

Trusts & Estates



Real Estate Management

Because real estate holds a significant position in many portfolios, we view it not only as a property to be managed but as an investment. That's why we provide our trust client the best of both worlds: top professionals for hands-on property management and oversight, and the right strategies intended to help increase the value of real estate assets.

Real Estate Investment Management

Portfolio Analysis

- Financial performance of real assets
- Property-valuation
- Tax analysis
- Recommendations- for risk reduction and diversification
- Recommendations for enhanced return

Market Assessment and Feasibility Studies

- Liquidate or collateralize a portion of real assets
- Property renovation or remodeling
- Develop plans
- Obtain necessary permits
- Oversee construction
- Property re-characterization
- Land use change, zoning changes, entitlements or condemnation

Real Estate Fee Schedule

Sales, Leasing, Acquisitions and Tax-Deferred 1031 Exchanges (including tenants-in-common "TIC" transactions)

- Develop overall marketing strategy for sale
- Conduct property searches
- Structure the sale, purchase, leasing or 1031 Exchange
- Conduct negotiations
- Manage closing process

Property Tax Appeals

Financing

- Secure new loans
- Debt restructuring

Direct the Activities of Limited Liability Companies