**2018**

B.F.A., Art Studio | Art History  
University of South Florida  
Tampa, FL

**2013**

## SKILLS

Critical Thinking  
Creativity  
Research  
Problem-Solving  
Data Arrangement  
Organization  
Communication  
Clientele Management

## SOFTWARE

MS Excel (Advanced)  
Mac Systems  
Microsoft Suite  
OneSite Mgmt.  
Yardi Systems

## HONORS & AWARDS

**2021**

- Goldie Scholar Recipient
- NAIOP Chicago University Scholar
- Hipolito Roldan Scholarship for Tomorrow's Hispanic Leaders in Real Estate (RU)

**2018**

- AICAD Teaching Fellowship Nominee (SAIC)

**2015**

- Merit Scholarship (SAIC)

**2013**

- OUR Excellence in Research Award (USF)

# Roxanne Garcia



773-704-3346



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[www.linkedin.com/in/roxanne-garcia/](http://www.linkedin.com/in/roxanne-garcia/)

## Education

### Roosevelt University - Current '21 - Dec '22

- Current Student in the Master of Science of Real Estate (MSRE)

### University of Wisconsin-Milwaukee - Aug '14 - May '18

- Bachelor of Science of Architectural Studies with minor in Multimedia Art

## Professional Experience

### Chicago Architecture Center - Chicago, IL - June '21 - Current

#### Program Director + Architectural Instructor - Part Time

- Managed monthly events, planned guest speakers and created communities revolving the design world.
- Coordinated exhibitions at the Chicago Architecture Center, communicated Architectural language and drawings.
- Create daily lessons plans with Harold Washington College and instructing an Architectural Drawing and Design Thinking Course to 20 students.

### McBride Kelley Baurer Architects/Planners - Chicago, IL - Sept '18 - Current

#### Architectural Designer + Project Manager - Full Time

- Provided project management skills by organizing construction budgets, project programming and maintaining intensive milestones for 35+ projects. Specialized in Affordable Housing, Community Centers, Churches, and Homeless Shelters.
- Established strategic partnerships with non-profit clients and neighboring community members across Chicago. Lead and actively participated in community meetings that produced problemsolving solutions in environmental design.
- Produced roughly 100 proposals, 3-5 daily design drawings and 30 exhibition renderings across the life-cycle of a project using Revit, Adobe Suite and Microsoft Suite.

### Krueck + Sexton Architects, Chicago, IL - Jan '18 (Seasonal)

#### Architecture Intern

- Assisted on international private sector projects by preparing drawing documents and building models under a collaborative design discussion.
- Site visits included communication with the contractor and engineer at the School of the Art Institute of Chicago (SAIC).

## Teaching Experience

### I-NOMA Design Build - Chicago, IL - May '18 - Jan '21

#### Co-Chair

- Encouraged and lead team development to reach a grant fund raising goal of 12k. Typical applicants ranged from different non-profits in the Chicago-land area.
- Planned and executed weekly one hour interactive sessions on architecture and construction with mentees ages 13-18.
- Directed non-profit relations with mentees by teaching students 3D Sketchup, and hands on drafting knowledge. Mentees and nonprofits shared continuous feedback throughout the 5 month design build.

### VAMOS - Chicago, IL - Jan '19 - Aug '19

#### Lead Mentor/Field Trip Coordinator

- Coordinated design and learn sessions for 30 students ages 11-13.
- Planned and lead trips at design communities such as Chicago Architecture Center and Bronzeville Incubator. Implemented Architecture exposure to VAMOS students with multiple field trips to firms throughout Chicago.

## Skills

Film + Video Editing  
Construction Drawings  
Graphic Design (Adobe)  
Photography + Marketing  
3D Modeling + Rendering  
Craft-making (Woodworking)  
Budgets + Proposal Presentations  
Non-Profit Programming + Management

## PROFESSIONAL EXPERIENCE

### Riley Safer Holmes & Cancila LLP

Present

*Senior Paralegal (Commercial Real Estate and Corporate)*

- Coordination, management, and supervision of all aspects of real estate transactions with the supervising attorney.
- Assist with international real estate transactions.
- Review/analyze real estate title commitments, documents of record, surveys and finalize title pro forma and review of final title insurance policies.
- Review of zoning reports, order title endorsements and prepare title escrow instructions
- Prepare conveyance documents for recording and filing and preparation of closing books/files.
- Order UCC searches and review and summarize UCC findings.
- Review tenant estoppels and SNDAs.
- Review/abstract leases and service agreements.
- Assist with all aspects of M&A transactions.
- Prepare and analyze corporate structure charts.
- Prepare ancillary organization documents, including operating agreements, bylaws, stock purchase agreements with compiled schedules, stock certificates, and ledgers, and assignment of assets.
- Entity formation, qualification, and management.

### Amata Management, LLC

9/2020 – 7/2021

*Senior Paralegal (Commercial/Residential Real Estate and Corporate)*

- Managed all real estate, corporate governance, and M&A transactions.
- Coordinate/oversee paralegal assistance tasks.
- Review and analyze acquisition contracts for critical date requirements.
- Form and maintain corporate entities.
- Assist with the preparation and filing of SEC documents: Section 16-Form ID and Forms 3, 4, 5.
- Order, review and analyze status certificates, Charter documents, UCC searches, etc.
- Prepare, review, and analyze service contracts, NDA, employment agreements, etc. (under the supervision of an attorney).
- Prepare Blue-Sky Filings, Form D, state filings.
- Prepare resolutions including deal-specific and annual meetings.
- Prepare conveyance and title clearance documents.
- Order, review and analyze title commitments, recorded documents, and surveys.
- Review and analyze lease-related documents and other due diligence items.
- Coordinate with diligence service providers.
- Assist with all aspects of the closing and post-closing processes.
- Prepare closing documents.
- Assist with business development and attend networking events.

### Dickinson Wright (fka Stahl Cowen Crowley Addis LLC)

2/2020 – 7/2020

*Paralegal (Corporate, Commercial Real Estate & Litigation)*

- Responsible for the formation of new entities, including corporations, limited liability companies, partnerships, and not-for-profits.
- Prepare ancillary organization documents, including operating agreements, bylaws, stock purchase agreements with compiled schedules, stock certificates, and ledgers, and assignment of assets.
- Processed Department of Revenue and IRS filings.
- Managed annual maintenance documents for client entities and prepared accompanying minutes, resolutions, and consents.
- Compiled and maintained corporate minute books.
- Prepared and filed Secretary of State documents, including amendments, conversions, mergers, assumed names, and dissolutions.
- Order, track, and summarize lien searches.
- Participated in commercial real estate closings and post-closing activities.
- Review purchase and sale agreements to create key-date memorandums.
- Prepared and managed estoppel certificates.
- Prepared and record grant deeds, quitclaim deeds, warranty deeds, and PCORs.
- Conduct legal and regulatory research with accurate analysis, clear and concise conclusions.
- Interface with corporate service providers, including the statutory registered agent.
- Provided direct support and services to clients, using discretion on when to handle matters independently and when to involve an attorney.

**Waterton Associates LLC**

4/2016 – 2/2020

*Paralegal and Compliance Manager*

- Worked closely with the General Counsel/Chief Compliance Officer, Vice President of Compliance, and other Executives.
- Handled a high volume of tasks, including diverse confidential projects, efficiently and effectively.
- Assisted with the coordination of complex real estate transactions, acquisitions, dispositions, and financing.
- Responsible for all new corporate structures and forecasting.
- Assisted with the implementation of the Company's compliance manual and management of the Company's compliance program, including planning, and launching compliance training and maintained compliance SharePoint site.
- Assisted with the management of the company's AML and KYC policies.
- Assisted with the preparation and administration of SEC filings.
- Handled entity formations and maintenance for new business ventures.
- Prepared and filed organizational, amendatory, dissolution, and termination documents, foreign qualifications, and withdrawals.
- Drafted officer certificates, resolutions approving corporate transactions.
- Managed jurisdictional compliance, including completion of annual resolutions, maintaining registrations, and assisted with the establishment of required licensing (business, liquor licenses, broker licenses, etc.).
- Supported closing construction financing, senior and mezzanine loans.
- Prepared and managed due diligence requests.
- Assisted with post-closing functions and management of closing documents.
- Key person to assist property managers on various compliance issues.
- Responsible for the review, approval, and management of national and property contracts.
- Interacted with external counsel and vendors.
- Managed and processed invoices for the legal department.

**Golan Christie Taglia, LLP**

10/2013 – 4/2016

*Legal Assistant***SmithAmundsen LLC**

9/2012 – 10/2013

*Corporate Legal Assistant*

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**EDUCATION AND PROFESSIONAL DEVELOPMENT****Roosevelt University***MBA-RE Candidate - 2022***Indiana Wesleyan University***Bachelor of Science in Business Administration-Human Resources Concentration - 2018***Century Business College***Certificate in Paralegal Studies - 1992*

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**SKILLS**

- Excellent research and investigative skills
- Proficient with Microsoft Office Suite
- Document Management Software
- Yardi
- State, Federal and Appellate Court, and USPTO filings
- Governmental Compliance (SEC, State and City)
- Lexis/Westlaw, PAIR, PatFT, EDGAR
- Patience in stressful situations

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**PROFESSIONAL MEMBERSHIPS**

- National Federation of Paralegal Association
- Illinois Paralegal Association
- Chicago Paralegal Association
- Urban Land Institute of Chicago
- Harold E. Eisenberg Foundation-Student Advisory Board
- ProVisor

## Professional Summary

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Looking to leverage 4+ years of client-focused experience. Proven success in leading project production from initial to end phases, efficient financial forecasting, and providing impeccable customer service. Skilled and intrinsically motivated individual with a growing passion for creating and generating success out of new challenges within the real estate industry. Candidate of Roosevelt University's Master of Science in Real Estate Program, spring class of 2023.

## Work Experience

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CUSTOMER EXPERIENCE & FOUNDATION PROGRAM SPECIALIST - Institute of Real Estate Management July 2021-Present

CUSTOMER EXPERIENCE SPECIALIST - Institute of Real Estate Management Chicago, IL June 2018 - July 2021

- Took on hybrid role with the Foundation team to tackle scholarship applicants, annual grant budgeting, and Board of Director collaboration for annual conferences.
- Integral part of new website project launch with ongoing market research and obtaining membership insight to create a more efficient and user-friendly experience.
- Aided in increasing credentialing membership through optimized membership outreach approach and improved retention rates of members with designations. Became main point of contact for registrar and corporate/private offerings., and general membership inquiries
- Active member of the IREM Social Squad that organizes monthly company-wide events as well as our Summer and Winter outings.

EVENT COORDINATOR - Chateau Bu-Sche Alsip, Illinois July 2017 - June 2018

- Managed relationships with vendors and coordinated their day of operation details.
- Catapulted team sales by 136% over and accounted for at least 25% of total monthly bookings each month during tenure.
- Conducted market analysis to highlight company strengths and in turn create a more curated and personable sales pitch.

PERFORMANCE SPECIALIST - AdKarma Columbia, Missouri January 2015 - January 2017

- Spearheaded new intercompany department dedicated to extending digital advertisements across a variety of platforms with major brands such as Yahoo!, Martha Stewart, and Ford to strengthen brand power and outreach.
- Led a Campaign Project Management team through a self-designed platform transition that streamlined reporting efficiency by 150% by combining back-end reporting systems into a consolidated and customizable reporting structure.
- Successfully accrued a total gross revenue of \$3.5M across accounts through the optimization of advertisement visibility.

## Education

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ROOSEVELT UNIVERSITY - Chicago, IL - May 2023

- Master of Science in Real Estate

UNIVERSITY OF MISSOURI - Columbia, Missouri - 2014

- Bachelor of Science in Business Administration
- Major: Management, Economics; minor in Entrepreneurship
- The Entrepreneurship Alliance of University of Missouri
- University of Missouri Men's Club Volleyball Team Captain

## **The University of Chicago Booth School of Business**

- James Buchanan

# JAMES W. BUCHANAN

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514 N. Peshtigo Ct. Apt. 1007 Chicago, IL 60611

## EDUCATION

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### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

#### Master of Business Administration Candidate

2020 - 2022

- GMAT: 750 (98<sup>th</sup> Percentile); Concentrations: Finance, Strategic Management
- Active Club & Case Involvement: Real Estate Group (Co-Chair), Private Equity Group, UT Austin Real Estate Competition
- Relevant Coursework: Real Estate Investments I, Real Estate Investments II, Corporation Finance, Microeconomics

### THE UNIVERSITY OF GEORGIA

Athens, GA

#### Bachelor of Business Administration, Finance (*Cum Laude*)

2015

Student leadership: Corsair Society (2014-15): One of twenty students selected to honors-based investment banking organization; led information sessions and mentored candidates, resulting in both mentees placed at leading investment banks

## EXPERIENCE

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### Landmark Properties

Athens/Atlanta, GA

#### Summer Associate, Development

Summer 2021

*Reported to Managing Director of newly launched Build-to-Rent Division of the nation's leading developer of Student Housing*

- Responsible for screening land sites for core metrics, drafting LOIs, creating equity packages, and performing deal underwriting and pro forma analyses for \$500M+ of deals in development pipeline representing 1,000s of new BTR homes in multiple states
- Built template and process to analyze based on underwriting metrics, rank, and map hundreds of CoStar listings simultaneously
- Gained significant exposure to both built-to-rent and student housing underwriting and development techniques and analyses
- Improved upon and simplified templates for underwriting metrics and pro forma analyses for Build-to-Rent division

### SMS ASSIST

Chicago, IL

#### Director of Finance

2018 - 2020

*Reported directly to CEO in Chief of Staff role for private technology company valued at \$1B, promoted to Director of Finance in 2019 in recognition of outstanding performance and contributions to the company*

- Member of 12-person executive team of senior-most leaders of the company who debated and decided company strategy
- Led FP&A function in traditionally post-MBA role and worked cross-functionally to drive strategic initiatives and alignment
- In-charge of pricing for all new and renewal deals for Residential division, which provides asset management and maintenance services for ~50% of all institutionally owned Single-Family Rental homes in the US (including Invitation Homes NYSE: INVH)
- Alongside Chief Strategy and Revenue Officer, developed five-year financial planning model that integrated short- and long-term financial plans with coordinated strategic initiatives and product development targets to drive EBITDA growth

### OUTCOME HEALTH

Chicago, IL

#### Associate, COO's Office

2017 - 2018

*Chief of Staff to the COO (Vivek Kundra – former CIO of the United States of America) of \$5.5B+ private technology company*

- Operated directly with COO's leadership team on a daily basis to drive strategic priorities, enhance communication between the COO and his direct reports, and provide the COO continuous visibility into the progress and execution of strategic initiatives
- Developed, analyzed, and implemented multiple organizational structure changes including a full revamp of the ad-sales team
- Created complex credit model presented to the BoD to highlight unseen risk and recommended pathway to raise additional capital

### WILLIAM BLAIR & COMPANY

Chicago, IL

#### Investment Banking Analyst, Technology Group

2015 - 2017

*Advised technology clients on strategic advisory engagements including mergers, acquisitions, and leveraged buyouts and performed and developed all valuation analyses, marketing materials, due diligence, and offering memoranda for engagements*

- On-track to be promoted to Associate within next six months, a post-MBA role, at time of exit from William Blair
- **Select Transaction Experience:** Advised clients on the execution of \$1B+ of sell-side M&A transactions across Financial Technology, Enterprise Software, and Business Services verticals
  - Paymetric – Sold to Vantiv (NYSE:VNTV) – Lead analyst on sell-side M&A engagement
  - Sterling Payment Technologies – Sold to EVO Payments – Lead analyst on sell-side M&A engagement
  - Millennium Trust Company – Sold to Parthenon Capital Partners – Analyst on sell-side M&A engagement

## ADDITIONAL INFORMATION

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- Prior Internships: William Blair & Company, Summer Analyst (2014), Wafra - Real Estate Group, Summer Analyst (2013)
- Community: BUILD – Helped raise capital to expand non-profit which brings learning through entrepreneurship to young people
- Certifications: ARGUS ASC Enterprise certified
- Interests: Exploring Chicago's restaurants, sport fishing, long-time suffering Washington sports fan

## **UCLA Anderson School of Management**

- Nuvie Ewharekuko
- Cody Kuhne
- Cynthia Phung



# NUVIE EWHAREKUKO

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## EDUCATION

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### UCLA ANDERSON SCHOOL OF MANAGEMENT

Los Angeles, CA

#### *M.B.A., Full-Time Program, Real Estate & Entrepreneurship*

June 2022

- *Honors:* Full-Tuition Consortium Fellowship; Toigo Fellow; Peter Bren Fellow in Entrepreneurial Real Estate
- *Leadership:* Anderson Student Association, President | Anderson Real Estate Association, VP of Diversity and Inclusion
- *Courses & Training:* Urban Real Estate Financing and Investing, Entrepreneurial Real Estate Development, REFM certification (in progress)

### UNIVERSITY OF PITTSBURGH

Pittsburgh, PA

#### *B.S.B.A., Marketing & General Management / Economics Minor / Certificate in Leadership & Ethics*

May 2014

- *Honors:* Full-Tuition Scholarship; Cum Laude - 3.7 GPA
- *Leadership:* Freshman Team Leader | Business Student Ambassador | Event Chair, Blue & Gold Society

## EXPERIENCE

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### MICROSOFT CORPORATION

Bellevue, WA

#### *Business Programs & Operations Intern*

June 2021- August 2021

- Built tool to automate \$4.4MM expense forecasting process, including actual spend and variances, enabling owner to better manage spend and pull insights; designed communication plan to ensure data populated on budget tool is accurate
- Drove communication process for two internal sales events by creating workback plan, crafting language for broad dissemination, and working with event stakeholders to ensure their deliverables met event specifications
- Established the Meet Microsoft MBAs initiative, a video series focused on building community within the MBA intern network and creating assets for future recruiting purposes

### JONES LANG LASALLE (JLL)

Chicago, IL

#### *Global Human Resources Associate*

May 2019 – August 2020

#### *Human Resources Advisor*

September 2017 – May 2019

#### Project Management and Marketing

- Created presentations for 15-member Global Executive Board and 950-member HR community to highlight bi-annual accomplishments including centers of excellence milestones, retention metrics, D&I data points, and forecasted HR priorities
- Developed LinkedIn strategy for Chief HR Officer and elevated HR profile industry-wide by identifying opportunities that led to more diversified content, including 1<sup>st</sup> person insights; increase of followers by 45% and post engagement by 150%
- Co-led talent review process for 15,000 employees, which included managing national timeline, training 50 HR peers & business managers on framework, and collaborating with analytics team to collect data from Tableau

#### Operations and Process Development

- Streamlined promotion and job offer approval request practices by creating data templates that incorporated account specs; trained 40 managers on new process resulting in improved business justifications and hiring turnaround time by 67%
- Initiated compensation analysis of 16 employees and identified key drivers of turnover; leveraged market research to craft responsive solutions that raised hourly rates by 4% - 25%, addressing future employee turnover
- Partnered with 13 central-region account managers to oversee performance calibrations and compensation planning against target ranges for 500 employees; ensured equity across career map levels, diversity metrics, and job titles within budget

### THE NUKO GROUP LLC

Chicago, IL

#### *Founder*

May 2017– December 2020

- Purchased 3-unit residential building and managed \$150,000 renovation project, including site selection, contractor bids, permit pulls, scope of work negotiations, and construction oversight; increased rent by 42% & created post-sale ROI of 12%
- Managed daily property operations, including leasing, repairs and maintenance, and rent collection; maintained 100% occupancy through COVID by strengthening tenant relationships and responding promptly to tenant requests
- Analyzed expense history to forecast expenditures and built financial model to regularly track financial health of asset

## ADDITIONAL

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*Extracurriculars:* Previously Licensed Illinois Real Estate Broker | Creator, Be a Real Estate Investor workshop series | Riordan Fellow Mentor | 2019 – 2020 National Program Lead, JLL Black Professional Network

*Interests:* Monopoly | Texas Hold 'Em | All Things Food | Start-up Stories | Karaoke Queen | The Bachelor/Bachelorette Aficionado

## CODY KUHNE

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www.linkedin.com/in/cody-kuhne

### EDUCATION

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#### UCLA ANDERSON SCHOOL OF MANAGEMENT

Los Angeles, CA

##### *M.B.A., Full-Time Program, Real Estate*

June 2022

- *Honors and Leadership:* President of Anderson Real Estate Association; Director of Admissions Ambassador Corps; Riordan Fellows Mentor; Full-Tuition Consortium Fellow
- *Membership:* Investment Finance Association; Outdoor Adventure Club; Alliance for Latinx Management at Anderson
- *Case Competition:* Team Captain, UT Austin McCombs National Real Estate Challenge

#### ARIZONA STATE UNIVERSITY

Tempe, AZ

##### *B.S., Economics*

May 2016

- *Honors & Leadership:* Provost Scholar; Vice President of Alumni Relations, Tau Kappa Epsilon Fraternity
- *Study Abroad & Certificates:* Autonomous University of Barcelona, Certificate of International Business

### EXPERIENCE

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#### INVESCO REAL ESTATE

Newport Beach, CA

##### *Underwriting Intern, Equity Investments*

June 2021 – Present

- Underwrote forward sale on 2 industrial buildings in Utah, prepared memos for initial screening and final Investment Committee resulting in placement of \$60M of client capital at 125 basis point discount to market cap rates
- Underwrote acquisition of 1,222-unit multifamily property in Arizona for \$300M utilizing complex financing structure of municipal bonds and tax credits to produce a favorable cost of capital and strong cash yields
- Prepared screening and Investment Committee memos for industrial portfolio of 3 developments and 2 forward sales in Nevada resulting in placement of \$42M and \$175M client capital
- Revised stale underwriting of 200-unit townhome in Idaho and made recommendation to pass on the opportunity resulting in preservation of \$60M of client capital

#### BENEDICT CANYON EQUITIES

Los Angeles, CA

##### *Acquisition Analyst, Multifamily*

Jan 2021 – June 2021

- Underwrote multifamily acquisition targets ranging from \$25M to \$100M to support value-add fund, 1031 exchange advisory, and core-plus investment vehicles
- Performed market research to determine investment feasibility in markets by analyzing rents, researching sales comparables, evaluating demographics, and evaluating economic fundamentals

#### AMERICAN AIRLINES

Fort Worth, TX

##### *Team Leader, Supply Chain*

May 2019 – July 2020

- Championed 8-member cross-functional team to source \$90M of furniture, fixtures and equipment for corporate real estate resulting in \$13M savings against budget (14%)
- Designed and supervised new 'Shared Services' team of 4 Commodity Managers responsible for \$200M annual spend across 7 business units; reduced onboarding timeline by 3 weeks and balanced workload by delegating projects effectively
- Implemented security services vendor consolidation strategy by performing market analysis, issuing RFP's, and analyzing proposals, reducing security costs from \$46M to \$42M (9% annual savings)
- Instituted back-office furniture standardization strategy to eliminate \$1M un-budgeted spend (4% savings) by collaborating with corporate real estate to optimize supply base and create system-wide process for furniture refreshes
- Attained \$4.5M contribution of capital improvements to corporate dining venue by negotiating with food service vendor

### ADDITIONAL

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- *Certifications:* ARGUS Enterprise; REFM (Real Estate Financial Modeling)
- *Community Engagement:* Community Outreach, 2<sup>nd</sup> Saturday Ministry; Volunteer, Leukemia & Lymphoma Society
- *Interests:* Skiing, attending concerts, traveling (25 countries and counting), basketball, volleyball, cooking

## Cynthia Phung, CPA

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### EDUCATION

#### UCLA ANDERSON SCHOOL OF MANAGEMENT

Los Angeles, CA

##### *M.B.A., Full-Time Program, Real Estate*

Jun. 2022

- *Leadership*: VP of Education in Association for Real Estate at Anderson, Anderson Career Team (ACT) Coach – Real Estate, Co-President & Co-Founder of Spirits at Anderson, President of Eats at Anderson, EDI Student Advisory Council
- *Case Competition*: 2021 BAML Low Income Affordable Housing Challenge (Finalist – Honorable Mention)
- *Volunteer Work*: Riordan MBA Fellows Mentor, Net Impact Board of Directors Fellow (Non-Profit - Fulfillment Fund)

#### UC BERKELEY

Berkeley, CA

##### *B.A., Economics, 3.5 GPA*

May 2014

### EXPERIENCE

#### INVESCO *Global investment management firm with \$83B in real estate AUM*

San Francisco, CA

##### *Real Estate Underwriting Intern*

Jun. 2021 – Aug. 2021

- Contributed to the underwriting of 8 potential investments valued at \$1B, of which \$400M closed, consisting of office, life science, and industrial properties across various funds with different risk strategies.
- Prepared investment committee packages and performed due diligence, including scrutinizing leases, reviewing environmental reports, performing market research, and analyzing sales, land, and lease/rent comparables.

#### ALEXANDRIA REAL ESTATE EQUITIES *\$1.9B REIT in biotech/healthcare sector (NYSE: ARE)*

Pasadena, CA

##### *Senior Accountant, Real Estate Development*

Nov. 2018 – Sep. 2020

- Managed construction loan draws, feasibility studies, and lease agreements for \$22M redevelopment of 80,000 SF lab and office building, enabling the JV to focus exclusively on leasing and operations, and increasing occupancy from 27% to 100%.
- Oversaw construction accounting and schedules for 3.1M SF across 42 commercial lab and office properties by collaborating with project managers; ensured completion of projects within budget and on schedule.
- Created monthly construction status and spend packages to provide updates to a Google-owned JV partner on development of 59,000 SF opioid treatment center in Ohio.
- Developed a novel analytic tool to automate monthly accounting close process for \$15M expenditures across 250 small development projects, reducing the number of projects to be analyzed by 65%.

#### HALO TOP CREAMERY *\$400M innovative low-calorie ice cream startup*

El Segundo, CA

##### *Accounting Supervisor*

Oct. 2017 – Oct. 2018

- Created financial analysis template to track material costs for 30 existing ice cream products and new ice cream products in R&D; analysis led to 12 new product launches.
- Supervised team of 3 accountants consolidating cost data for 100+ ice cream ingredients; presented analysis that led to manufacturing changes and reduction in costs by 10%.
- Spearheaded special projects, such as creating manufacturing operations quality control manual and recruiting 3 bookkeepers to prepare for international expansion to Canada, Australia, and UK.

#### PRICEWATERHOUSECOOPERS (PwC)

Los Angeles, CA

##### *Senior Assurance Associate, Consumer & Industrial Products*

Aug. 2014 – Sep. 2017

- Collaborated with partners and managers to manage, train, and mentor 5-member audit teams serving 3-member client teams, ensuring on-time deliverables including signoff on 10-K and 10-Q reports and resolution of client concerns.
- Developed and implemented process workflow strategies by evaluating areas of financial statements to be audited, identifying team resources to perform work, and establishing schedules and milestones.
- Improved client relationships by analyzing satisfaction survey results and interviewing client team members; retained key client by enhancing audit team's work processes and communication.

### ADDITIONAL

- *Professional Affiliations*: Member - Board of Directors of Hollywood Community Housing Corporation (nonprofit affordable housing developer), ULI LA Young Leaders Group (YLG) - Social Committee, ULI YLG Partnership Forum, ICSC Member
- *Certifications*: CPA (Lic. #129754), California Real Estate Salesperson (Lic. #02005918), Argus Certification (In Progress)
- *Software*: JD Edwards, Insight, Essbase, Unifier (Project Management), Argus
- *Languages*: Mandarin (Limited Proficiency), Cantonese (Limited Proficiency)
- *Interests*: Whiskey and cocktail aficionado, Author of a culinary history blog ([www.foodworthwritingfor.com](http://www.foodworthwritingfor.com)), Member of Culinary Historians of Southern California, Restaurants, Architecture, Reading novels

**USC (University of Southern California)**  
**Marshall School of Business & Price School of Public Policy**

- Louis Benedict
- Tyson Bryan
- Javier De Leon
- John Frnka
- Marcos Salido

# Louis Benedict, CFA

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## EDUCATION

### University of Southern California

Los Angeles, CA

*Master of Business Administration*, Marshall School

May 2022

*Dollinger Master of Real Estate Development*, Price School

May 2022

- Relevant Coursework: Real Estate Financial Modeling, Urban Land Development, Advanced Real Estate Law
- GPA 3.8/4.0; Dean's List (Fall 2020); Awarded Guilford C. Babcock Scholarship & Graduate Scholarship
- VP, Graduate Real Estate Association

### George Washington University

Washington, D.C.

*Bachelor of Arts, Economics*

May 2016

- Founder & President, Club Squash; Operations & Alumni Relations Director, Finance and Investments Club

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## EXPERIENCE

### Capital One

New York, New York & Vienna, VA

*Senior Equity Research Associate, Real Estate Investment Trusts (REITs)*

2017 – 2020

Researched public apartment, health care, and student housing REITs with \$190B+ aggregate market capitalization for bank with \$370B in assets. Developed and conveyed investment theses to global institutional investors and company executives.

- Increased quality of research votes (votes from institutional investors for best sell-side research) by 300% in one year together with senior analyst
- Built and maintained financial models with granular earnings estimates for 18 companies, identified trends in large datasets, contributed to writing of 400+ published research notes distributed to 925+ investors and public company executives
- Ideated and executed differentiated research (e.g. assessing the impact of future city and state minimum wage increases on healthcare REIT expenses in 2019 / 2020)
- Discussed questions generated from fundamental research with covered companies' management 6+ times monthly; answered investors' stock-specific questions and justified financial modeling assumptions
- Initiated coverage on 18 REITs in Apartment, Healthcare, Student Housing sectors with senior analyst
- Incorporated knowledge gleaned from meeting with 65+ investors and company executives at bi-annual National Association of Real Estate Investment Trusts Investor Conference into individual stock theses
- Led by example through mentoring junior teammates without formal program; enhanced productivity by improving engagement and demonstrating best practices; recommended intern hired full-time in 2017

### Goldman Sachs

New York, New York

*Equity Research Associate, Food Distributors & Restaurants*

2016 – 2017

Researched company fundamentals, economic and sector-specific trends impacting public restaurants and food distributors with \$500B+ aggregate market capitalization for global investment bank.

- Wrote first drafts of published research notes after identifying restaurant industry trends in 450+ data point economic reports (e.g. Bureau of Labor Statistics' Employment Situation Summary)
- Evaluated pricing and menu offering strategy of global fast-food chain in 6 cities using manually sourced data from 40 quarterly earnings call transcripts; analysis supported maintaining Hold investment rating
- Supported price increase estimates by collecting 240 quarterly total revenue figures for 20 publicly traded restaurants from first quarter 2015 to fourth quarter 2017 earnings reports

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## ADDITIONAL INFORMATION

*Skills:* Argus Enterprise Certified, Bloomberg Terminal Certified, intermediate-advanced proficiency in Axiometrics, Capital IQ, CoStar, Microsoft Excel, Real Capital Analytics, REIS

*Professional Affiliations:* CFA Institute, NAIOP, ULI

*Interests:* Abstract painting, tennis, skiing

# Tyson Bryan

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## EDUCATION

**University of Southern California, Marshall School of Business** – Los Angeles, CA **May 2022**

*Master of Business Administration (STEM), Concentration in Entrepreneurship and Real Estate*

- Leadership: *VP – Training and Competition*, Graduate Real Estate Association
- Recognition: Dean's List (Spring 2021), UT Austin National Real Estate Challenge Participant (Fall 2020)
- Relevant Coursework: Argus Enterprise, REFM, & ACRE Financial Modeling
- Professional Affiliations: ULI – Orange County, Inland Empire; NAIOP – SoCal; and CREFC

**Brigham Young University, Marriott School of Management** – Provo, UT **April 2014**

*Bachelor of Science in Business Management, Corporate Finance Emphasis; GPA: 3.5/4.0*

- Leadership: *President*, BYU Finance Society; *Small Cap Team Leader* – Student Managed Investment Fund
- Achievements: Global Management Certificate recipient, Asia Business Study Abroad participant (Spring 2011); 1<sup>st</sup> Place, Business Language Case Competition – Spanish (Spring 2013)
- Service: Volunteer mission in Mexico City, Mexico for The Church of Jesus Christ of Latter-day Saints (2008-2009)

## EXPERIENCE

**The Howard Hughes Corporation** – Houston, TX & Las Vegas, NV **Summer 2021**

*Summer Associate, Strategic Development and Capital Markets Groups*

- Earned significant Development Underwriting Experience across property types and including land acquisition
- Regularly participated in OAC meetings and conducted analysis across development stages. Key projects included HBU Analysis, RFP Drafting, Architect Selection, Optimal Office RSF Unit and Floorplate Sizing, and a Credit Review Template for new office tenants
- Optimized the Corporate DCF Model by adding a scenario switchboard and streamlined regional department inputs
- Drafted a Memo and Presented Findings to Executive Leadership on the state of the Condo Market in the Houston area. Key findings included demographic trends, target customers, lessons learned from previous projects, market study highlights, and competitor analysis (optimal unit pricing and sizing, and “must-have” amenities)

**Goldman Sachs** – New York, NY **2016-2020**

*Investment Banking Associate, Financial Institutions Group (2017-2020)*

*Investment Banking Analyst, Financial Institutions Group (2016-2017)*

### Select M&A Transaction Experience

- Buy-side financial advisory for a SPAC in the contemplated acquisition of various tech-enabled lenders
- Sell-side financial advisory for **Scotiabank** in the sale of its Latin American pension and insurance operations
  - 51% ownership stake in Colombian operations sold to AFP Habitat; terms undisclosed, announced August 2019
  - Dominican Republic operations sold to Grupo Rizek; terms undisclosed, announced December 2018
- Sell-side financial advisory for **Old Mutual** in the sale of its Latin American franchise (pension, insurance, and asset management) to CMIG International; terms undisclosed, announced March 2018
- Sell-side financial advisory for **Sura Asset Management** in the sale of its Chilean annuities business to Bicecorp; \$232mm, announced March 2018

### Select Residential Real Estate Sector Experience (tech-enabled mortgage platforms, originators, servicers, and REITs)

- COVID-19 related analysis: Buy-side M&A, burn down book value, and rescue finance analysis
- Additional analysis: DCF/SOTP valuation; capital structure optimization; rating agency presentations; financing committee memos; asset/industry benchmarking and regression; and REIT formation considerations incl. modeling
- \$1.4bn of capital markets equity financing transactions across convertible, follow-on, and preferred equity issuances

**Goldman Sachs** – Salt Lake City, UT **2014-2016**

*Equity Research Analyst, Latin American Financial Institutions Research*

- Assisted in publication of written research reports including buy/sell/hold calls and analysis for ad-hoc client requests for a coverage universe of 25 stocks (bank, insurance, market structure and merchant acquirer businesses)
- Built various company specific and benchmarking models with detailed projections, to drive DDM/DCF valuation
- Maintained country specific credit and financial system databases utilizing various country regulator disclosed data

## SKILLS & INTERESTS

- Service: Early morning *Seminary Teacher* for the Church of Jesus Christ of Latter-day Saints (10 students)
- Interests: All things motorcycles, open-water diving (PADI certified), and exploring parks with my wife and daughters

# Javier De Leon

Los Angeles, CA • javierd@marshall.usc.edu • (323) 861-2301 • linkedin.com/in/deleonjavier

## EDUCATION

### University of Southern California

Los Angeles, CA

*Master of Business Administration*, Marshall School of Business

May 2022

*Dollinger Master of Real Estate Development*, Sol Price School of Public Policy

May 2022

### Universidad Iberoamericana

Mexico City, Mexico

*Bachelor of Laws (LL.B.)*

2014

## EXPERIENCE

### Cirrus Real Estate Partners

New York, NY

(Real estate investment firms)

*Intern, Acquisitions / Investments (remote)*

February 2021 – Present

- Conduct financial modeling and valuation analysis for potential investments.
- Selected transaction experience:
  - Completed ~USD \$90 Million senior mortgage and mezzanine loan financing package in order to refinance a defaulted ~USD \$50 Million loan of One Thousand Museum, an 84 unit, 469,334 sq ft condominium tower in Miami, FL.

### Thor Urbana, Thor Equities Group

Mexico City, Mexico

Real estate investment fund/development company; 17 projects in Mexico and Belize with a capitalization of ~USD \$3 Billion.

*Legal Acquisitions Associate*

2017 – 2020

- Lead local and foreign teams in transactional law (M&A, Project Finance, Capital Markets) in all the stages of the company's investments and developments. Total deal value overseen ~USD \$500 Million.
- Structured buy-side transactions in collaboration with the company's investments department. My collaboration with this department resulted in being brought in as part of Chief Investment Officer's investment committee.
- Selected transaction experience:
  - Completed Joint-Venture deal with Mota-Engil for the ~USD \$150 Million development of a Ritz-Carlton Hotel and Residences in the Costa Canuva development (Nayarit Riviera), including the execution of a Hotel Management Agreement with Marriott International.
  - Completed ~USD \$120 Million acquisition of Marina Town Center, a luxury retail center in the Puerto Cancun development, with 485,000 sq ft of leasable space, including ~USD \$50 Million refinancing.

### Greenberg Traurig, LLP

Mexico City, Mexico

International full-service law firm with 40 locations worldwide and ~2,000 lawyers.

*Real Estate Legal Associate*

2015 – 2017

- Advised clients in the real estate sector. Entrusted by law firm partners with being the main point of contact with clients and directly handling negotiations with counterparties.
- Drafted framework deal documents and due diligence reports both in English and Spanish.
- Selected transaction experience:
  - Represented Amistad Global Development, an industrial real estate developer, in its ~USD \$125 Million issuance of structured development equity securities (CKDs) through the Mexican Stock Exchange (the company's first public security issuance).

## ADDITIONAL INFORMATION

- Citizenship: Dual U.S. and Mexican citizenship.
- Languages: English and Spanish, native.
- Interests: Connoisseur of the best taco spots in Los Angeles and Mexico City (*i.e. best "Carnitas" taquerias - El Momo and Rincon Tarasco, respectively*).

# John G. Frnka

Hawthorne, CA • jfrnka@usc.edu • (972) 824-0953

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## EDUCATION

### University of Southern California

*Dollinger Master of Real Estate Development*, Price School of Public Policy

*Master of Business Administration*, Marshall School of Business

- Student Board: MBA.PM Core Class President, GREA VP of Industry Outreach

Los Angeles, CA

Graduating May 2022

Graduating May 2022

### University of Texas at Arlington

*Bachelor of Science, Mechanical Engineering; Minor: Nuclear Engineering*

- Extra-Curricular: Division I Track and Field – Decathlon; 2014 Academic All-American

Arlington, TX

December 2014

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## EXPERIENCE

### CT Realty

*Investment Analyst Intern*

Newport Beach, CA

June 2021- August 2021

Responsible to the SVP and Partners for acquisitions and overseeing industrial development projects in the pipeline

- Underwrite market and off-market deals using market data and quotes gathered from consultants
- Exclusively managed parcel assembly of multiple sites in Southern California
- Participate in development management of four million square feet of industrial product in construction and stabilization
- Assist in land acquisition and entitlements for renewable natural gas fueling stations across the country
- Conduct market analysis for lease negotiations and underwriting

### Nuclear Submarine Officer, United States Navy

Norfolk, VA

Responsible to the Commanding Officer for tactical operations planning, risk management, program execution and process improvement of a \$2.5B submarine, nuclear reactor plant, and over 150 personnel

*Assistant Professor of Naval Science – University of Southern California*

July 2019- July 2021

- Taught classes on Naval Engineering and mentored Naval ROTC students to be the Navy's next leaders

*Analyst, Shift Supervisor – OOD*

April 2018- July 2019

- Led a team of 35 sailors trained in tactical submarine positioning, sensor and weapons employment, maintenance, casualty response, and reactor plant operation to execute the ship's mission

*Analyst, Shift Supervisor –EOOW*

July 2017- July 2019

- Led a team of 11 nuclear trained electricians, electronic technicians, mechanics, and chemists in the operation, maintenance, and casualty response of a nuclear reactor plant

*Assistant Director, Weapons Department*

November 2018- July 2019

- Led over 50 sailors in the day-to-day planning, operation, maintenance, training, and process improvement for over \$1B of weapons and sonar technology

*Director, Communications Division*

April 2018- November 2018

- Led a division of 12 in the operation and maintenance of state-of-the-art communications systems affecting the ship's mission and warfare capabilities

*Director, Reactor Controls Division*

January 2017- April 2018

- Responsible for a division of 11 Reactor Technicians and their maintenance, operations, and training

*Student, Naval Nuclear Training Pipeline*

January 2015- December 2016

- Completed Basic Officer Training, Advanced Nuclear Power Training, and Submarine Officer Basic Training

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## SKILLS & INTERESTS

- *Skills:* DOE certified Nuclear Engineer Officer, Underwriting in Excel and Argus, Airbnb Super Host
- *Interests:* Real Estate Investing, Golf, Trojan Football



# MARCOS SALIDO

Marcos-Salido@outlook.com • (949) 439-7113 • Pasadena, CA

## SUMMARY

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Construction management professional with a strong technical background and 3+ years of experience in project operations at a leading firm in Los Angeles, California. Interests include real estate and urban development.

## KEY SKILLS

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Technology/Software: AutoCAD • Bluebeam • Procore • CMiC • Microsoft Project • Microsoft Office Suite • Primavera P6 • OSHA 30 Certified  
Other: Bilingual in English & Spanish

## WORK EXPERIENCE

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Shawmut Design & Construction—Los Angeles, CA

February 2019 to Present

### **Asst. Project Manager/Asst. Superintendent**

- Collaborate with estimating and purchasing departments to set up projects to ensure profitability, client satisfaction, and overall project success
- Supervise and coordinate construction activities in various aspects, maintaining an updated and accurate project schedule
- Perform detailed tracking of all financial data for current projects
- Ensure and maintain strict compliance with contract specifications and quality standards, verifying that operations are carried-out in a safe and productive manner
- Projects include flagship retail stores, and high-end clients such as Burberry, Apple & Harry Winston

Kiewit Corporation—Santa Fe Springs, CA

June 2018 to February 2019

### **Field Engineer**

- Led the field team by verifying that work is completed according to plans and specifications
- Prepared daily reports by recording construction progress and production rates against budget
- Completed engineering designs for temporary structures
- Reviewed plans, specifications, and weekly schedules to ensure all supplies, tools, and permanent materials were being procured accordingly

## EDUCATION

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University of Southern California—Los Angeles, CA

2021- 2024

### **Master of Business Administration - MBA**

Part-time Program for Professionals & Managers

California Baptist University (CBU)—Riverside, CA

2014 - 2018

### **Bachelor of Science in Civil Engineering (Cum Laude)**

Member of American Society of Civil Engineers (ASCE) branch at CBU

Honors: Kappa Mu Epsilon Math Honor Society, Ambassador Merit & Engineering Scholarships

## VOLUNTEER AND CROSS-CULTURAL EXPERIENCE

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Urban Land Institute

July 2020 - Present

### **Young Leader**

- Network with local and global members through online seminars around shaping the built environment and cultivating a sustainable real estate industry

Global Vision School—Seoul, South Korea

Summer 2016

### **Volunteer English Teacher**

- Developed lesson plans and activities in English for Korean children of ages 5-13
- Collaborated with local schools and supported by carrying out educational activities

**University of Wisconsin-Madison**  
**Wisconsin School of Business**  
**James A. Graaskamp Center for Real Estate**

- Zachary Brenner
- John Kujawski
- Daniel Mandel
- Margeaux Wysocky

# ZACHARY D. BRENNER

(713) 492-4019 • linkedin.com/in/zdbrenner • zdbrenner@wisc.edu

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## PROFILE

Licensed attorney with more than six years of experience successfully litigating and negotiating deals seeking an opportunity to leverage past experience in law and architecture to pursue a career in real estate. Outstanding written and verbal communication skills with the ability to learn quickly, analyze and diagnose complex matters, and produce results.

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2021 – 2023

*Master of Business Administration Candidate*

- Specialization: Real Estate
- Real Estate Coursework: Real Estate Finance, Real Estate Valuation, Excel and Argus Modeling
- Recipient: Wisconsin School of Business Alumni Fellowship
- GMAT: 710

**Loyola University Chicago School of Law, Chicago, IL** 2012 – 2015

*Juris Doctor, Cum Laude*

- GPA: 3.6 / 4.0; Class Rank: Top 17%
- Loyola University Chicago Law Journal: editor (Vol. 45) and (Vol. 46)
- CALI Award for highest grade in five classes
- Academic Tutor for Legal Writing

**University of Houston, Houston, TX** 2006 – 2010

*Bachelor of Architecture, Cum Laude*

*B.S. Environmental Design, Cum Laude*

- Minor: Political Science
- Collegiate Honors from The Honors College
- Led and collaborated on many team design projects and design competitions

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## PROFESSIONAL EXPERIENCE

**Schmidt, Rupke, Tess-Mattner & Fox, S.C., Brookfield, WI** 10/19 – 08/21

*Associate Attorney – Civil Litigation*

- Advocated for injured individuals; advised and represented businesses on real estate, contractual, and employment issues
- Researched and prepared multiple appellate briefs and numerous trial court motions
- Brought in new clients, analyzed facts to determine value of claims, developed path to maximize recovery, and drove progress to ensure successful resolutions.
- Recovered hundreds of thousands of dollars on behalf of injured individuals; 100% of clients' past medical bills paid
- Developed streamlined process for collecting and analyzing clients' medical records
- Negotiated settlements and contractual issues; advised clients on benefits and drawbacks of settlement versus litigation

**Conway & Josetti, LLC, Brookfield, WI** 01/17 – 09/19

*Associate Attorney – Civil Litigation*

- Represented insurance companies and their insureds at trial and appellate level
- Managed personal injury/property damage, construction defect, and insurance coverage files, beginning to end
- Supervised collection and analysis of medical and employment records
- Negotiated settlements through direct negotiations and mediation

**The Honorable David L. Borowski, Milwaukee County Circuit Court** 06/15 – 01/17

*Staff Attorney – Civil and Probate Divisions*

- Authored numerous decisions on diverse subject matter while studying for the Bar exam
- Affirmed on 100% of appealed decisions, including one affirmed by the Wisconsin Supreme Court

**The Reynolds and Reynolds Company, Houston, TX** 08/11 – 07/12

*Project Specialist, Manufacturer Integration*

- Managed and coordinated communications software development projects from inception to rollout
- Drafted new product software design documents from manufacturer specifications
- Conducted thorough testing on new software; provided technical support to customers

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## VOLUNTEER EXPERIENCE

**Wills for Heroes, various locations in WI** 2016 – 2020

- Prepared and executed wills and other estate planning documents for first responders

# JOHN KUJAWSKI IV

[linkedin.com/in/john-kujawskiiv](https://www.linkedin.com/in/john-kujawskiiv) • [jpkujawski@wisc.edu](mailto:jpkujawski@wisc.edu) • (631) 702-0942

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## PROFILE

*Versatile self-starter with over 7 years real estate sales, development, and investment experience for brokerage with >\$100MM sales. Stellar multi-tasking capabilities across administration, budgets, P&L, asset management, negotiations, and due diligence. Creative problem solver adept at delivering on-time, on-budget results. Excellent organizational and time-management skills to thrive in a dynamic, fast-paced environment.*

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business**

**2021 – 2023**

*Master of Business Administration Candidate*

**Concentration:** Real Estate

**Relevant Coursework:** Real Estate Finance, Real Estate Valuation, Excel & Argus Modeling, Real Estate Equity Investment

**Stony Brook University**

**2013 – 2015**

*Bachelor of Science, Business Management*

**Concentration:** Finance; **Minor:** Sustainability Studies

**Suffolk County Community College**

**2010 – 2013**

*Associates in Business Administration*

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## PROFESSIONAL EXPERIENCE

**Icon Properties Real Estate Specialists**

**06/14 – 07/21**

*New Business Acquisition Manager*

**01/20 – 07/21**

- Championed new business development, brokerage acquisitions, conducted aggressive cold-calling, emailing, and local canvassing in the surrounding areas.
- Collaborated with real estate team to utilize LinkedIn research and reached out to Asset Managers to drive revenues and increase profitability for brokerage by gaining more REO assets.
- Identified investment sales opportunities navigating REO and short sales with hedge funds while preparing over 1,000 Broker Price Opinions.
- Built sales tools to engage homeowners and clients, creating strong presentations and presenting to homeowners and prospects to drive sales and profitability.
- Provided knowledge across local property values, Section 8 and HUD Programs, and fair and accurate leasing terms.
- Streamlined financial analysis and investment strategies, creating numerous cash flow models and analysis for brokerage investments.
- Analyzed net operating income, new business costs, and ROI to identify and implement processes to streamline workflow operations while maximizing efficiency, cost-performance, and profitability.
- Managed day-to-day operations, including 10+ rehab projects on-time and on-budget, reviewing construction budgets, overseeing vendor relations, and performing site inspections for REO compliance.
- Trained over 50 new agents and new hires on the ins and outs of local real estate, in addition to learning any new REO software, compliance and offer any advice.

*Executive Assistant*

**06/14 – 01/20**

- Delivered comprehensive administrative support while overseeing office operations, executive communications, scheduling, planning, and logistics with discretion and confidentiality.
- Achieved \$7MM sales over 7-year career with a total of 25+ homes sold throughout.
- Collaborated with team to establish second office location and gain traction within local community, by joining local boards and networking with local business owners.
- Delivered exemplary financial stewardship, innovated new wire transfer and billing systems to monitor transactions, assets, and expenses with precision.

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## COMMUNITY INVOLVEMENT

- Member of team in creation of Icon Cares, charity wing of Icon Properties Real Estate Specialists
- Successfully donated over 50 baskets of toys, candy & more in 1<sup>st</sup> year to local Little Flower Organization

# DANIEL MANDEL

(414) 412-1244 • <https://www.linkedin.com/in/danieljmandel/> • djmandel@wisc.edu

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## PROFILE

*Accomplished leader with experience underwriting nationwide loans and developments. Proficient at analyzing markets, finances, and data to deliver actionable insights for improved decision making. Believes in building communities through responsible capital sources and have served on a non-profit entity issuing interest free loans. Skilled at cultivating and maintaining strong relationships.*

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2020 – 2022

*Master of Business Administration Candidate*

- Specialization: Real Estate ("RE") in the James A. Graaskamp Center for Real Estate. Certificate in Business Analytics.
- Incoming teaching assistant for hedge fund manager Jim Chanos (Kynikos Associates, LP) in fall Financial Fraud Forensic Approach for 40 graduate students, Dr. Erwan Quintin's Corporation Finance for 220 undergraduates, and Dr. Oliver Levine's Corporation Finance.
- Co-Vice President and Future Co-President of the University of Wisconsin-Madison Real Estate Club.
- GPA 3.97/4.00. Recipient "Together Forward" Merit Scholarship. Winner of the Ignite Team Case Challenge.
- Key Coursework: RE Excel Modeling, RE Private Equity I-II, RE Commercial Development, Negotiations, Affordable Housing Development, Risk Financing Techniques, Financial Modeling in Excel, Data Visualization for Business Analytics, Risk Analytics and Behavioral Science.

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2012 – 2015

*Bachelor of Business Administration*

- Majors: Real Estate and Urban Land Economics; Economics. Recipient Graduation with Distinction (Top 10%). "Curt S. Culver" Merit Scholarship. **Publication:** Mandel, Daniel (2015), "Urban Rail Transit Expansions", in Urban Land Economics, Springer International.
- Key Coursework: Retail and Office Modeling using ARGUS and Excel, RE Presentation and Investment Analysis, RE Capital Markets, RE Healthcare, RE Site Layout and Building Floor Plate Design, RE Valuation, RE Law, RE Finance, Financial Investment Theory and Practice.

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## PROFESSIONAL EXPERIENCE

### TerraLane Communities, Phoenix, AZ

03/21 – 08/21

*Summer Real Estate Associate*

- Created new processes and reports to update stakeholders on the progress for five (5) new horizontal multi-family communities with total development costs over \$240MM while underwriting five (5) new development opportunities with total development costs over \$330MM.
- Constructed a sale vs. refinance analysis to assist ownership evaluate options to unlock cash for new development opportunities.

### BB Living Residential, Phoenix, AZ

09/19 – 05/20

*Vice President of Data Analytics*

- Facilitated eight (8) monthly local land acquisition calls with national partners to receive proprietary housing and land activity data in order to monitor new opportunities, analyze submarkets, and underwrite new nationwide land acquisitions for communities of build-to-rent single-family homes with total costs over \$500MM.
- Prepared two (2) comprehensive land acquisition investment committee memos for new community developments valued over \$80MM to expand firm's development pipeline.
- Crafted recommendations to homeowner's associations (HOA) to reduce HOA expenses for communities under contract by examining community legal documents resulting in stronger deal-level financial returns.
- Led search for multi-family data source by evaluating proposals, negotiated with best vendor to obtain a custom solution while reducing cost by \$8,000 annually, initiating data integration, and optimizing investment modeling and monitoring.

### KeyBank Real Estate Capital, Phoenix, AZ

12/17 – 05/19

*Underwriter*

- Underwrote over 50 multi-family loans totaling \$890MM for purchase by the "agencies" (Fannie Mae, Freddie Mac) by identifying problems, proposing solutions, conducting due diligence, and leading coordination calls generating over \$17MM in revenue.
- Specialized agency underwriting of 15 loan assumptions totaling more than \$200MM by working with buyers, sellers, and investors to identify problems and propose solutions creating over \$1MM in revenue.

### KeyBank Real Estate Capital, Phoenix, AZ

07/15 – 11/17

*Senior Production Analyst*

- Collaborated with deal team and clients to originate over \$2.4B in multi-family loans for purchase by "third-party investors" (agencies, life insurance companies, and FHA) by scrutinizing opportunities and composing submissions achieving over \$47MM in revenue.
- Trained, mentored, and distributed workflow to five (5) new analysts resulting in improved team productivity.
- Established new technological efficiency initiatives resulting in streamlined production process and time savings.

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## LEADERSHIP EXPERIENCE / PROFESSIONAL ASSOCIATIONS

- Wisconsin Real Estate Alumni Association Member and Mentor to current students. 01/14 – Present
- Urban Land Institute Member and Arizona Partnership Forum Young Leader. 05/17 – Present
- Non-profit: Board member and committee member spearheading new community outreach initiatives. 07/17 – 08/21

**INTERESTS:** golf, reading the *Wall Street Journal*, swimming, watching comedy shows, spending time with family and friends

# MARGEUX C. WYSOCKEY

(847) 736-3357 • [linkedin.com/in/margeauxwysockey](https://www.linkedin.com/in/margeauxwysockey) • [wysockey@wisc.edu](mailto:wysockey@wisc.edu)

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## PROFILE

Motivated MBA candidate transitioning commercial real estate functions from brokerage to private equity/investments. Seeking to apply prior commercial real estate experience in client-facing roles and leveraging MBA real estate analytical and technical skills for future transaction-focused internships. Strong communication skills combined with the ability to learn quickly and develop effective interpersonal relationships and produce tangible financial results.

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2021 – 2023

*Master of Business Administration Candidate*

- Specialization: Real Estate, Finance
- Key Coursework: Real Estate Finance, Real Estate Excel and Argus Modeling, Real Estate Private Equity Investment I (of 3)
- Recipient: Forte Fellowship, Goldie B. Wolfe Initiative Scholarship for Women in Commercial Real Estate
- Activities/Other: Real Estate Club, Business Buddy (Student Ambassador to an International MBA Student)

### University of Illinois–Urbana/Champaign, Champaign, IL

2012 – 2016

*Bachelor of Liberal Arts & Sciences*

- Major: Communication
- Activities/Leadership: University of London, Birkbeck (Study Abroad); Alpha Phi Sorority – Vice President, Director of Formal Recruitment, Risk Manager; American Advertising Federation – NSAC Competition (National Student Advertising Competition, 1 of 3 Freshman chosen for the 2012/2013 team)

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## PROFESSIONAL EXPERIENCE

### Colliers International, Los Angeles, CA

04/19 – 06/21

*Transaction Manager*

- Managed clients with over 100+ locations under the Tenant Representation umbrella (Occupier Services group); coordinated of 30+ transactions weekly, including project initiation and scope, financial analysis, competitor benchmarking, transaction tracking and forecasting, lease abstraction, coordinating project status, client-related due diligence, feasibility studies, lease administration, etc.
- Initiated and executed project timelines and completion dates until tenant build-outs begin
- Examined and communicated quarterly and annual cost savings for clients through capital expenditure analysis, straight-line rent and occupancy evaluations

### Insight Global, Los Angeles, CA

07/16 – 04/19

*Outside Sales Account Manager, Sales Development & Recruiter Training Program*

- Developed relationships with executives, directors and managers at Fortune 1000 companies in the Los Angeles area, including Lockheed Martin, Medtronic, Universal Music Group, AT&T, etc.; pursued 150+ cold & referral contacts each day (via phone) to expand the account footprint
- Discovered and prospected new clientele to find where companies were struggling in their hiring efforts; achieved \$300k annual revenue; formally presented service offerings with a customized strategy specific to the client's hiring model; managed 20-30 weekly client interactions in social settings, with strong attention to customer service
- Trained and mentored recruiter trainee on sales acumen and business development know-how; performed full life cycle recruiting from client intake to candidate search, interviews, references, candidate offers and onboarding

### Transwestern, Chicago, IL

06/15 – 08/15

*Commercial Real Estate Intern*

- Teamed with two additional interns for a rotational internship where we were introduced to agency leasing, tenant representation, capital markets, project management, property management and marketing
- Produced a mock pitch and in-depth analysis of Millennials & the Real Estate Market for brokers and regional president
- Collaborated with brokers on the business development of their targeted industries, including legal, finance and technology

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## PROFESSIONAL TRAINING/CERTIFICATIONS/LICENSES

- Certificates: State of California – Department of Real Estate (Licensed Real Estate Salesperson #02120774)
- Software and Tools: Excel, ARGUS

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## INTERESTS/ACTIVITIES/VOLUNTEERING

- Interests: Bikram Yoga, Reading, Canines, Skiing, Cooking, Podcasts, Trader Joe's, Bravo Network, Travel
- Volunteer/Activities: Wags for Walks (Volunteer – West Los Angeles); Bambino (Babysitter); UCLA Extension (Additional Coursework: Accounting, Finance, Commercial Real Estate Leasing)