# REAL ESTATE FINANCIAL MODELING CONSULTANTS PROFILE BOOK

#### INSTRUCTIONS

- 1. This resource is provided to you and the individuals herein by www.AdventuresinCRE.com free of charge
- 2. Review the profiles of professionals included herein
- 3. Identify one or more individuals you'd like to contact about taking on your consulting project
- 4. Contact those individuals via email or Linkedin using the contact information provided herein
- 5. Share the specifics of your project and request a quote
- 6. Negotiate a rate and then formally engage the consultant to complete the project

By proceeding, you agree to the follow terms:

Adventures in CRE **provides this resource as a free service to you and to the individuals herein**. It does not earn a referral fee nor commission, and is not party to any agreement that you may make with any individual named herein.

We are not responsible or liable for any work, nor do we participate in any work, produced by individuals within this document.

Although all individuals herein have completed the A.CRE real estate financial modeling Accelerator and have represented to us to have experience in this field, we have not independently verified their claims.

You understand that we do not manage, control, or have any legal relationship with the individuals herein. You agree that any consulting agreement you make with any of the individuals herein you make AT YOUR SOLE RISK AND THAT ADVENTURES IN CRE PROVIDES THIS RESOURCE TO YOU WITHOUT WARRANTIES OF ANY KIND BY US, EXPRESSED, IMPLIED OR OTHERWISE. UNDER NO CIRCUMSTANCES ARE WE LIABLE FOR ANY DAMAGES ARISING FROM THE AGREEMENT OR RELATIONSHIP BETWEEN YOU AND THE INDIVIDUALS HEREIN.

GENERAL AND CONTACT INFORMATION

Name: JP de Bruin Years in Commercial Real Estate: 8 Years

Date of Accelerator Completion: 8-May-18

Email Address: jp@reiivest.com
LinkedIn Profile: https://www.linkedin.com/in/jpdebruing102/

Undergraduate degree name/date (if applicable):

Graduate degree name/date (if applicable):

BSc Real Estate, University of Pretoria, 2014

\* BSc Hons Real Estate, University of Pretoria (Completing 2020 part time)

Brief Description about you:

I am a level-headed and ambitious pursuant of anything commercial real estate. I love learning and have an insatiable desire to learn from other peoples who've done it before. I am an avid golfer, although my handicap probably won't reflect the same :P.

I started my CRE career as an appraiser and after 2,5 years I moved into capital raising position and more business development. Spending three years with a international investment firm, mainly raising equity in South Africa to do acquisitions in the US, I moved over to a young and modern real estate brokerage in Gauteng, South Africa, hungry for more deal front experience. I have since advise on many deal structures/restructuring and also built portfolio models for the launch of a new fund with multiple scenario stress testing variable included.

#### High level Summary of some of the Projects/Models Built outside Accelerator Courses:

\* Office Development Modeling (100 Bishops Gate, London) - added support for tenants with different lease types, calculate returns to both equity and mezzanine

investors build a mixed IRR/multiple-based waterfall schedule

\* Hotel Acquisition & Renovation - assumptions for different market and operational scenarios, including Base, Upside, and Downside cases and Independent vs.

Franchise cases

\* Multifamily Acquisition & Credit Anlysis - multifamily acquisition and credit analysis model and make an investment recommendation on the Senior Loan, Mezzanine

or Preferred Equity used to fund the property.

\* Office/Retail Acquisition & Renovation - build an acquisition and renovation model for a mixed-use office/retail property and make investment recommendations for the

Limited Partners, General Partners, Senior Lenders, and Mezzanine Investor

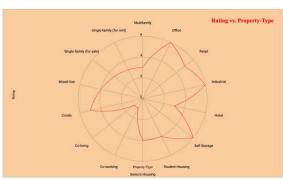
\* Pre-Sold Condo Development (Heritage Cyrela, Sao Paulo, Brazil) - build a condo development model for the Heritage Cyrela, a super-high-end luxury complex in São Paulo to

make investment recommendations for the Limited Partners and Developers and identify the key risk factors in the deal

#### REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

Property-Type	Rating
Multifamily	3
Office	6
Retail	5
Industrial	6
Hotel	3
Self-Storage	6
Student Housing	4
Seniors Housing	4
Co-working	1
Co-living	1
Condo	4
Mixed-Use	3
Single-family (for sale)	NA
Single-family (for rent)	NA



Analysis Type	Rating
Development	4
Value-Add	5
Core	6
Acquisition	6
Asset Management	2
Portfolio Management	4
Property-Level Analysis	6
Portfolio-Level Analysis	6
Tax-Credit Enabled Investments	2
Ground Lease Investments	3
Partnership-Level (Waterfall Modeling)	6
Modify Models from A.CRE Library	6
Using the A.CRE All-in-One Model	6
Modeling in ARGUS Enterprise	1
Variable Scenario Based Modeling (Stress Testing)	6



#### MODELING PROFICIENCY GUIDE

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- $_{\rm 3}\,$  I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (ro+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- $_{7}\,$  I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)

NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: Dan Johnston Years in Commercial Real Estate: 4 Years
Date of Accelerator Completion: 1-Jan-21 Hourly Rate (\$100/hr USD minimum): \$200 /hr

Email Address: dnljnstn@gmail.com
LinkedIn Profile: https://www.linkedin.com/in/dan-johnston-a58473b3/

Undergraduate degree name/date (if applicable):

BA in Business Marketing, 2017

Graduate degree name/date (if applicable):

MBA (Real Estate and Finance), Expected Dec 2023

## Brief Description about you:

I am currently in an acquisitions role with a real estate private equity firm in Dallas, TX. I have been working in commercial real estate for 4 years with the first year spent in investment sales and the past three years spent on the principal side. My focus has mostly been on office, industrial, and retail but have worked on numerous multi-family and student housing projects. The value I can provide as an independent contractor includes financial modeling in Argus and excel, lease analysis, due dilligence support, and the creation of investment memorandum materials.

## REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

<u>Property-Type</u>	<u>Rating</u>	Analysis Type	<u>Rating</u>
Multifamily	3	Development	4
Office	7	Value-Add	7
Retail	6	Core	5
Industrial	6	Acquisition	7
Hotel	3	Asset Management	5
Self-Storage	5	Portfolio Management	4
Student Housing	4	Property-Level Analysis	7
Seniors Housing	4	Portfolio-Level Analysis	5
Co-working	3	Tax-Credit Enabled Investments	2
Co-living	3	Ground Lease Investments	4
Condo	3	Partnership-Level (Waterfall Modeling)	6
Mixed-Use	6	Modify Models from A.CRE Library	6
Single-family (for sale)	3	Using the A.CRE All-in-One Model	3
Single-family (for rent)	3	Modeling in ARGUS Enterprise	7
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)
- NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: David Walsh Years in Commercial Real Estate: 10 Years
Date of Accelerator Completion: 21-Aug-20 Hourly Rate (\$100/hr USD minimum): \$250 /hr

Email Address: <a href="mailto:terra.consulting@protonmail.com">terra.consulting@protonmail.com</a>
LinkedIn Profile: <a href="mailto:https://www.linkedin.com/in/david-walsh-30510586/">https://www.linkedin.com/in/david-walsh-30510586/</a>

Undergraduate degree name/date (if applicable): Property Investment, Appriasal & Development / June 2014
Graduate degree name/date (if applicable):

#### Brief Description about you:

I graduated from University of Ulster, Jordanstown with a BSc Property Investment, Appraisal & Development degree in July 2014.

I would consider myself a highly competent and enthusiastic professional with a proven track record in the real estate industry. Possessing extensive knowledge and a strong track record of financial modelling and analysis of various real estate assets across a number of sectors.

## REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

<u>Property-Type</u>	<u>Rating</u>	Analysis Type	<u>Rating</u>
Multifamily	7	Development	7
Office	5	Value-Add	7
Retail	5	Core	7
Industrial	5	Acquisition	7
Hotel	6	Asset Management	5
Self-Storage	5	Portfolio Management	5
Student Housing	7	Property-Level Analysis	5
Seniors Housing	7	Portfolio-Level Analysis	5
Co-working	5	Tax-Credit Enabled Investments	1
Co-living Co-living	7	Ground Lease Investments	2
Condo	3	Partnership-Level (Waterfall Modeling)	7
Mixed-Use	7	Modify Models from A.CRE Library	5
Single-family (for sale)	7	Using the A.CRE All-in-One Model	5
Single-family (for rent)	7	Modeling in ARGUS Enterprise	NA
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)
- NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: Duong Hoang Years in Commercial Real Estate: 10 Years
Date of Accelerator Completion: 23-Aug-21 Hourly Rate (\$100/hr USD minimum): \$100 /hr

Email Address: <a href="mailto:duonghoang46dh@gmail.com">duonghoang46dh@gmail.com</a>
LinkedIn Profile: <a href="mailto:https://www.linkedin.com/in/hoang-duong/">https://www.linkedin.com/in/hoang-duong/</a>

Undergraduate degree name/date (if applicable):

Bachelor of Economics/ 28-Dec-2006

Graduate degree name/date (if applicable):

Master of Business Administration/ 04-Dec-2015

#### Brief Description about you:

I am Duong, with 10+ years experience in Real Estate Financial Modeling. I have worked at a global real estate agency (as a Senior Financial Analyst) and two multinational real estate developers/ investors (as a Deputy Finance Manager and an Investment Manager). I have built financial models in Excel for 100+ real estate developments (Hotel, Resort, Serviced Apartment, Apartment for Sale, Villa, Office, Retail, etc.) worldwide (USA, Spain, Saudi Arabia, Australia, Costa Rica, South Africa, Ethiopia, Myanmar, Vietnam, etc.).

#### REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

<u>Property-Type</u>	<u>Rating</u>	Analysis Type	<u>Rating</u>
Multifamily	1	Development	7
Office	6	Value-Add	4
Retail	6	Core	3
Industrial	3	Acquisition	7
Hotel	7	Asset Management	1
Self-Storage	2	Portfolio Management	3
Student Housing	1	Property-Level Analysis	7
Seniors Housing	1	Portfolio-Level Analysis	3
Co-working	1	Tax-Credit Enabled Investments	1
Co-living Co-living	2	Ground Lease Investments	1
Condo	6	Partnership-Level (Waterfall Modeling)	4
Mixed-Use	6	Modify Models from A.CRE Library	2
Single-family (for sale)	6	Using the A.CRE All-in-One Model	1
Single-family (for rent)	2	Modeling in ARGUS Enterprise	NA
Resort	7	Modeling in ARGUS EstateMaster DF	6
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)
- NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: Ian Hawk Years in Commercial Real Estate: 5 Years
Date of Accelerator Completion: 1-Jan-21 Hourly Rate (\$100/hr USD minimum): \$300 /hr

Email Address: <a href="mailto:ianyhawk@gmail.com">ianyhawk@gmail.com</a>
LinkedIn Profile: <a href="mailto:https://www.linkedin.com/in/ianhawk/">https://www.linkedin.com/in/ianhawk/</a>

Undergraduate degree name/date (if applicable):

Graduate degree name/date (if applicable):

Bachelors in Finance / May 2018

N/A

# Brief Description about you:

Ian focuses on capital markets and underwriting commercial real estate debt & equity investments backed by transitional real estate assets and new developments. Ian previously worked as a senior analyst on Walker & Dunlop's New York City Capital Markets team where he focused on project specific and portfolio-level debt and equity capital for real estate developers, and institutional and entrepreneurial sponsors across all asset types throughout the United States. Ian completed over \$3.5 billion in transactions, including JDS Development's 1 Southside Park, L&L's Metropolitan Tower, and Tidal's 1111 Church. He began his career as an analyst on the commercial mortgage team at Fitch Ratings, where he specialized in CRE CLO's and CMBS, and contributed to Fitch's Single Family Rental Securitization Model.

#### REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

ng <u>Analysis Type</u>	<u>Rating</u>
7 Development	7
6 Value-Add	7
6 Core	7
7 Acquisition	7
5 Asset Management	NA
3 Portfolio Management	NA
4 Property-Level Analysis	7
3 Portfolio-Level Analysis	7
3 Tax-Credit Enabled Investments	NA
3 Ground Lease Investments	7
7 Partnership-Level (Waterfall Modeling)	6
7 Modify Models from A.CRE Library	6
7 Using the A.CRE All-in-One Model	6
7 Modeling in ARGUS Enterprise	7
IA Modeling in Rockport Val(1)	7
IA Offering Memorandum	7
IA Loan Document Review	7
	7 Development 6 Value-Add 6 Core 7 Acquisition 5 Asset Management 3 Portfolio Management 4 Property-Level Analysis 3 Portfolio-Level Analysis 3 Tax-Credit Enabled Investments 3 Ground Lease Investments 7 Partnership-Level (Waterfall Modeling) 7 Modify Models from A.CRE Library 7 Using the A.CRE All-in-One Model 7 Modeling in ARGUS Enterprise 8 Modeling in Rockport Val(1) 9 Offering Memorandum

(1) ARGUS Enterprise alternative, I also have a per-

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)
- NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: Mario A Giglio III Years in Commercial Real Estate: 5 Years

Date of Accelerator Completion: 1-Jun-22 Hourly Rate (\$100/hr USD minimum): \$300 /hr

Email Address: gigliomario3@gmail.com
LinkedIn Profile: https://www.linkedin.com/in/mariogiglio3/

Undergraduate degree name/date (if applicable):

Graduate degree name/date (if applicable):

N/A

N/A

## Brief Description about you:

My Name is Mario Giglio, I am currently an Assistant Vice President at NAI Farbman specializing in Investment Sales. My group primarily focuses on Retail, Office, and Industrial. We represent a number of institutional clients including CMBS Special Servicers and other lenders as well as private sellers. During my time I have sold over \$250MM in real estate and underwritten close to \$1B. I have either sold or underwrote a wide variety of deals including: STNL, Value Add Office/Retail/Industrial, Stabilized Portfolios and everything in between. In addition to my time in investment sales I also support over 25 brokers in the office with ad hoc financial analysis for their clients. Recently I have started supporting our 3rd party clients with acquisitions help. My current project is helping work through a lease/own scenario for a surgical group. Outside of work I enjoy playing chess and rock climbing--2 activities that require a high degree of critical thinking and problem solving skills. I enjoy being challenged and working through/solving problems.

#### REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a pruriency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

<u>Property-Type</u>	Rating	Analysis Type	<u>Rating</u>
Multifamily	1	Development	1
Office	7	Value-Add	6
Retail	7	Core	6
Industrial	7	Acquisition	3
Hotel	NA	Asset Management	NA
Self-Storage	1	Portfolio Management	NA
Student Housing	1	Property-Level Analysis	NA
Seniors Housing	1	Portfolio-Level Analysis	NA
Co-working	1	Tax-Credit Enabled Investments	NA
Co-living Co-living	1	Ground Lease Investments	NA
Condo	1	Partnership-Level (Waterfall Modeling)	2
Mixed-Use	2	Modify Models from A.CRE Library	2
Single-family (for sale)	1	Using the A.CRE All-in-One Model	2
Single-family (for rent)	1	Modeling in ARGUS Enterprise	7
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA

#### MODELING PROFICIENCY GUIDE

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)

NA I'm not interested modeling this type of task

**GENERAL AND CONTACT INFORMATION** 

Name: Michael Oppenheim Years in Commercial Real Estate: 3 Years

Date of Accelerator Completion: 17-Feb-21 Hourly Rate (\$100/hr USD minimum): \$100 /hr

Email Address: <a href="meo339@Stern.NYU.edu">meo339@Stern.NYU.edu</a>
LinkedIn Profile: <a href="https://www.linkedin.com/in/michaeloppenheim1/">https://www.linkedin.com/in/michaeloppenheim1/</a>

Undergraduate degree name/date (if applicable):

Graduate degree name/date (if applicable):

NYU Stern School of Business / 2022

## Brief Description about you:

After graduating from Northwestern University, I spent a few years honing my Excel modeling skills as a Growth Strategy consultant at The Cambridge Group before deciding the real estate world was exactly what I was looking for. A bag full of real estate books and the A.CRE Accelerator brought me up to speed with great comfort while I obtained my MBA. At NYU Stern I specialized in Real Estate, Finance, and Sustainable Business and also led the Stern Real Estate Club as President. Since completing my MBA I have enjoyed continuing to improve my modeling skills and experience across a variety of asset classes, regions, and strategies.

#### REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

<u>Property-Type</u>	<u>Rating</u>	Analysis Type	<u>Rating</u>
Multifamily	4	Development	3
Office	5	Value-Add	5
Retail	4	Core	4
Industrial	5	Acquisition	5
Hotel	2	Asset Management	4
Self-Storage	3	Portfolio Management	2
Student Housing	2	Property-Level Analysis	5
Seniors Housing	2	Portfolio-Level Analysis	2
Co-working	1	Tax-Credit Enabled Investments	3
Co-living Co-living	1	Ground Lease Investments	2
Condo	1	Partnership-Level (Waterfall Modeling)	4
Mixed-Use	5	Modify Models from A.CRE Library	NA
Single-family (for sale)	1	Using the A.CRE All-in-One Model	2
Single-family (for rent)	1	Modeling in ARGUS Enterprise	2
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)
- NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: Emmett Harris Years in Commercial Real Estate: 5 Years

Date of Accelerator Completion: 8-Apr-19 Hourly Rate (\$100/hr USD minimum): \$250 /hr

Email Address: <a href="mailto:emmett.harris.3.eh@gmail.com">emmett.harris.3.eh@gmail.com</a>
LinkedIn Profile: <a href="mailto:https://www.linkedin.com/in/emmett-harris/">https://www.linkedin.com/in/emmett-harris/</a>

Undergraduate degree name/date (if applicable):

Graduate degree name/date (if applicable):

MS in Finance / 2003

## Brief Description about you:

Currently, I am a senior quantitative analyst with Bank of America and I have supported analytic and modeling efforts for mortgage pricing, consumer and small business products, customer centricity, and marketing brand and favorability. I have a strong background in finance and economics, which spans over 20 years. My tool skillset includes Microsoft Excel and Access, Google Sheets, SAS, and Python.

## REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

<u>Property-Type</u>	<u>Rating</u>	Analysis Type	<u>Rating</u>
Multifamily	6	Development	3
Office	2	Value-Add	4
Retail	2	Core	4
Industrial	2	Acquisition	6
Hotel	2	Asset Management	3
Self-Storage	3	Portfolio Management	6
Student Housing	2	Property-Level Analysis	6
Seniors Housing	2	Portfolio-Level Analysis	6
Co-working	1	Tax-Credit Enabled Investments	1
Co-living Co-living	1	Ground Lease Investments	2
Condo	1	Partnership-Level (Waterfall Modeling)	4
Mixed-Use	2	Modify Models from A.CRE Library	2
Single-family (for sale)	4	Using the A.CRE All-in-One Model	2
Single-family (for rent)	4	Modeling in ARGUS Enterprise	1
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA
[Add others, if applicable	NA	[Add others, if applicable	NA

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)
- NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: Alexander Moroz Williams Years in Commercial Real Estate: 5.0 Years

Date of Accelerator Completion: 12-May-20 Hourly Rate (\$100/hr USD minimum): \$175 /hr

Email Address: consulting.amw@gmail.com
LinkedIn Profile: https://www.linkedin.com/in/alexandermorozwilliams/

University of Wisconsin - Madison BBA - Real Estate & Urban Land Economics May 2018

Undergraduate degree name/date (if applicable): Graduate degree name/date (if applicable):

#### Brief Description about you:

Seasoned real estate professional and investor with multi-market experience ranging in acquisitions, development, and capital markets. Involved in over \$10 billion of multifamily transactions while at CBRE. Currently work in Real Estate Private Equity and Development with a flexible schedule for consulting. I will partner with you to advise on more than just the numbers and will get your deal across the finish line.

Clients include developers, PE firms, investment advisors, and individual investors. Past projects include custom model builds, edits of existing models, deal analysis and underwriting, market research, pitch deck/OM preparation, financial modeling and deal analysis coaching & tutoring.

#### REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

Property-Type	<u>Rating</u>	Analysis Type	<u>Rating</u>
Multifamily	7	Development	7
Office	6	Value-Add	7
Retail	5	Core	7
Industrial	7	Acquisition	7
Hotel	5	Asset Management	5
Self-Storage	5	Portfolio Management	5
Student Housing	6	Property-Level Analysis	7
Seniors Housing	5	Portfolio-Level Analysis	5
Co-working	5	Tax-Credit Enabled Investments	5
Co-living	5	Ground Lease Investments	4
Condo	5	Partnership-Level (Waterfall Modeling)	7
Mixed-Use	4	Modify Models from A.CRE Library	6
Single-family (for sale)	7	Using the A.CRE All-in-One Model	6
Single-family (for rent)	7	Modeling in ARGUS Enterprise	4
Short Term Rental	7	[Add others, if applicable	NA
Pitch Deck/OM Preparation	7	[Add others, if applicable	NA
Build to Rent	7	[Add others, if applicable	NA

# MODELING PROFICIENCY GUIDE

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)

NA I'm not interested modeling this type of task

GENERAL AND CONTACT INFORMATION

Name: Terry Kipp Years in Commercial Real Estate: 6 Years
Date of Accelerator Completion: 15-Dec-19 Hourly Rate (\$100/hr USD minimum): \$350 /hr

 Email Address:
 Terry@QuantifiedCapital.com

 LinkedIn Profile:
 https://www.linkedin.com/in/terrykipp/

Undergraduate degree name/date (if applicable):

Graduate degree name/date (if applicable):

Seton Hall University; Bsc Finance / 2014

N/A

## Brief Description about you:

I'm a seasoned analyst with institutional underwriting experience at Prudential Real Estate Investors, J.P. Morgan's Global Real Assets, and Pacolet Milliken Entrprises. During my career, I've had the pleasure to underwrite over \$6 billion in real estate opportunities that led to the successful closing of over \$1 billion of transactions in Multifamily, Office, Retail, and Industrial assets throughout the United States.

#### REAL ESTATE FINANCIAL MODELING PROFICIENCY

Enter a profiency rating 1 to 7 for each item. See the proficiency guide below for more details. Enter "N/A" if you have no interest in that particular modeling task.

Property-Type	<u>Rating</u>	Analysis Type	<u>Rating</u>
Multifamily	7	Development	7
Office	7	Value-Add	7
Retail	7	Core	7
Industrial	7	Acquisition	7
Hotel	4	Asset Management	7
Self-Storage	3	Portfolio Management	7
Student Housing	4	Property-Level Analysis	7
Seniors Housing	4	Portfolio-Level Analysis	7
Co-working	3	Tax-Credit Enabled Investments	5
Co-living	3	Ground Lease Investments	7
Condo	5	Partnership-Level (Waterfall Modeling)	7
Mixed-Use	7	Modify Models from A.CRE Library	6
Single-family (for sale)	7	Using the A.CRE All-in-One Model	6
Single-family (for rent)	7	Modeling in ARGUS Enterprise	7

- 1 No experience or I am not comfortable in this area
- 2 I have very little experience in this area (i.e. 1-3 modeling projects)
- 3 I have some experience (3+ modeling projects)
- 4 I have moderate experience and I'm comfortable modeling this area (5+ modeling projects)
- 5 I have extensive experience and I'm fully comfortable modeling this area (10+ modeling projects)
- 6 I consider myself an expert in this area with both experience and relative mastery (1+ years experience)
- 7 I am a complete master in this area throw anything at me and I can solve it! (2+ years experience)
- NA I'm not interested modeling this type of task