



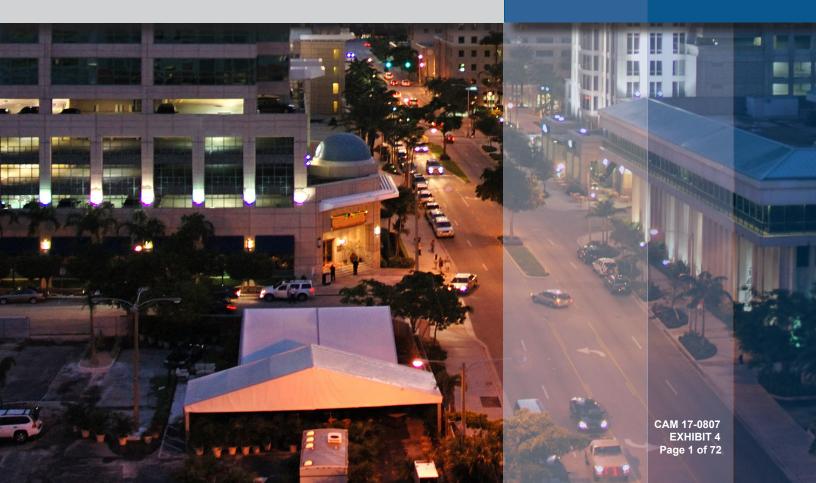
OPEN DATE: APRIL 7, 2017 | DUE DATE: MAY 1, 2017



RESPONSE TO RFP # 975-11940



PREPARED BY:
Kenneth Krasnow
Executive Managing
Director & Market
Leader | South Florida





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### 4.2.2 EXECUTIVE SUMMARY

On behalf of Colliers International South Florida, LLC (Colliers), we appreciate the opportunity present our qualifications for consideration by the City of Fort Lauderdale (the City) for the scope of work in Bid 975-11940, Real Estate Brokerage Services.

One way to describe our services simply is: We analyze and optimize. In short, we look forward to the opportunity to partner with the City to first fully understand the goals and operational drivers and then deliver customized real estate advisory and services in the shared pursuit of these goals. In our response, we have endeavored to illustrate the dedicated team and process-driven disciplines that will guide our understanding, accountability and results every step of the way.

Our value proposition and key elements for the City can be summarized as follows:

### > Strong Colliers South Florida Footprint

- With five South Florida offices (Palm Beach, Boca Raton, Fort Lauderdale, Plantation and Miami), Colliers International South Florida, LLC plans to draw upon the shared resources from all offices but service this mandate directly out of our Fort Lauderdale headquarters, located at 200 East Broward Boulevard – see table below.
- Colliers International South Florida, LLC is registered as a legal entity in the State of Florida.
   Key licensing information may be found in Required Forms.
- o Additional details on our office background and firm overview can be found starting on page 4.

Colliers Internation	nal South Florida, LLC
Address:	200 East Broward Boulevard Suite 120 Fort Lauderdale, FL 33301
Contact:	Kenneth M. Krasnow, Executive Managing Director & Market Leader
Telephone:	+1 954 652 4600 Fax: +1 954 652 4637
E-mail:	ken.krasnow@colliers.com
Website:	www.colliers.com or www.colliers.com/southflorida

### > Integrated Services Project Team with a Single Point of Contact

 Each Colliers team member brings unique specialization and experience to form an integrated solution that adds up to something more than the sum of its parts. The single point of contact or Key Account Partner will be supported by a team of senior brokerage professionals and





value-added services lines to provide holistic property solutions for the City's diverse portfolio. All are an integral part of the City project team and will ensure the project's execution is aligned with the City's strategic and operational goals.

### EXECUTIVE OVERSIGHT Ken Krasnow Executive Managing Director & Market Leader Fort Lauderdale KEY ACCOUNT MANAGER



REAL ESTATE BROKERAGE



Alfie Hamilton
Executive Vice President
Fort Lauderdale



Ronald Schagrin
Senior Vice President
Fort Lauderdale



INDUSTRIAL SERVICES
Steve Wasserman
Executive Vice President
Fort Lauderdale



RETAIL SERVICES

Russ Bornstein

Senior Vice President
Boca Raton



RETAIL SERVICES

Katy Welsh
Senior Vice President
Boca Raton



HOTEL SERVICES
Rich Lillis
Executive Vice President
Boca Raton



Gerard Yetming
Executive Vice President
Miami



MARINAS SERVICES

Mike Nissley

Executive Vice President
Boca Raton



AFFORDABLE HOUSING

Kevin Morris
Senior Vice President
Fort Lauderdale

### VALUE-ADD RESOURCES



VALUATION SERVICES
Charles Badell
Managing Director
Miami



Verity Mosquera
Research & Consulting Manager
Fort Lauderdale



MARKETING
Kris Mitchell
Marketing Manager
Fort Lauderdale



PR & COMMUNICATIONS

Leah Dellis

Marketing Communications Specialist
Miami



OPERATIONS

Amanda McFarlane

Administrative Manager
Fort Lauderdale





### > Specialized Experience in the Government Real Estate Sector

Colliers understands that government and public sector procedures for acquiring, managing and disposing of real property can be subject to layers of regulations, policy, legislation and special orders. Our Government Solutions Group has proven expertise in charting a clear path of successful execution for clients and will leverage our shared services and diverse global platform to deliver value for the City as well.

### > Specialized Experience in Affordable Housing

O Colliers' Affordable Housing Group is regarded as one of the industry's leading HUD, LIHTC, and Affordable multifamily investment groups in this highly specialized asset class and will apply this expertise to our work with the City. Our team has extensive hands-on experience in the sale of LIHTC and multifamily properties with Project Based Section 8, HUD Insured debt, state agency financed and value-add subsidies.

### > Personalized, Local Expertise with the Backing of a Global Service Powerhouse

Our core project team has roots in the Fort Lauderdale community, with deep relationships and deal-making expertise in the same region which we call home. Backed by the the large-scale resources, integrated platform, relevant multi-market experience and footprint of a global leader, our local project team has a firm understanding of evolving trends in South Florida real estate and the relationships essential to provide optimal results for the City.

### > Competitive and Transparent Fee Structures

- o The opportunity to partner with the City of Fort Lauderdale is a top priority to Colliers. Our competitive pricing structure reflects this but still allows us to provide senior-level talent and outstanding services and resources to exceed the City's expectations.
- o Full details on proposed fee structure may be found on our Cost Proposal on page 26.

### > Agility and Implementation Timeline

- Our Colliers team is available to mobilize immediately. For many clients, we begin due diligence immediately upon verbal award of contract and recognizing the importance of excellent communications and reporting make earnest efforts to introduce the project team and key client stakeholders prior to kick-off.
- o Our proposed timeline begins on Page 11, Approach to Scope of Work.





### 4.2.3 EXPERIENCE AND QUALIFICATIONS

### **FIRM OVERVIEW**

• Relative size of the firm, including management, technical and support staff; licenses and any other pertinent information.

Colliers International Group Inc. (NASDAQ: CIGI; TSX: CIG) is a global leader in real estate services, committed to accelerating the success of the City of Fort Lauderdale through the strength and depth of our local specialists, a culture of service excellence and a shared sense of initiative. We are the third-largest global real estate firm based on total annual revenue of \$2.6 billion.

### 2016 Statistics: Global

- > **396** offices
- > **68** countries
- > **15,000** professionals and staff
- > 2 billion square feet under management
- > **72.000** lease/sale transactions
- > **\$105** billion in total transaction value

### 2016 Statistics: South Florida

- > **5** offices
- > **3** counties
- > 130 professionals and staff
- > **5.5** million square feet under management
- > **331** lease/sale transactions
- > \$772 million in total transaction value

On the local level, Colliers International South Florida proudly employs 130 professionals that live in the very same South Florida communities where we provide our services. This is currently comprised of 46 brokerage professionals, 19 support professionals (marketing, research, consulting, IT), four valuation professionals and a team of 59 Real Estate Management (REMs) or Property Management professionals. There are leadership roles in each of the five South Florida offices, with two designated management roles.

Please refer to Appendix B for information on our firm license.

• Indicate the firm's number of years of experience in providing the professional services as it relates to the work contemplated.

As a global entity, our firm has been in operation more than 118 years. We proudly trace our roots back to a local firm founded in 1898, when Macaulay Nicolls, a real estate insurance agency was registered in Vancouver, BC. Macaulay Nicolls soon added a partner and became Macaulay Nicolls Maitland. In the early 1980s, it joined forces with Colliers International, an Australian firm founded in 1976. Colliers was established in the U.S. in 1978. Today, we hold on to those local roots and have steadily grown our business through customized client solutions, global and regional accountability for our clients, and innovation.







On the local level, Colliers International South Florida, LLC was formed in 2015, bringing together some of the region's most experienced and savvy commercial real estate professionals to service the changing needs of the South Florida property landscape.

• Indicate business structure, i.e.: Corp., Partnership, LLC. Firm should be registered as a legal entity in the State of Florida; Company address, phone number, fax number, E-Mail address, web site, contact person(s), etc.

Colliers International South Florida, LLC is registered as a legal entity in the State of Florida.

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Contact:	Kenneth M. Krasnow, Executive Managing Director & Market Leader
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E-mail:	ken.krasnow@colliers.com
Website:	www.colliers.com or www.colliers.com/southflorida

Please refer to Appendix B for information on our firm license.

• Indicate the firm's initiatives towards its own sustainable business practices that demonstrate a commitment to conservation.

As one of the world's largest real estate service providers, Colliers is in a unique position to have a dramatic, positive impact on the environment while generating significant competitive advantage for our clients. Some of our initiatives include:

- > Professional Knowledge Development: To help our professionals generate sustained economic and ecological value for our clients and investors, we actively support them in their knowledge development. Colliers University offers more than 15 classes focused on sustainability and green building and has coached many of our professionals on achieving LEED® Accredited Professional and LEED® Green Associate status.
- Client Support & Implementation: We offer our owner and landlord clients assistance with the greening of their properties, including assistance with LEED® Certification, property management and marketing the benefits of sustainability to potential investors and occupiers. We help tenants select spaces that are aligned with their environmental, social and economic goals, including cost savings, efficiency, employee wellness and productivity.







- o Local Fort Lauderdale Property Management initiatives include:
  - > Janitorial program using more than 50% environmentally-friendly cleaning products
  - > Energy modeling and analytics platform to forecast and adjust energy spending Exterior lighting operated by photocells
  - > Interior lighting on occupancy sensors and using energy-efficient bulbs
    Water efficiency in restrooms controlled by hands-free, battery-powered faucets and
    Dual Flush Water Saving Flush-o-meters
  - > Car charging stations for sustainable transportation
  - > Comprehensive recycling programs to manage everything from paper to lightbulbs
- > Leadership in Sustainability: Colliers is also the first and only commercial real estate services provider to be a founding partner of the World Green Building Council and the Regenerative Network. Additionally, we support national councils such as the US Green Building Council, in markets across the globe. Colliers has also been instrumental in forming new national Green Building Councils around the world, and serves as ambassador and advisor for these organizations.

### **PROJECT TEAM**

Proposer or principals must demonstrate relevant experience in Real Estate & Brokerage services.

Our firm has assembled a senior-level, multi-disciplined team that will provide the strategic guidance and services necessary to support the real estate and operational goals of City of Fort Lauderdale. Comprised of Brokerage professionals across various property types – Office, Industrial, Retail, Hospitality, Multi-family, Marina and Affordable Housing – the core transaction team will also have the added depth of experienced individuals in Valuation, Research/Consulting, Marketing, Public Relations and Operations. Full team member resumes may be found in Appendix A.

Acting as the City's primary point of contact will be **Key Account Manager** Brooke Berkowitz\*, who has proven experience leading strategic accounts within the public sector, including work directly with the City of Fort Lauderdale. As a fully-dedicated resource to the City, the Key Account Manager works closely with the full Colliers team to custom-tailor a set of integrated services selected from the firm's range of business lines. This approach allows Colliers to streamline communications and for the City to benefit from the most responsive, customized and nimble real estate solutions.

Colliers Market Leader Ken Krasnow brings more than 30 years of acclaimed expertise in the commercial real estate industry and will be providing **Executive Oversight** to the account, including resource allocation, to ensure the City receives the highest quality real estate services.

<sup>\*</sup> TRADE SECRET: We are in discussion with Brooke Berkowitz to hire as part of the Colliers team. We ask that this be removed from any public records.







Our team proposes the following account structure:

Alfie Hamilton

Executive Vice President

Russ Bornstein

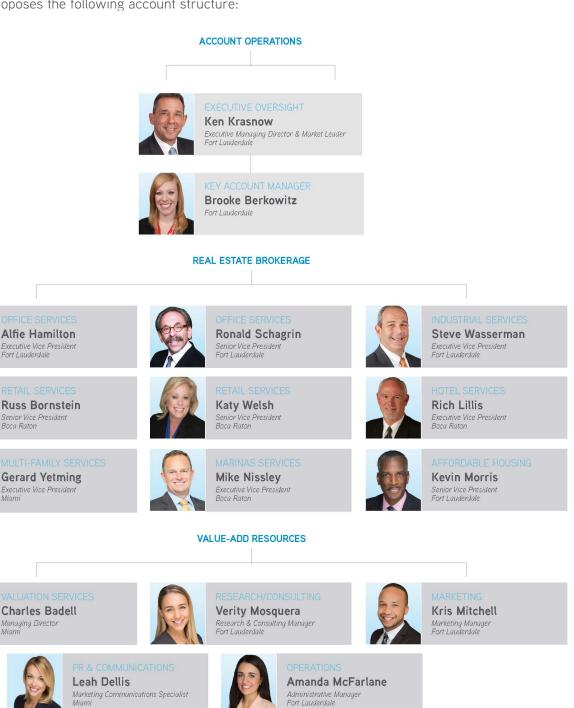
Senior Vice President Boca Raton

Executive Vice President

Charles Badell

Managing Director

Fort Lauderdale



Please see **Appendix A: Team Resumes** for the full qualifications of each team member.





### **EXPERIENCE**

 Provide details of past projects for agencies of similar size and scope, including information on your firm's ability to meet time and budget requirements.

The following confidential client examples represent some of the diverse clients and assignments Colliers is adapt at servicing.

### **SUCCESS STORY: City of Boston**

Colliers teams up with architecture firm Sasaki Associates to provide Real Estate Consulting Services to the City of Boston's Public Facilities Department.

### **CHALLENGE**

CITY of BOSTON The City of Boston's Public Facilities Department needed to relocate a 30,000 square foot community center within their portfolio but

was unsure of which location would be best-suited for both the center and the City. The single relocation study prompted the City to enlist Colliers to evaluate the remaining portion of the portfolio with the goal of rejiggering the portfolio to harvest value out of excess space, including vacant lots and empty space.

### **STRATEGY**

While Sasaki was engaged to provide design services, building programming recommendations for the new community center, Colliers was tasked with providing real estate context in support of its engagement. The Colliers team conducted a thorough study for the City of Boston, to address their future real estate situation and identify and analyze a range of high-level scenarios for consideration.

### SERVICES/RESULTS

As part of the ongoing study, Colliers will provide a detailed Alternative Location(s) Analysis, which includes findings on the availability and cost of alternative sites. The evaluation will include estimating the rough cost of each option for comparison purposes. Colliers will summarize its findings, including any other of observations that may be pertinent and will offer its recommendation to the City.

### **SUCCESS STORY: National Grid**

Colliers assists major energy provider with portfolio optimization to reduce footprint and increase efficiency.



### CHALLENGE

Our client, after a major acquisition which closed in August 2007, is now the 2nd largest utility in the United States. by customer numbers. the 2nd largest utility in the United States, by customer numbers.

As a result of the acquisition, our client selected us to evaluate their current footprint of operation centers to determine how to best consolidate into larger regional hub locations.







### **STRATEGY**

Our client's macro-objectives were as follows:

- > Reduction in space utilization, combined with cultural improvements through workspace design and standards
- > Improve quality of existing facilities
- > Enhance visibility and "presence" in critical locations
- > Ensure facilities meet or exceed environmental standards

### **SERVICES**

We implemented a 5-step optimization strategy that included:

- > Greenfield location study to optimize minimum number of sites required to meet client's response time goals
- > Evaluation of current facility conditions, including location, operational and physical characteristics
- > Development of prototype building design and space standards
- > Financial review and prioritization of potential solutions based on client's macro objectives
- > Implementation of new design standards and begin transaction process for NPV positive locations

### **RESULTS**

- > By utilizing a Greenfield approach, our client was able to identify potential savings of 29% in the number of required locations
- > Development of site prototypes resulted in the creation of company-wide design standards
- > Initially identified four projects that could result in NPV savings of almost \$20 million
- > As project is implemented, additional savings will be identified through reduction in required square footage and decrease in building cost/SF.

### **SUCCESS STORY: Houston Methodist Hospital**

Colliers successfully completes strategic portfolio evaluation and subsequent transaction execution for regional hospital group with 126 locations and the need for real estate realignment with business planning.



### **CHALLENGE**

Since 2001, Colliers International has provided a wide variety of healthcare real estate and advisory services to Houston Methodist Hospital.

One of the nation's leading health systems and academic medical centers, Houston Methodist consists of 126 locations including seven hospitals: Houston Methodist Hospital, its flagship academic hospital in the Texas Medical Center, and six community hospitals throughout the Greater Houston Metropolitan area. The system also includes freestanding emergency care centers and outpatient facilities as well as an extensive network of primary care doctors and specialists.





### **SERVICES**

Site Selection, Tenant Representation, Land Acquisition, Surplus Property Disposition, Property Management, Lease Administration, Consulting.

### **RESULTS**

The Colliers team worked closely with the hospital to develop an occupancy plan that would dispose of excess space and creatively acquire space in operational areas of growth for the hospital. This plan included:

- > Acquisition of 58.89 acres at Interstate 45 and State Highway 242 in The Woodlands, Texas for development of its Woodlands/North Houston Hospital Campus.
- > Acquisition of 86 acres at Interstate 10 and Barker Cypress Road in Houston, Texas, for development of its West Houston Hospital Campus.
- > Site selection and acquisition of six parcels for development of free-standing Emergency Department facilities throughout the Greater Houston area.
- > Tenant representation and lease advisory services for 13 locations for clinical and administrative operations totaling more than 104,000 square feet.
- > Disposition of the 288,000-square-foot San Jacinto Methodist Hospital Decker Campus.
- > Lease administration for more than 100 locations located throughout the Greater Houston market area.





### 4.2.4 APPROACH TO SCOPE OF WORK

1) Provide in concise narrative form, your understanding of the City's needs, goals and objectives as they relate to the project, and your overall approach to accomplishing the project.

Colliers International understands that the City seeks a qualified Real Estate Brokerage firm to provide professional services related to its portfolio of real property assets owned by the City of Fort Lauderdale. To meet the City's project objectives, Colliers International proposes to develop and execute a Strategic Plan that maximizes revenue generation to the City while striving to reduce operating costs through the following brokerage services:

- (i) A Strategic Plan with Recommendations on Leasing and Disposition
- (ii) Highest and Best Use Analysis of Existing Portfolio Analysis
- (iii) Valuation and Advisory Services
- (iv) Listing and Marketing Services for Sale of City Surplus Property
- (v) Overseeing Escrow for such sales
- (vi) Lease Management
- 2) Give an overview on your proposed approach, vision, ideas and methodology.

### **WEEK 1** | Kick-Off Session:

- Meet with the City to discuss existing strategy and confirm goals for new strategy.
- Review Colliers proposed scope of work and schedule, making adjustments where the City deems necessary.
- Introduce Colliers experts assigned to the project and respective roles and responsibilities.
- Identify point of contact and appropriate communication channels.
- Agree upon project deliverables.

### **WEEK 2-4** | Due Diligence for Strategic Plan

- Take an inventory of all City-owned and controlled property and identify current uses.
- Collect and collate appropriate documents and data necessary to complete the strategic plan, including but not limited to; a list of assets, operating statements, operating agreements, assessments, lease agreements, letters of interest (LOI), contracts, any other laws, policies or City-preferences that limit the lease or sale of City-owned assets.
- Meet with City departments and other internal and external stakeholders to ensure thorough understanding of City portfolio and assemble any missing pertinent information.







### **WEEK 5-12** | Strategic Plan and Valuation

- Review, assess and map all City-owned and controlled property, identifying the current use of each asset and detecting the vacant and underutilized surplus assets. Colliers will provide the City with access to GIS mapping software storing real-time information on City-owned property.
- Identify all real property that is appropriate for use as affordable housing, in accordance with Florida Statute 166.0451.
- Evaluate the underutilized or surplus assets which present an opportunity, with the following considerations:
  - Current use and potential/proposed use of asset
  - o Financials (debt, operating costs, maintenance costs)
  - o Condition of asset and deferred capital improvements
  - Current and projected market conditions (lease rates, sales prices, investment activity, supply, demand)
  - Legal or political encumbrances and/or preferences.
- Provide short- and long-term recommendations to the City on the highest and best-use of Cityowned vacant and underutilized assets, including an assessment of costs and revenue potential through sale or lease of each property.
- The recommendations for sale and/or lease will be rank ordered prioritizing those that further the City's goal of revenue generation in the shortest period of time.
- Outline a marketing plan for the expedited/streamlined disposition of the identified City-owned assets.

### **WEEK 12-15** | Delivery of Strategic Plan

- Present draft Strategic Plan report and meet with the City to review.
- Collect feedback from City staff and reflect comments and changes in the final report.
- Deliver final report no later than one hundred and eighty (180) days post commencement of the contract.
- Meet with the City to discuss and commence action on the final recommendations in the Strategic Plan.

### WEEK 15 Onwards | Marketing and Execution of the Strategic Plan

### Valuation and Advisory Services:

- Prepare and present quarterly updated reports of all identified City-owned surplus and underutilized sites, including escheated properties.
- Continue to prioritize opportunities for utilization or disposal, identifying which have the greatest opportunity to maximize revenue to the City in the shortest period of time.
- Present a quarterly market update to City staff highlighting local real estate trends and forecasts on the City of Fort Lauderdale real estate market.
- Application of "best practices" acquired through public sector real estate portfolio management and transaction experience.







### Marketing Services:

Once we have agreed upon the Strategic Plan and identified the assets for lease and/or disposition with asking prices and underwriting, our marketing department will draft best in class marketing materials, starting with a brochure, confidentiality agreement, and full offering memorandum for the City to review and approve. Colliers will maintain and update accurate listing information on the City's website.

Through our best in class marketing technology and our creative approach, we drive strong investor interest, while maintaining confidentiality and minimizing disruption to tenants. Our integrated marketing platform includes targeted marketing, broker/referral marketing, print and electronic media, mobile marketing, social media and inbound/outbound marketing techniques to ensure maximum exposure to the marketplace.

Our hands on, go-to-market strategy offers largescale exposure through proprietary databases and distribution channels, and includes a segmented approach to focus the highest impact marketing techniques on the buyers who are most motivated and likely to pay the highest price. Throughout the disposition process, our priority is revenue maximization for the City.

PR	E-MARKETING	PC	SITION	RE	VIEW	NE	GOTIATE	CL	.OSE
> >	Due Diligence for Assets Preparation of Exclusive Offering Memorandum Preparation of	> >	Local, Regional, National, International Distribute Offering Memorandums Face-to-Face	> >	Review all Letters of Intent Financial Modeling Review with Client & Solicitors	>	Consensus on Preferred Buyer Engage with Final Negotiation	>	Purchaser Due Diligence Closing
>	Flyer   E-blast Development Solicitors Legal Document Preparation	>	Meetings   Site Tours Follow up with Web Site Leads Broker Analysis						
>	Marketing   Positioning the Property	>	Prospective Buyer Critique						
>	Media Placement Targeting								

### Lease Management

Colliers' mission is to successfully deliver industry-leading lease management services that allow the City to optimize its real estate portfolio and all City license agreements, while providing an outstanding client experience. Colliers is technology agnostic in regards to lease administration, supporting ProLease, Axxerion,





Lease Harbor, Virtual Premise and all other commercially available programs. Our team will work with the City of Fort Lauderdale's existing database or lead an evaluation process to determine the optimal system to meet your individual needs.

### We track your entire real estate portfolio...

- > Owned Locations
- > Leased Locations
- > Your Subleases
- > Your Subtenants/Tenants

### ...to deliver the most potential benefits for the City

- > Never miss a critical lease date
- > We drive huge savings (One of the most important reasons clients choose Colliers)
- > Save weeks on budgeting real estate expenses
- Save time each month with automation of rent payments from database to your accounts payable system

OUR SERVICES - To be determined upon status of the City's existing Lease Management Systems

### Lease Administration & Document Management

The process of maintaining and tracking lease related documents is vital to our initial and on-going assessment of the status of every client location. Colliers' detail-oriented staff is highly-experienced in lease administration processes, which include the following on-going services:

- > All existing lease documents will be abstracted into the database (several options are available). We will continue to have all new lease and lease related documents abstracted into database by our Lease Abstractors.
- > Colliers has file maintenance procedures in effect and will maintain the lease files in an organized and standardized format. This process includes retention of historic data regarding lease issues, as well as CAM and tax reconciliation matters (this is crucial in the recovery process).
- > Colliers tracks all incoming lease documents by utilizing a document log which ensures that all documents are input and/or processed in a timely manner.
- > Colliers will scan, after logging, any legal documents received and post to the database/website within seven business days of receipt.
- > Reports Colliers is experienced in reporting processes and can distribute any number or form of the following reports on a recurring basis:
  - 1. Lease Payment Schedule (early and regular schedules)
  - 2. Square Footage Report
  - 3. Rent Roll Summary Portfolio wide
  - 4. Landlord Listing
  - 5. Expiration Reports
  - 6. CAM Tracking
  - 7. Abstracts Detail or summary listing of pertinent lease data by property







### Lease Administration & Document Management Checklist

- > Ability to customize current information (i.e., formatting, analysis of, etc.) and modify from time to time at client's discretion and within system abilities.
- > Follow protocol set up and provided by client for all ownership change requests that are received.
- > Review and research of landlord billings (rents, operating costs, utility usage, etc.) will be performed by Colliers to monitor accuracy and appropriateness prior to approving for payment; landlord invoices are directed to Colliers for verification and processing.
- > Desk audits of landlords' annual CAM/Insurance/Tax reconciliations against lease requirements will be performed, including review of prior year calculations where available. Colliers will utilize well developed forms and procedures as well as use all best efforts to acquire such reconciliations; process includes request of backup substantiating reconciliation as well as a resolution of any discrepancies, resulting in processing for payment.
- > During audit process, Colliers lease audit staff flags any invoices deemed excessive in comparison to industry standards. With prior approval from client, Colliers would address the anomalies/issues identified with the landlord and prepare the necessary argument and documentation to recover any potential funds. In the event Colliers cannot settle a dispute, the reconciliation will go to client's real estate department for review and direction.
- > Along with copies of all invoices, Colliers will submit a verified monthly lease payment schedule to client (setting out recurring rent payments and variable non-routine charges). This schedule will be formatted to coordinate with client's accounting system.
- > Colliers lease administration professionals will verify the figures in the payment schedule for accuracy and reasonableness with Colliers account manager approval; however, client is still responsible for reviewing each monthly schedule and remitting timely payment to their landlords/vendors unless Colliers is utilized to pay client's bills.
- > Colliers can work with client's risk management department/vendor as a liaison, assisting with landlord insurance certificate update requests, records upkeep and coordination.
- > For post-lease setup ongoing maintenance, Colliers assigns a dedicated analyst responsible for ensuring that portfolio information is continuously updated and that established processes are followed. Moreover, the account analyst will ensure that all critical lease dates are evaluated in a timely fashion and that staff is alerted to take appropriate action.
- > Second review controls are in place for review of lease payment schedules and CAM/tax reconciliations, with SOX guidelines in mind.

Our enterprising platform allows us to develop custom-designed solutions to meet the City's business and real estate needs while adhering to the standardized processes demanded by applicable regulatory and statutory guidelines.







### 3) Describe your proposed approach to the project, including scheduling methodology (time line) for effectively managing and executing the work in the optimum time.

Please refer to the approach above for information on timeline and scheduling.

### 4) Provide information on your firm's current workload and how this project will fit into your workload.

Colliers believes in delivering services through a single point of accountability with responsible executive oversight and specialized resources available across the delivery structure. Therefore, **Key Account Manager Brooke Berkowitz will be 100% dedicated to this account,** and ensure the City receives consistent and responsive services throughout the term of the contract.

While our core team is active in the community and with existing clients, this account will receive our utmost attention and we have implemented the team structure to ensure best-in-class service. As illustrated in Section 4.2.3, the Key Account Manager will be supported by a team of experienced brokerage professionals and subject matter experts who will focus on developing the strategic direction of their expertise area in parallel with the overall account strategy and goals. This process allows Colliers to seamlessly manage the entire real estate process - from strategic planning, due diligence, transaction management and execution – without risk of conflict from existing workload.

### 5) Describe available facilities, technological capabilities and other available resources you offer for the project.

We offer a wide range of value-add products and services related to market research, valuations, strategic planning and property marketing, from the straightforward (signage, advertising, fliers) to the sophisticated (positioning campaigns, tours, websites). We pride ourselves on looking beyond the obvious to develop a unique, creative marketing strategy that speaks to the benefits of your specific assets and its value to the end user while tailoring our approach to the City's regulations and expectations.

### **Government Solutions Group**

Colliers International understands the complexity of the government real estate sector. The government's procedures for acquiring, managing and disposing of real property are subject to layers of regulations, policy, legislation and executive orders. Making sense of it all can be challenging, but Colliers' Government Solutions team understands how to chart a path to successful execution. In everything we do, we apply a team approach, leveraging the depth and experience of Colliers' large and diverse global platform.

Colliers Government Solutions understands government acquisition regulations and the strict performance requirements of the federal lease form. Our team does more than just execute transactions – we pride ourselves on ensuring each lease's long-term integrity. We stay abreast of all changes in government policy and procedure to advise our clients how to plan, budget, and position their properties to attract and retain





federal tenants. Our mission is to provide integrated services that maximize property value and exceed our clients' investment objectives.

To yield the highest value and best deal execution Colliers Government Solutions offers GSAXCHANGE, a team of sales professionals specializing solely in the sale of government-leased properties. The GSAXCHANGE team accelerates clients' success by providing a deep understanding of factors associated with government-leased real estate, utilizing local market knowledge and leveraging Colliers' national presence. Our business strategy is geared to the acquisition and sale of government-leased properties nationally providing marketing exposure to thousands of government property owners and investors throughout the United States and overseas.

### Valuation Services

Real estate appraisals play a pivotal role in today's business climate. Colliers Valuation & Advisory Services' reports are designed to deliver insight into a property's fundamentals, its competition and the overall market dynamics affecting value. Our commitment to high-end client service, coupled with Colliers International's unparalleled market intelligence and resources continues to differentiate us as the firm of choice in the real estate industry. With its unique and expanding platform, Colliers provides a full range of expertise across all commercial property types and has experience on working on appraisals tailored to the unique features of government-leased properties. Our professionals share a commitment to deliver the highest level of service and the best client experience possible. We go the extra mile to deliver results, whether this means meeting a tight deadline, working with a complex and challenging property or delivering consistent results when valuing nationwide portfolios.

All of our appraisals are evaluated and approved by an experienced review team to ensure our clients receive clear, concise, and timely appraisals. Because we recognize that superior technology is not enough, our managers and professionals stand committed to our clients' success and will go the extra mile to provide exceptional customer service.

### Research and Consulting Services

Headed up by the Research and Consulting Manager, Verity Mosquera, located in the Fort Lauderdale office, the local research team provides timely, reliable data critical to making effective and well-informed real estate portfolio decisions. We consider our primary market research a competitive advantage, providing clients with data, analysis and consultation on industry trends, comparable lease and sales transactions, and economic data critical to making effective real estate decisions. Colliers Research also maintains an extensive tenant database identifying industry, location, square footage occupied, and lease expiration dates. Stacking plans and building skylines are regularly produced to illustrate the location and lease expiration of tenants in select buildings. Additional analytic tools track tenant demand and lease activity on a real-time basis.

Consulting Services include:

- > Strategic Real Estate Planning
- > Feasibility Studies
- > Asset Evaluations/Highest-and-Best Use Studies







- > Due Diligence Reports
- > Market Studies
- > Financial Analyses

### **GIS Capabilities**

Colliers has full-service geographic consulting and mapping, offering tailored analysis for clients as they develop their portfolio strategies. We provide cartographic, demographic, and analytic products and services. Our deliverables vary from simple aesthetic maps to complex geographic analysis and site selection packages. Our demographic analysis provides answers to complex questions and adds tangible value to real estate transactions. Our goal is to provide the highest level of innovative GIS products and solutions with a strong focus on customer service and consultation.

### **Marketing Services**

With an in-house creative services team spearheaded by project team member Kristopher Mitchell, the Colliers team will work with the City to develop customized, compelling collateral in support of the real estate strategy or strategies selected.

With the primary goal to build smart awareness and educate through tailored marketing, the team may utilize a range of marketing tools, including but not limited to:

- > Property Brochure
- > Mapping
- > Signage
- > Email Marketing
- > Offering
- > Social Media Campaign

### **Public Relations**

Our in-house Communications Specialist, Leah Dellis, has teamed up with our trusted South Florida-based public relations partner, Top of Mind PR, on an array of strategic media initiatives to maximize smart exposure and coverage on behalf of our clients. Top of Mind PR is a woman-owned public relations firm with top-tier media relationships and has a working relationship with Colliers South Florida, independent of any potential contract with the City.

While the project team fully acknowledges and agrees to Section 2.31 "News Release/Publicity" in the Bid regarding communications, our team would include recommendations to the City for ways to curate and position key messaging to media resources. By initiating the conversation, our team is able to shape the image of the property while creating awareness to the intended audience.





### 4.2.5 REFERENCES

CLIENT: Jacksonville 1	ransportation Authority (JTA)
Address:	121 W. Forsyth Street, Suite 300 Jacksonville, FL 32202
Contact:	Michael Corbitt   Real Estate Project Officer
Telephone:	+1 904 632 5257
E-mail:	mcorbitt@jtafla.com
Description of Work:	Real Estate Consulting and Disposition of surplus properties in JTA portfolio, including vacant land, office buildings and parking garages.
Year:	2016-Ongoing
Total Cost of Project:	\$60 Million+ in potential disposition of surplus properties and growing

CLIENT: Nova Southe	astern University (NSU)
Address:	3301 College Avenue Davie, FL 33314
Contact:	Marc Crocquet   Vice President
Telephone:	+1 954 262 8842
E-mail:	crocquet@nsu.edu
Description of Work:	Ongoing leasing assignment led by team member Ronald Schagrin at the Nova Southeastern University's (NSU) Center for Collaborative Research (CCR), one of the largest and most advanced research facilities in Florida.
Year:	2016-Ongoing
Total Cost of Project:	\$80 million Estimated / \$80 million Actual





CLIENT: Midgard Grou	Р
Address:	1475 W Cypress Creek Road, Suite 202 Fort Lauderdale, FL 33309
Contact:	James Goldstein   President & General Managing Partner
Telephone:	+1 954 771 6714
E-mail:	jim@midgardgroup.com
Description of Work:	<ul> <li>Long-term strategic relationship with Midgard Group on multiple projects.</li> <li>Responsible for leasing 450,000 square feet in six buildings as part of an office campus in Cypress Creek.</li> <li>On behalf of same owner, marketing an entire block on Biscayne Boulevard (between 17<sup>th</sup> and 18<sup>th</sup>) in Miami for \$85 million</li> <li>Working with the ownership for the development of a 140,000 square foot industrial park in Cypress Creek. Have assisted in the design, layout and pricing for this potential new industrial park.</li> </ul>
Year:	1999-Ongoing
Total Cost of Project:	<ul> <li>\$60 million estimated value of the business campus</li> <li>\$85 million asking price for the land in Miami</li> <li>\$140 million estimated for the construction of the industrial park</li> </ul>

CLIENT: East Group	
Address:	2996 Commerce Park Drive Orlando, FL 32819
Contact:	Chris Segrest   Vice President
Telephone:	+1 407 284 6535
E-mail:	chris.segrest@eastgroup.net
Description of Work:	Landlord Representation by project team member Steve Wasserman for East Group's Lockhart Business Park, 5600 NW 12 Avenue in Fort Lauderdale (120,000 square foot office / warehouse)
Year:	2010-Ongoing
Total Cost of Project:	\$3.6 million





### 4.2.6 M/WBE PARTICIPATION

• Describe your company's efforts, as well as planned efforts, in meeting M/WBE procurement goals under Florida Statutes 287.09451.

While Colliers itself is not a certified minority business enterprise as defined by the Florida Small and Minority Business Assistance Act of 1985, we recognize the importance of engaging Minority and Women-Owned (M/WBE) partners and vendors to ensure the very highest level of service, particularly with regard to projects of large scale and complexity.

Our firm supports initiatives to tangibly increase M/WBE participation in both contracting and procurement activities and can establish specific participation goals with each client. Colliers attempts to utilize the services of qualified DBE/MBE/WBE suppliers and subcontractors whenever possible. These vendors are held to the same high standards and qualifications of all our best-in-class subcontractors and partners, yet are comprised of the same diverse ethnic and gender composition we strive to maintain in our core business.

Provided below is a sample of the MBE/WBE/VBE firms Colliers has partnered with:

- > Top of Mind PR
- > WIRE Property Group
- > CSA Group
- > Pathfinder Engineers & Architects, LLP
- > Elana, Inc. Construction Consultants
- > Miyakoda Consulting
- > Leapley Construction Group
- > LCG-CI Project Management Services, LLC
- > Madison Square Realty
- > Robert Louis Group

Our company is consciously and proactively inclusive of all areas of diversity including race, ethnicity, color, national origin, ancestry, gender, sexual orientation, religion, age, socioeconomic status, marital status, language, disability or immigration status. Our anti-discrimination policy, global and local human resources teams, and FirstLine, a confidential reporting hotline, work together to create a positive and inclusive work environment for all of our staff members, partners and vendors.





### 4.2.7 SUBCONTRACTORS

• Proposer must clearly identify any subcontractors that may be utilized during the term of this contract.

Acknowledged. Colliers has assembled a team to perform the scope of services in-house but will identify any subcontractors to be utilized should this change in any way.





### 4.2.8 REQUIRED FORMS

The required forms are included in the order listed on the following pages:

- A. PROPOSAL CERTIFICATION
- B. COST PROPOSAL
- C. NON-COLLUSION STATEMENT
- D. LOCAL BUSINESS PREFERENCE
- E. CONTRACT PAYMENT METHOD
- F. SAMPLE INSURANCE CERTIFICATE
- G. CERTIFICATE OF AUTHORITY TO BIND COLLIERS INTERNATIONAL

### **BID/PROPOSAL CERTIFICATION**

<u>Please Note:</u> If responding to this solicitation through BidSync, the electronic version of the bid response will prevail, unless a paper version is clearly marked **by the bidder** in some manner to indicate that it will supplant the electronic version. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state,

in accordance with Florida Statute §607.1501 (visit http://www.dos.state.fl.us/).

Colliers International Company: (Legal Registration) 200 East Broward Boulevard Suite 120 Address: Fort Lauderdale FL 33301 State: Email: Ken.Krasnow@colliers.com 954-652-4600 954 652 4637 FAX No. Telephone No. Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): Total Bid Discount (section 1.05 of General Conditions): Does your firm qualify for MBE or WBE status (section 1.09 of General Conditions): MBE WBE ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal: Addendum No. Date Issued Addendum No. **Date Issued** Addendum No. Date Issued <u>VARIANCES</u>: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A. If submitting your response electronically through BIDSYNC you must also click the "Take Exception" button.

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Ken Krasnow

Name (printed)

4 28 12017

Date:

Signature

Executive Managing Director & Market Leader

Title

### **SECTION VI - COST PROPOSAL PAGE**

Proposer Name: Collier International South Fronda, LLC
Proposer agrees to supply the products and services at the prices bid below in accordance with the terms, conditions and specifications contained in this RFP.
Cost to the City: Contractor must quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.
Notes:
Attach a breakdown of costs including but not limited to labor, equipment, materials and parts.
1. Proposed commission percentage as defined in Section III
2. Proposed lease cost percentage as defined in Section III
3. Hourly rate for advisory services where commission is not earned \$ (The estimated number of hours the city expects to utilize these services is 500 hours per year. The hours may vary depending on the need of the city.)
Failure to use the City's COST PROPOSAL Page and provide costs as requested in this RFP, may deem your proposal non-responsive.
Submitted by:    Ken Krasnow   Signature   Signature
Date Executive Managing Director  Title

### **NON-COLLUSION STATEMENT:**

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

- 3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).
- 3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

	NAME -	RELATIONSHIP	<u>S</u>
N/A		N/A	
N/A		N/A	
		N/A	
		N/A	

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

SIGNATURE IIII IIII

### LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local BUSINESS preference classification as indicated herein, and further certifies and agrees that it will re-affirm it's local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

(1)		Business Name	is a Class A Business as defined in City of Fort Lauderdale Ordinance Not 12-04, Sec.2-199.2. A copy of the City of Fort Lauderdale current yet Business Tax Receipt <u>and</u> a complete list of full-time employees a evidence of their addresses shall be provided within 10 calendar days of formal request by the City.	ear and
(2)	Со	olliers International Business Name	is a Class B Business as defined in the City of Fort Lauderdale Ordinance C-12-04, Sec.2-199.2. A copy of the Business Tax Receipt or a complete lis full-time employees and evidence of their addresses shall be provided wit 10 calendar days of a formal request by the City.	st of
(3)	appring dispersion and	Business Name	is a Class C Business as defined in the City of Fort Lauderdale Ordinance C-12-04, Sec.2-199.2. A copy of the Broward County Business Tax Recesshall be provided within 10 calendar days of a formal request by the City.	
(4)		Business Name	requests a <b>Conditional Class A</b> classification as defined in the City of Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of int shall be provided within 10 calendar days of a formal request by the City.	
(5)		Business Name	requests a <b>Conditional Class B</b> classification as defined in the City of Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of interest shall be provided within 10 calendar days of a formal request by the City.	
(6)		Business Name	is considered a <b>Class D</b> Business as defined in the City of Fort Lauderd Ordinance No. C-12-04, Sec.2-199.2. and does not qualify for Loc Preference consideration.	
BIDDER'	S COMF	PANY: Colliers Interno	ational	
AUTHO COMPA PERSO	NY	Ken Krasnow	flu Clus 4/28/20	17
LINGO		NAME	SIGNATURE DATE	
				×



### CITY OF FORT LAUDERDALE BUSINESS TAX YEAR 2016-2017

**BUSINESS TAX DIVISION** 100 N. Andrews Avenue, 1st Floor, Fort Lauderdale, Florida 33301 (954) 828-5195

Business ID: 1601774

200 E BROWARD BLVD # 120

Business Address: 200 \_ ONLY

746421 Tax#:

Tax Category:

Fee:

COLLIERS INTERNATIONAL S FLORIDA AMANDA MCFARLANE ADM MGR 200 E BROWARD BLVD # 120 FORT LAUDERDALE, FL 33301

### \*\*\*DETACH AND POST THIS RECEIPT IN A CONSPICUOUS PLACE\*\*\*

Business ID:

1601774

Tax Number:

746421

Business Name: COLLIERS INTERNATIONAL S FLORIDA

Business Address: 200 E BROWARD BLVD # 120

Business Owner: MCFARLANE, AMANDA ADM MGR

- This Receipt is issued for the period commencing October 1st and ending September 30th of the years shown above.
- If you have moved out of the city, please provide a written statement.
- A transfer of business location within the city limits is subject to zoning approval. Please complete a Business Tax Transfer Application and bring it to our office to obtain the necessary approval.
- A Transfer fee applies of 10% of the annual business tax fee. The fee shall not be less than \$3.00, nor greater than \$25.00.
- If you have sold your business, please provide us with a copy of the Bill of Sale.

Please be advised that this issuance of a Business Tax Receipt establishes that the business you intend to conduct is a use permitted by the City Zoning Code for the location at which you intend to operate. The issuance of a Business Tax Receipt in no way certifies that the property located at this address is in compliance with other provisions of the City Code of Ordinances.



### CITY OF FORT LAUDERDALE BUSINESS TAX YEAR 2016-2017

**BUSINESS TAX DIVISION** 100 N. Andrews Avenue, 1st Floor, Fort Lauderdale, Florida 33301 (954) 828-5195

Business Name: KRASNOW, KENNETH M
Business Address: 200 E BROWARD BLVD # 120
Tax Category: 746434

Fee:

KRASNOW, KENNETH M COLLIER INTERNATIONAL S FLORIDA 200 E BROWARD BLVD # 120 FORT LAUDERDALE, FL 33301

### \*\*\*DETACH AND POST THIS RECEIPT IN A CONSPICUOUS PLACE\*\*\*

Business ID:

Tax Number:

1601786 746434

Business Name: KRASNOW, KENNETH M
Business Address: 200 E BROWARD BLVD # 120

Business Owner: KRASNOW, KENNETH M

- This Receipt is issued for the period commencing October 1st and ending September 30th of the years shown above.
- If you have moved out of the city, please provide a written statement.
- A transfer of business location within the city limits is subject to zoning approval. Please complete a Business Tax Transfer Application and bring it to our office to obtain the necessary approval.
- A Transfer fee applies of 10% of the annual business tax fee. The fee shall not be less than \$3.00, nor greater than \$25.00.
- If you have sold your business, please provide us with a copy of the Bill of Sale.

Please be advised that this issuance of a Business Tax Receipt establishes that the business you intend to conduct is a use permitted by the City Zoning Code for the location at which you intend to operate. The issuance of a Business Tax Receipt in no way certifies that the property located at this address is in compliance with other provisions of the City Code of Ordinances.

> **BUSINESS TAX DIVISION** 100 N. Andrews Avenue, 1st Floor, Fort Lauderdale, Florida 33301 TEL (954)828-5195 FAX (954)828-5881 WWW.FORTLAUDERDALE.GOV

## **BROWARD COUNTY LOCAL BUSINESS TAX RECEIPT**

115 S. Andrews Ave., Rm. A-100, Ft. Lauderdale, FL 33301-1895 – 954-831-4000 VALID OCTOBER 1, 2016 THROUGH SEPTEMBER 30, 2017

DBA:
Business Name: COLLIERS INTERNATIONAL SOUTH

Business Type: (REAL ESTATE BRANCH OFFICE Receipt #: 318-283452
CORP/COMPNY/BROKER

Business Location: 200 E BROWARD BLVD STE 120 Owner Name: COLLIERS INTERNATIONAL SOUTH FLORIDA Business Opened:11/25/2014 State/County/Cert/Reg:BO2030083

FT LAUDERDALE

Business Phone: 954 652 4600

Rooms

Seats

Employees 15

Exemption Code:

Machines

**Professionals** 

	Number of Machines:			Vending Type:		
Tax Amount	Transfer Fee	NSF Fee	Penalty	Prior Years	Collection Cost	Total Paid
45.00	0.00	0.00	11.25	0.00	25.00	81.25

# THIS RECEIPT MUST BE POSTED CONSPICUOUSLY IN YOUR PLACE OF BUSINESS

THIS BECOMES A TAX RECEIPT

WHEN VALIDATED

and zoning requirements. This Business Tax Receipt must be transferred when the business is sold, business name has changed or you have moved the This tax is levied for the privilege of doing business within Broward County and is non-regulatory in nature. You must meet all County and/or Municipality planning business location. This receipt does not indicate that the business is legal or that

### **CONTRACT PAYMENT METHOD BY P-CARD**

### THIS FORM MUST BY SUBMITTED WITH YOUR RESPONSE

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to payment by credit card via MasterCard or Visa. This allows you as a vendor of the City of Fort Lauderdale to receive your payment fast and safely. No more waiting for checks to be printed and mailed.

Payments will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, firms must presently have the ability to accept credit card payment or take whatever steps necessary to implement acceptance of a credit card before the commencement of a contract.

Please indicate which credit card payment	you prefer:
☐ Master Card	
■ Visa Card	
Company Name: Colliers International	
Ken Krasnow Name (Printed)	Signature
4/28/2017	Executive Managing Director & Market Leader
Date:	Title



### CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 04/10/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

COVERACES	CEDTIFICATE MILIMPED, 49581483		DI	EVISION NUMBED:			
Palm Beach Gardens, FL 3341	8	INSURER F:					
		INSURER E:					
4500 PGA Blvd. #110	A Blvd. #110		INSURER D:				
olliers International South Florida, LLC		INSURER C: Chubb Insurance Company of Canada					
INSURED		INSURER B : Chubb	Insurance Co	ompany			
Toronto, Ontario M5L 1E8		INSURER A. Liber	ty Internation	onal Underwriters			
199 Bay Street		INSURER(S) AFFORDING COVERAGE NAIC #					
Suite 4800				tegrogroup.com			
Integro (Canada) Ltd.		PHONE (A/C, No. Ext): 604 -	608-6255	FAX (A/C, No):			
PRODUCER	1-416-619-8000	CONTACT NAME: Vane	ssa Chapin				
tina oci tinoate aoca not conici i	ights to the certificate floraer in fied of s	don chaorsement	(3).				

COVERAGES	CERTIFICATE NUMBER: 49581483	REVISION NUMBER

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

	XCLUSIONS AND CONDITIONS OF SUCH P						
INSR LTR	TYPE OF INSURANCE	ADDL SUBF	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMIT	s
A	X COMMERCIAL GENERAL LIABILITY		TB1-B71-171197-016	12/01/16	12/01/17	EACH OCCURRENCE	\$ 1,000,000
	CLAIMS-MADE X OCCUR					DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000
						MED EXP (Any one person)	\$ 10,000
	8					PERSONAL & ADV INJURY	\$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:					GENERAL AGGREGATE	\$ 2,000,000
	POLICY PRO- JECT LOC					PRODUCTS - COMP/OP AGG	\$ 1,000,000
	OTHER:						\$
В	AUTOMOBILE LIABILITY		16-7359-06-03	12/01/16	12/01/17	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
	ANY AUTO					BODILY INJURY (Per person)	\$ 1,000,000
	OWNED SCHEDULED AUTOS ONLY AUTOS					BODILY INJURY (Per accident)	\$ 1,000,000
	HIRED X NON-OWNED AUTOS ONLY					PROPERTY DAMAGE (Per accident)	\$ 1,000,000
1							\$
С	X UMBRELLA LIAB X OCCUR		79713858	12/01/16	12/01/17	EACH OCCURRENCE	\$ 1,000,000
	EXCESS LIAB CLAIMS-MADE					AGGREGATE	\$ 1,000,000
	DED RETENTION\$						\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY					PER OTH- STATUTE ER	
	ANYPROPRIETOR/PARTNER/EXECUTIVE [ ]	N/A				E.L. EACH ACCIDENT	\$
	(Mandatory in NH)	N/A				E.L. DISEASE - EA EMPLOYEE	\$
	If yes, describe under DESCRIPTION OF OPERATIONS below					E.L. DISEASE - POLICY LIMIT	\$
С	Crime		8132-4965	12/01/16	12/01/17		2,000,000
		1					

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Certificat Holder, The City of Fort Lauderdale, is included as an additional insured where required by written contract Contractual liabilty is applicable on liability policies where required by contract.

Insurer(s) will endeavor to provide 30 days notice of cancellation and 10 days notice in the event of non-renewal.

CERTIFICATE HOLDER	CANCELLATION			
City of Fort Lauderdale Procurement Services Division	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
100 N. Andrews Avenue, Room 619	AUTHORIZED REPRESENTATIVE			
Fort Lauderdale, FL 33301				

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### SECRETARY'S CERTIFICATE OF COLLIERS INTERNATIONAL SOUTH FLORIDA, LLC

### THE UNDERSIGNED hereby certifies as follows:

1. I am the Secretary of Colliers International South Florida, LLC (hereinafter referred to as the "Company"), a limited liability company organized and existing under the laws of the State of Delaware and, as such, have knowledge of the matters hereinafter certified to.
2. As at the date hereof, Kenneth M. Krasnow is the duly appointed Vice Presiden and Broker in Charge of the Company and is duly authorized to perform in such office the duties assigned to him from time to time by the board of managers of the Company, including withou limitation, the execution of requests for proposal for and on behalf of the Company.
I am providing this Certificate in my capacity as the Secretary of the Company and not in my personal capacity and no personal liability is assumed by me in connection with giving this Certificate.
IN WITNESS WHEREOF I have signed this Certificate as of the 18th day of April, 2017.
By:

# APPENDIX A



# Ken Krasnow

EXECUTIVE MANAGING DIRECTOR & MARKET LEADER Colliers International | South Florida



ken.krasnow@colliers.com

#### **QUALIFICATIONS**

Licensed Real Estate Broker State of Florida and New York

# AFFILIATIONS OR MEMBERSHIPS

**NAIOP** 

**CREW** 

International Council of Shopping Centers (ICSC)

Urban Land Institute (ULI)

Beacon Council - Miami

Business Development Board of Palm Beach County

Board Member - Friends of the Underline

Corporate Advisory Board - Debbie's Dream Foundation

#### **CONTACT DETAILS**

DIR +1 786 517 4990 MOB +1 914 589 5321

Colliers International South Florida, LLC 801 Brickell Avenue Suite 850 Miami, FL 33131

www.colliers.com

#### AREA OF EXPERTISE

Ken Krasnow serves as Colliers Executive Managing Director for the South Florida region. In the role of Market Leader, he is responsible for all operations for the five Colliers offices in Miami-Dade, Broward and Palm Beach County. He is also responsible for broadening the company's platform by developing key client relationships, leading major projects and transactions, maintaining senior real estate industry and political relationships and recruiting new talent. Ken brings over 30 years of acclaimed expertise in the commercial real estate industry, offering an exceptional level of on-the-ground market knowledge.

Ken began his career as a commercial leasing broker and was responsible for more than three million square feet of Class A building agencies in New York City. His knowledge of brokerage and hands-on approach to management makes him an invaluable member of the Colliers team. In today's South Florida market, he will continue to leverage his level of expertise to accelerate our success in the region.

# BUSINESS AND EDUCATIONAL BACKGROUND

Prior to joining Colliers, Ken served as Managing Director overseeing all operations for CBRE in South Florida. While at CBRE, he recruited almost 40 sales professionals who were responsible for an additional \$40 million in revenue. During his tenure, revenues and profits for his region more than doubled. Prior to joining CBRE in Florida, Ken held executive positions for Cushman &

Wakefield in the New York City area and Trammell Crow Corporation. Ken served at Cushman & Wakefield for 18 years during which time he oversaw the New York area profit center where he brought his region back to record revenues of approximately \$200 million after the tragic events of September 11, 2001.

Ken attended Emory University where he earned his Bachelor of Administration in Finance. He also attended New York University for Graduate Real Estate studies.

#### PROFESSIONAL ACCOMPLISHMENTS

- Listed as one of "Top 50 Leaders in Commercial Real Estate" by Real Estate Weekly
- Named "Power Leader" by South Florida Business Journal
- Named on of Real Estate New York's "Top 40 Under 40"
- Recognized as one of the "Next Great Leaders" by Real Estate Forum
- Recipient of the Percy Douglass Award by Friends of Island Academy
- Winner of the Royal Poinciana Community Leadership award by Debbie's Dream Foundation



# Brooke Berkowitz

KEY ACCOUNT MANAGER



TRADE SECRET: We are in discussion with Brooke Berkowitz to hire as part of the Colliers team. We ask that this be removed from any public records.

#### **EDUCATION**

BS, 2005, Marketing and Real Estate

#### **REGISTRATIONS**

Florida Real Sales Associate, No. SL3209543

#### **CONTACT DETAILS**

Colliers International South Florida, LLC 200 East Broward Boulevard Suite 120 Fort Lauderdale, FL, 33301

www.colliers.com

#### AREA OF EXPERTISE

Acting as the City's primary point of contact will be Key Account Manager Brooke
Berkowitz, who has proven experience
leading strategic accounts within the public sector. As a fully-dedicated resource to the City, Brooke will work closely with the full Colliers team to custom-tailor a set of integrated services selected from the firm's range of business lines. This approach allows Colliers to streamline communications and for the City to benefit from the most responsive, customized and nimble real estate solutions.

#### **BUSINESS AND RELEVANT EXPERIENCE**

Ms. Berkowitz currently serves as an Acquisition & Relocation Agent for projects in Miami-Dade, Broward and St. Lucie Counties. The projects encompass acquisition, relocation and property management of various parcels. Ms. Berkowitz manages the acquisition of commercial and residential properties for public purposes, and provides direct advisory services and relocation assistance to diplaced occupants. She also coordinates with owners, tenants, attorneys, contractors, appraisers, realtors, and local government officials in negotiating to purchase right of way and relocate residents using various channels of communication. Ms. Berkowitz prepares and conducts complex property negotiations and suit information for filing and comdemnation proceedings.

Ms. Berkowitz has nearly 10 years of right-of-way experience, providing acquisition, relocation, and property management for South Florida. She completed FDOT's Right-of- Way Training Program in 2008 at FDOT District 4. After completing the program, she spent 4 years working for FDOT District 6 in right-of-way. From 2014-2015, Brooke was a member of the CBRE South Florida Occupier team. She was an integral part of the City of Fort Lauderdale's account management team which was responsible for the execution of the City of Fort Lauderdale's strategic plan. This includes the evaluation, disposition, repurposing and management of the City's 700+ leased and owned assets. Brooke also worked with the Public Institution Group representing Martin County and Riviera Beach Community Redevelopment Agency.

Before joining the Occupier team, Brooke was a member of CBRE's Florida Business Operations Team as a Transaction Coordinator handling the Palm Beach Market. Brooke began her career at CBRE in 2012 as the South Florida Listing Coordinator.

#### COMMUNITY INVOLVEMENT

Brooke holds a position on the Board of Young Professionals for Covenant House Fort Lauderdale. She is actively involved in the planning of various events in support the Covenant House mission to support homeless youth.



# Alfie Hamilton

EXECUTIVE VICE PRESIDENT
Colliers International South Florida



alfie.hamilton@colliers.com

#### **QUALIFICATIONS**

Florida Real Estate License

# AFFILIATIONS OR MEMBERSHIPS

NAIOP South Florida Chapter, Board of Directors

South Florida Office Brokers Association (SFOBA)

#### **CONTACT DETAILS**

DIR +1 954 453 6050 FAX +1 954 727 9338

Colliers International 200 E Broward Blvd., Suite 120 Fort Lauderdale, FL 33301

www.colliers.com

#### AREA OF EXPERTISE

Alfie Hamilton is a veteran of the commercial real estate industry. He is an office leasing specialist who focuses primarily on landlord / agency assignments for institutional clients.

Alfie is known for providing advisory services to his clients and for successfully structuring complex transactions. By earning the trust of his clients, his leasing portfolio has expanded steadily since 2007 and now totals approximately 1.2 million square feet.

# BUSINESS AND EDUCATIONAL BACKGROUND

A member of the board of directors of NAIOP's South Florida chapter and the South Florida Office Brokers Association. Before joining Colliers, he was an Executive Vice President for Pointe Group Advisors for 8.5 years and played an instrumental role in transforming the firm from a property management company into a full service commercial real estate firm.

- 2015 Colliers Everest Club inducteee. The Everest Club recognizes the preformers in the top 10th percentile in Brokerage, Valuation and Corporate Solutions across the Americas.
- 2015 & 2014 NAIOP South Florida Office Broker of the Year Finalist
- In 2015, represented the owner in the sale of a fourbuilding, 247,000 SF suburban office portfolio in Sarasota, FL.
- Completed leases representing more than 1.7 million square feet with a transaction value in excess of \$190 million.

# LANDLORD REPRESENTATIVE EXPERIENCE

- 6 Building Broward Suburban Office Portfolio - 409,736 RSF
- Gateway Professional Center
   247.530 RSF
- 3 Building St. Petersburg Suburban
   Office Portfolio 239,170 RSF
- 200 East Broward
  - 225,650 RSF
- Northern Trust Plaza 110,204 RSF

#### TOP TRANSACTIONS

- TA Realty Gateway Professional Center
   SALE -247,530
- Continental Citrus Corp. Pointe West Plaza - SALE PENDING -110,204
- General Dynamics 80,057
- General Dynamics 67,259
- Triad Digital Media 64,634
- Balfour Beatty Construction 39,864
- eMason 40,647
- Bar Education (Southeastern College / Kaiser) -35,863
- Jackson Hewitt -33,645
- Northern Trust Company -32,349
- Management Health Systems d/b/a MedPro - 30,177
- Global Financial Private Capital 27,186
- Solstice Benefits- 27,178
- Citrus Healthcare 20,665
- JAJ Holding 20,000



# Ronald A. Schagrin sior

SENIOR VICE PRESIDENT
Colliers International
National Life Sciences Group Member
Healthcare Services Group Member



ronald.schagrin@colliers.com

#### **QUALIFICATIONS**

Florida Real Estate License

Florida Real Estate Salesman License

Society of Industrial and Office Realtors (SIOR)

# AFFILIATIONS OR MEMBERSHIPS

South Florida Office Brokers Association (SFOBA)

Society of Commercial Realtors (SOCR)

National Associate of Realtors (NAR)

National Life Science Member

National Healthcare Services Member

#### **CONTACT DETAILS**

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#### AREA OF EXPERTISE

Ron Schagrin is a 30-year commercial real estate veteran in sales and leasing of Downtown and Suburban office and industrial properties. His knowledge and expertise of all real estate industry services is an invaluable asset to the organization in coordinating and implementing marketing proposals, including budgets for institutional and entrepreneurial clients, market research, and investment ventures.

#### PROFESSIONAL ACCOMPLISHMENTS

- Costar Power Broker 2002 2006; 2008
   2011
- Chairman's Circle Prudential Commercial Real Estate – 2007, 2008
- Top Producer Coldwell Banker
   Commercial 1999
- Top 3 Producers Colliers Lehrer 1998
- NAIOP Award of Excellence Design Build Industrial Over 50,000 SF - 1996
- Best Real Estate Deal of the Year E & Y
   Kenneth Leventhal Best New
   Development 1995
- South Florida Business Journal "Best Real Estate Deal of the Year" for Best New Development Industrial
- Recipient of the JC Penney "Golden Rule" Award in 1995
- Recognized for his service to the community and ran the Olympic Torch in 1996 as a "Community Hero"

# BUSINESS AND EDUCATIONAL BACKGROUND

Ron was a founding partner in Commercial Property Realty Advisors, a full service real estate firm that operated for nine years, which later became Commercial Property Realty Group. He served as Senior Vice President at Prudential CRES Commercial Real Estate South Florida. His commercial real estate career began at Colliers International South Florida where when he left in 2001 he served as Senior Director. Prior to commercial real estate he was active in a publically traded company, Schagrin's Wine, Cheese & Gourmet Foods, where he was the gourmet food buyer.

Ron attended the University of Tampa where he received a degree in accounting.

#### **COMMUNITY INVOLVEMENT**

Ron is a founding Board Member of Gilda's Club South Florida and has served as the Chairman of the Board of Directors. Currently he serves as President for the Georgina Dieter Dennis Foundation which provides scholarships to vocal majors attending Florida universities. He is a member of the Susie and Alan Levan Ambassador Board at NSU. He has also served as a member of the Advisory Board for the Fort Lauderdale unit of the American Cancer Society; and Advisory Board for the Salvation Army of Greater Fort Lauderdale. In addition, Ron has been very active in civic organizations such as Jewish Community Center of Greater Fort Lauderdale, Jewish Federation of Greater Fort Lauderdale, and Board of Directors for the Leadership Broward Foundation, Nova University Enterprise Ambassador Program. CAM 17-0807

EXHIBIT 4
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### Steven Wasserman sion

EXECUTIVE VICE PRESIDENT Colliers International



steven.wasserman@colliers.com

#### QUALIFICATIONS

Florida Real Estate License

Society of Industrial and Office Realtors (SIOR)

#### **CONTACT DETAILS**

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www.colliers.com

#### AREA OF EXPERTISE

Steven Wasserman serves as Executive Vice President at Colliers International and is one of the team leaders in the South Florida Industrial Services Group. Mr Wasserman has a diversified industrial practice where he represents institutional property owners in leasing and strategic advice.

#### **EDUCATION AND AFFILIATIONS**

Mr. Wasserman earned a Bachelor of Business Administration from the University of Miami. He attended Florida Atlantic University for a Master's in Business Administration. He is an active member of the Junior Achievement Fellows Program, Society of Industrial and Office Realtors (SIOR) and is the Chairman of the Council for Educational Change

#### **EXPERIENCE**

With over 36 years of experience in the South Florida market, Mr. Wasserman has dealt with a broad number of complex transactions; from build to suit, land development, environmental, and acquisition and disposition of specialized properties. He has marketed a 200-acre business park, two million square feet of institutional leasing and sold hundreds of thousands of square feet of owner/user properties.

#### **FEATURED CLIENTS**

- TIAA CREF
- LNR Partners
- East Group
- Prologis
- Trulite Corporation
- Suddath Companies
- Iron Mountain
- Bridge Development Partners
- Guardian Life
- Cabot Property Group
- Sunbeam Properties
- Becknell Industrial
- Hoerbiger Corp of America



# Russell Bornstein

SENIOR VICE PRESIDENT | RETAIL Colliers International South Florida



russell.bornstein@colliers.com

#### **QUALIFICATIONS**

Licensed Real Estate Broker State of Florida

# AFFILIATIONS AND MEMBERSHIPS

International Council of Shopping Centers

Board Member Wayne Barton Study Center

#### **CONTACT DETAILS**

DIRECT +1 561 353 3642

Colliers International South Florida, LLC 2385 NW Executive Center Dr. Suite 220 Boca Raton, FL 33431

www.colliers.com

#### AREA OF EXPERTISE

Russell Bornstein is a Senior Vice President with Colliers South Florida, bringing nearly 30 years of commercial real estate to his role. He specializes in retail markets throughout Florida and has earned a reputation as one of South Florida's top commercial real estate professionals.

As long-time exclusive representation for Wells Fargo and its approximate 250 branches in Southeast Florida, Mr. Bornstein and his partner Michael Wilson have provided steady and strategic commercial real estate advisory to the financial services company through various mergers over their 20 year relationship, including their real estate needs after they acquired Wachovia in the largest financial institution merger on record.

#### REPRESENTATIVE CLIENTS

- Bank Atlantic
- BankUnited
- Blockbuster Video
- Boston Market
- Dollar General
- Fifth Third Bank
- First Citizens Bank
- Holy Cross Hospital
- JP Morgan Chase
- Regions Bank
- Robert Half International
- Service Corp. International
- Shell Oil
- Wachovia Bank/Wells Fargo

# BUSINESS AND EDUCATIONAL BACKGROUND

Most recently as a Senior Vice President with CBRE, Russell has also garnered experience as a Senior Vice President with Grubb & Ellis Company (1999-2012); a role with Commercial Florida Realty Partners, Inc. (1996-1999) and as Managing and Leasing Agent for Zepka-Goldberg (1985-1996).

He holds a Bachelors degree in Business Administration from St. Bonaventure University, where he graduated Magna Cum Laude and also earned the Pierre R. Bretey Award for highest G.P.A. in the School for Business (Department of Finance).

#### **COMMUNITY INVOLVEMENT**

Russell is an active member within a number of local and professional organizations, including the International Council of Shopping Centers (ICSC) and a Board Member for the Wayne Barton Study Center in Boca Raton.



# Katy Welsh, cls, crx

SENIOR VICE PRESIDENT | RETAIL SERVICES
Colliers International | South Florida



katy.welsh@colliers.com

#### QUALIFICATIONS

Florida Real Estate License

Senior Certified Leasing Specialist (CLS)

Certified Retail Property Executive (CRX)

# AFFILIATIONS OR MEMBERSHIPS

2017 ICSC FLorida Conference Chair

2008 South Florida IDEX Chair

International Coucil of Shopping Centers (ICSC)

Past Chair Treasure Coast ICSC Committee

Past Chair Palm Beach ICSC

Past Chair Broward ICSC

South Florida IDEX

#### **CONTACT DETAILS**

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Colliers International South Florida, LLC 2385 NW Executive Center Drive Suite 220 Boca Raton, FL 33431

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#### AREA OF EXPERTISE

Katy Welsh brings more than thirty years of commercial real estate experience to her role as Senior Vice President of Retail Services for Colliers South Florida.

Her background includes expertise in the leasing, marketing and sale of shopping centers with a strong focus on maximizing property income and preparing properties for sale and repositioning.

Colliers' Retail Services Team is rooted in a commitment to offer a best-in-class team to service the growing retail landscape in South Florida. From urban, high street, institutional and tenant representation retail, the firm has strategically expanded expertise to create a 360-degree approach to servicing this niche property type.

# BUSINESS AND EDUCATIONAL BACKGROUND

Prior to joining Colliers, Welsh was with Konover South, where she was responsible for all aspects of leasing and marketing company and third-party shopping centers, including business development, deal analysis, annual budgeting, and creating recommendations for property improvement to the third-party owners. Notable recent deals include the Lowes Home Improvement Center located at Plaza at Davie, which redeveloped the shopping center.

Previously, Welsh served as Broker/
President of Hunter Real Estate Brokerage
from 2008-2014 and Director of Real Estate
for Kimco Realty from 2003-2008. Her
commercial real estate career has also
included various retail leasing positions with
Equity One/IRT Property Company, NAI/
Merin Hunter Codman, Concord Assets
Group and Millennium III Real Estate Corp.

Welsh holds a Bachelor of Science in Business Administration from Auburn University. She has earned the designations of Senior Certified Leasing Specialist (CLS) and Certified Retail Property Executive (CRX), both ICSC-established credentials which recognize an elite group of experienced shopping center leasing professionals.

#### COMMUNITY INVOLVEMENT

Active in her discipline, Welsh has been a prominent figure for ICSC, the trade organization for the international shopping center industry. She is the 2017 ICSC Florida Conference Committee Chair and has held numerous positions as chair or co-chair of the county chapters in years past.

Additionally, she was also the past Chair of the South Florida IDEX.



# Rich Lillis

EXECUTIVE VICE PRESIDENT | SOUTH FLORIDA NATIONAL DIRECTOR, HOTELS | USA



rich.lillis@colliers.com

# EDUCATION OR QUALIFICATIONS

State University of New York BS Economics

Florida Atlantic University MBA Candidate

Licensed Florida Real Estate Broker

# AFFILIATIONS OR MEMBERSHIPS

ULI

ULI Hospitality & Recreational Development Council (HRDC)

#### **CONTACT DETAILS**

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Colliers International South Florida, LLC 2385 NW Executive Center Dr Suite 220 Boca Raton, FL 33431

www.colliers.com

#### AREA OF EXPERTISE

Rich Lillis advises clients on hotel and resort investment sales and financing in Florida, Eastern United States and the Caribbean. Additionally, Rich serves as National Director, Hotels USA and leads Colliers' nationwide team of lodging transaction experts. In the dynamic hotel investment market, Rich provides valuable solutions to hotel owners and investors, special servicers, regional lenders, land owners and developers.

#### **BUSINESS AND BACKGROUND**

Rich's diverse background includes a wide range of experience in lodging and finance. He successfully manages numerous hotel, resort and land transactions, for private and institutional owners. Rich is a national lodging investment expert and frequently speaks at industry conferences including ALIS, NYU and Nabhood. As an integral member of Colliers Asset Resolution Team CART, Rich serves as "Lodging/Hotels Regional Team Leader" for a few key Special Servicer client relationships. Previously, Rich served as Miami hospitality practice leader for Horwath HTL, an international hotel consultancy firm where he managed hotel and resort transactions and financings throughout Florida and the Caribbean. Prior, at Ocwen Financial Corporation (OCN) of West Palm Beach, Rich asset-managed the bank's large commercial REO portfolio and managed the company's corporate real estate.

Before that, Rich enjoyed an illustrious career in hotel operations, starting as Night Clerk at The Plaza Hotel NYC, followed by management at six Marriott Hotels, Sheraton Plaza Chicago and Doral Arrowwood NY, and as General Manager of Doral Court & Tuscany NYC (now "St. Giles"), Knickerbocker Chicago and Mutiny Miami. Rich and his wife Maureen also owned and operated an acclaimed restaurant in Westport, Connecticut.

Rich graduated with a BS in Economics with honors from State University in New York. He has recently completed coursework as an MBA candidate at Florida Atlantic University. Rich is a licensed Florida real estate broker. He resides in Boca Raton, Florida.

#### REPRESENTATIVE CLIENTS

- LNR Partners LLC
- Lone Star Funds
- Delaware North Corporation
- New Castle Hotels
- Rio Partners
- Valley View Bank
- Pacifica Companies
- Marx Realty
- Benenson Capital
- Torchlight Investors
- CW Capital
- Ocean Partners
- Lubert Adler
- Madison Properties LLC



# Gerard Yetming

EXECUTIVE VICE PRESIDENT
Colliers International South Florida



gerard.yetming@colliers.com

# **QUALIFICATIONS**Florida Real Estate License

#### CONTACT DETAILS

DIR +1 786 517 4995 MOB +1 305 610 4721

Colliers International 801 Brickell Avenue Suite 850 Miami, FL 33131

www.colliers.com

#### AREA OF EXPERTISE

Gerard Yetming joined the South Florida offices of Colliers International in 2016, launching the firm's Urban Core division. As co-leader of this group, his team focuses on all product types in urban South Florida neighborhoods.

A dynamic and dependable commercial real estate broker with over 15 years of commercial experience, he has demonstrated success pioneering new, emerging brokerage practices in complex, non-traditional niches - including condominium conversions in the early 2000's and urban land in the early 2010's.

He has a a proven track record for successfully executing capital market transactions, having been involved in \$7 billion of assignments including some of the largest and most complex transactions in South Florida. His recent focus on urban land assignments has resulted in \$1 billion of transactions over the past since 2012.

#### PROFESSIONAL ACCOMPLISHMENTS

- Achieved higher price per acre for any land sale in Florida (Epic East)
- Brokered sale of one of the largest multifamily condominium conversion portfolios in Florida (Morgan Portfolio)
- Represented owner in sale of largest single multifamily value-add property in South Florida (Resort at Pembroke Pines)

# BUSINESS AND EDUCATIONAL BACKGROUND

Prior to Colliers, he co-led the land and multifamily practice at CBRE South Florida. Additionally, Gerard served as Chief Investment Officer for The Federated Companies, a national real estate investment group that developed and managed over 7,500 units of residential housing with an aggregate value of over \$1.5 billion.

He received his Master of Business
Administration with majors in Finance and
Entrepreneurship from the Wharton School
at the University of Pennsylvania in May
1999. Gerard also received a Bachelor of
Mathematics with a concentration in
Information Systems in May 1992 from the
University of Waterloo in Ontario, Canada.



# Michael Nissley

EXECUTIVE VICE PRESIDENT
MANUFACTURED HOUSING GROUP
Colliers International



michael.nissley@colliers.com

#### **QUALIFICATIONS**

Licensed Real Estate Broker State of Florida

# AFFILIATIONS AND MEMBERSHIPS

Manufactured Housing Institute (MHI)

# CONTACT DETAILS OFFICE +1 561 353 3650

Colliers International South Florida, LLC 2385 NW Executive Center Dr. Suite 220 Boca Raton, FL 33431

www.colliers.com

#### AREA OF EXPERTISE

Mike Nissley is an Executive Vice President and National Director of the Colliers Manufactured Housing Group and also leads the Marina Group. Mr. Nissley is responsible for execution of the team's marina and MHRV assignments. This includes strategic positioning of offerings, coordination of the financial and underwriting processes, and interaction with key decision makers within industry REITs, large institutional investment firms, family offices, developers and owner operators.

His unique understanding of both land sales & development as well as cash flow sales enable him to understand and clearly present complicated transactions. Mr. Nissley has been the integral part of more than \$2.0 billion of commercial real estate sales, including the recent closing of an 11-property Marina Florida portfolio that ranks as the largest-brokered marina transaction ever in the United States. In addition, Mr. Nissley has also sold the largest Marina portfolio in Canada for one of the largest Canadian pension funds.

# BUSINESS AND EDUCATIONAL BACKGROUND

Before joining Colliers, he was the founder, national director & top producer and of the MHRV and Marina groups at CBRE for 10 years where he built the most dominant team in the industry. During his time at CBRE he expanded the manufactured housing group deeper into RV Communities and started the Marina Services Group.

Nissley began his career at Grubb & Ellis in Boca Raton, FL where he founded the national manufactured housing group, the first of its type in a major public commercial real estate company. Nissley quickly rose to become the top broker in the state of Florida for 3 consecutive years, top 50 broker in the US for 2 consecutive years.

Nissley earned a BBA in Business from Florida Atlantic University.



# Kevin I. Morris

SENIOR VICE PRESIDENT Colliers International



kevin.morris@colliers.com

#### **QUALIFICATIONS**

Florida Real Estate Broker's License

#### **CONTACT DETAILS**

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Colliers International South Florida, LLC 200 East Broward Boulevard Suite 120 Fort Lauderdale, FL, 33301

www.colliers.com

#### AREA OF EXPERTISE

Spearheading the firm's Affordable Housing division, Kevin I. Morris brings more than 20 years of commercial real estate experience to his role for Colliers South Florida.

In the past ten years, he has narrowed his specialty, focusing on affordable housing property transactions. He has experience closing a broad range of project-based deals, including the Homeownership Assistance Program (HAP), Rural Development (RD 515), and Low-Income Housing Tax Credit (LIHTC) which included both General Partner interest transfers and fee simple sales.

Building upon Kevin's foundation of knowledge and experience, the Affordable Housing division is positioned to help clients navigate the complexities of this niche property landscape - including strategic planning issues, development and tax matters, and intricacies of federal, state and local housing programs.

#### NOTEWORTHY RECENTLY-CLOSED DEALS

- Ramblewood Apartments / 14 Units HAP, Green Cove Springs, FL
- Landau Apartments / 80 Units HAP, Clinton, SC
- Center Court Apartments / 180 Unites LIHTC, Bradenton, FL
- Pembroke Towers Apartments / 100 Units HAP + land, Pembroke Pines, FL

# BUSINESS AND EDUCATIONAL BACKGROUND

Prior to joining Colliers International South Florida, Kevin was Vice President of the Capital Markets Team for CBRE, also specializing in Affordable Housing transactions. Prior to CBRE, he worked for Marcus & Millichap, from 1996 to 2014.



## Charles Badell MAI

MANAGING DIRECTOR | VALUATION & ADVISORY SERVICES Colliers International



charles.badell@colliers.com

# **EDUCATION AND QUALIFICATIONS**

MBA, Florida International University, Chapman Graduate School of Business

BABA, University of Florida, Warrington College of Business Administration

#### STATE CERTIFICATION

Florida

#### **CONTACT DETAILS**

DIR +1 786 517 4855 MOB +1 813 221 2290

Colliers International South Florida, LLC 801 Brickell Avenue Suite 850 Miami, FL 33131

www.colliers.com

#### AREA OF EXPERTISE

Charles Badell serves as Managing Director of Valuation and Advisory Service, with more than 17 years of Real Estate Appraisal and Consulting experience in South Florida counties of Miami-Dade, Broward, Palm Beach and Monroe.

He has extensive experience in financial analysis and valuation of commercial real estate throughout South Florida, including appraisal of fee simple, leased fee, and leasehold interests in real estate. Property types appraised include office, industrial, multi-family, retail, service-stations, hotels, self-storage facilities, assisted-living facilities, residential subdivisions, agricultural land, commercial land and proposed construction.

#### **EXPERIENCE**

- 2015-present: Colliers International Valuation & Advisory Services | Managing Director
- 2014-2015: Integra Realty Resources | Associate Director
- 2011-2014: Integra Realty Resources | Senior Analyst
- 2008-2011: Miami Appraisal Service | VP Commercial Division
- 1999-2011: Miami Appraisal Service | Staff Appraiser

# PROFESSIONAL MEMBERSHIPS AND ACCREDITATIONS

- Appraisal Institute Member (2011)
- Appraisal Institute Leadership
   Development Advisory Council (LDAC)
   2012-2014
- Board of Directors, South Florida Chapter of Appraisal Institute (2016-current)

#### APPRAISAL INSTITUTE COURSES

- The Economic Engines of Miami-Dade County
- 7-Hour National USPAP Update
- General Demonstration Report-Capstone
- Advanced Income Capitalization
- Advanced Market Analysis and Highest and Best Use
- Advanced Concepts and Case Studies General Appraiser Report Writing and Case Studies

#### OTHER RELATED COURSES

- Appraisal of Self Storage Facilities
- Appraisal of Assisted Living Facilities
- Florida Appraisal Laws and Regulations
- Appraising and Analyzing Retail Shopping Centers for Mortgage Underwriting
- Appraising and Analyzing Office Buildings for Mortgage Underwriting



# Verity Mosquera MBA

RESEARCH & CONSULTING MANAGER Colliers International



verity.mosquera@colliers.com

# **EDUCATION AND QUALIFICATIONS**

MBA, International Business St. Thomas University

LLB Law Anglia Ruskin University

# AFFILIATIONS OR MEMBERSHIPS

Urban Land Institute (ULI)

#### **CONTACT DETAILS**

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Colliers International South Florida, LLC 200 East Broward Boulevard Suite 120 Fort Lauderdale, FL, 33301

www.colliers.com

#### AREA OF EXPERTISE

Accomplished business analyst and project manager, Verity Mosquera, uses her experience in analytics, leadership and international business to monitor the global economy and its impact on the commercial real estate market.

# BUSINESS AND EDUCATIONAL BACKGROUND

Prior to joining Colliers International, Verity worked for The Washington Economics Group, Inc., where she led a team of eight economists as Manager of Client Services to prepare detailed economic impact analyses of a number of high-profile transportation and real estate projects in South Florida including SkyRise Miami and All Aboard Florida. Other notable South Florida clients she has worked with include Tate Capital, Odebrecht, Miami-Dade Expressway Authority and the International Speedway Corporation.

Previously, Verity was a data analyst for Equity Insurance in Brentwood, UK, and served in the office of the Dean at St. Thomas University's School of Business in Miami Gardens, Florida.

Verity earned a Masters of Business
Administration with a focus on International
Business from St. Thomas University, and a
Bachelor of Laws from Anglia Ruskin
University's School of Law in London. Verity
is currently earning her Commercial Property
Research Certification (CPRC) through
Colliers University.

#### PROFESSIONAL ACCOMPLISHMENTS

Verity played an instrumental role in the research, analysis and management of the following sample economic impact studies:

- Economic Impacts of the All Aboard Florida Intercity Passenger Rail Project
- The Economic Impacts of the MDX FY 2015-2019 Five Year Work Program: Providing Mobility Solutions to the Miami Dade County Community

#### COMMUNITY INVOLVEMENT

Verity has a passion for teaching and mentoring. While earning her MBA at St. Thomas University, Verity served as president of Future Business Leaders of America - Phi Beta Lambda and spoke numerously on business and women career issues. She is the recipient of the Outstanding Graduate Award and the Women in Leadership Award in recognition to her commitment to St. Thomas University.

Most recently, Verity served as an adjunct professor for Miami Dade College School of Business teaching Principles of Management to undergraduate students pursuing their Bachelor's degree in Business Administration.



# Kris Mitchell CPMC

MARKETING MANAGER | SOUTH FLORIDA Colliers International



kris.mitchell@colliers.com

# EDUCATION OR QUALIFICATIONS

Commercial Property Marketing Certification (CPMC)

#### **CONTACT DETAILS**

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Colliers International South Florida, LLC 200 East Broward Boulevard Suite 120 Fort Lauderdale, FL, 33301

www.colliers.com

#### AREA OF EXPERTISE

Kris has over seven years of experience in client service and marketing. As Marketing Manager, he responsible for leading marketing for the South Florida region and supporting brokers and clients in four key marketing areas that include pitches & presentations, property marketing, positioning, and internal & external communications. He is also the content manager for the firm's South Florida website. Kris is responsible for site updates, maintenance and improvements, as well as, online lead generations and search engine optimization.

Kris has been instrumental in the creation and implementation of new marketing templates for the South Florida team. He also works alongside market leaders in creating digital and print advertising, including property, lead generation, recruitment and website campaign ads.

#### PROFESSIONAL ACCOMPLISHMENTS

- Introduced a cloud-based electronic signatures platform to improve efficiency and in turn, extend that great experience to our clients
- Created and implemented new marketing templates
- Improved overall SEO performance for the firms website within three months of implementation including a 200% increase in organic page views
- Received his Commercial Property Marketing Certification (CPMC) through Colliers University

# BUSINESS AND EDUCATIONAL BACKGROUND

Prior to joining Colliers, Kris was the Store Manager for FedEx Office in Hollywood FL, where he oversaw the center's daily operations. His main goal as a store manager was to grow and develop his team as future leaders of the company. He also worked at Bank of America as a Customer Relationship Manager where he was responsible for allocating modifications for homeowners who are behind on their mortgage. Kris is currently pursing his Bachelor's Degree in Advertising/Marketing. He also earned his Commercial Property Marketing Certification (CPMC) through Colliers University.

#### COMMUNITY INVOLVEMENT

Kris is actively involved in his Church Community. He served as a team leader for the Youth at his Church planning activities and events to help encourage young teens to be involved in music arts.

Kris also works with the church by participating in their community events such as the "Feed the City" and "Serve the City," to give back to less fortunate families and organizations.



# Leah Dellis

MARKETING COMMUNICATIONS SPECIALIST Colliers International South Florida



leah.dellis@colliers.com

#### **EDUCATION**

B.S., Management & Communications
Rensselaer Polytechnic
Institute

#### **CONTACT DETAILS**

DIR +1 786 517 4994 FAX +1 786 735 3178

Colliers International 801 Brickell Avenue Suite 850 Miami, FL 33131

www.colliers.com

#### AREA OF EXPERTISE

Based out of the Miami office of Colliers International, Leah Dellis is a Marketing Communications Specialist focused on development and implementation of strategic marketing and public relations opportunities with the South Florida brokerage teams.

With a diverse background rooted in commercial real estate, Leah has experience spanning transaction and portfolio management, consulting, marketing, public relations and CRE technology.

# BUSINESS AND EDUCATIONAL BACKGROUND

Most recently as a Senior Account Manager at New York-based Hightower Inc., Leah managed the SaaS account relationship for a premier roster of CRE owners and their leadership teams. As the client-facing key representative on these accounts, she customized playbooks to create success targets and facilitate the end-to-end deployment of the platform, including data migration, user-reporting and structured feedback in conjunction with product support.

Prior to Hightower, Leah served in multiple roles within the New York office of Colliers International, first as a Director of the Tri-State Consulting Group and later, as Account Operations Manager with the Corporate Solutions team. While there, she was responsible for the ongoing support and management of multi-market transaction activities on behalf of Colliers Corporate

Solutions clients, liaising between the CS service lines and local market experts to drive informed portfolio analysis and planning.

Leah's career began in leasing and development, where she spearheaded the marketing program for a 1.7 million SF Class A office park in Albany, N.Y. There, she also project managed and bid out select capital improvement projects in the park.

Leah studied International Business at SDA Bocconi in Milan, Italy, and received a Bachelor of Science in Management with minor in Communications from Rensselaer Polytechnic Institute (RPI) in Troy, N.Y.

#### COMMUNITY INVOLVEMENT

Leah is an active volunteer with Climb for Memory, a nonprofit organization that supports research and awareness for Alzheimer's disease.

A transplant from New York City and fitness enthusiast, she also regularly participated in charity fundraising events for Team Dangerous, a community-focused fitness organization that gives back to health causes, such as the National Childhood Obesity Foundation and other similar localized causes.



# Amanda McFarlane

ADMINISTRATIVE MANAGER | South Florida Colliers International



amanda.mcfarlane@colliers.com

# **EDUCATION AND QUALIFICATIONS**

B.S. Business Administration, Post University

**Notary Public** 

# **CONTACT DETAILS**DIR +1 786 433 5385

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www.colliers.com

#### AREA OF EXPERTISE

Amanda McFarlane is an Administrative Manager for the South Florida operations of Colliers Internatonal, based out of the Miami office. As our region continues to grow, Amanda provides the vital support and coordination for the operational side of our business, ranging from office equipment and purchasing, new-hire orientation, office events and vendor relationships, among others.

#### **EXPERIENCE**

Prior to joining Colliers, Amanda served as Office Manager for IDI Gazeley, a major investor and developer of logistics warehouses and distribution parks, where she oversaw all office operations, including budgeting, expense management and closely monitored and managed office equipment, subscriptions and the firm's local website, among other roles. She is organized and well-versed in the a wide-range of operational duties, experience she draws from prior roles as Office Manager with BG Architecture and Executive Assistant with DaVita Laboratories.

#### **EDUCATION**

Amanda holds a Bachelor of Science in Business Administration from Post University in Waterbury, CT, and is certified in Microsoft Project. Additionally, she is a Notary Public.

# APPENDIX B



# STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

# DIVISION OF REAL ESTATE

THE BRANCH OFFICE HEREIN HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

# COLLIERS INTERNATIONAL SOUTH FLORIDA LLC

COLLIERS INTERNATIONAL SOUTH FLORIDA 200 EAST BROWARD BOULEVARD SUITE 120 FORT LAUDERDALE FL 33301

LICENSE NUMBER: BO2030083

**EXPIRATION DATE: MARCH 31, 2018** 

Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

# APPENDIX C





# Public Service

The government real estate sector is the largest in the United States. It's also the most complex because the government's procedures for acquiring, managing and disposing of real property are subject to layers of regulations, policy, legislation and executive orders. Making sense of it all can be challenging, but Colliers' Government Solutions team understands how to chart a path to successful execution. In everything we do, we apply a team approach, leveraging the depth and experience of Colliers' large and

Our platform consists of six services specifically focused on government real estate: Leasing, Investment Sales, Property Management, Project Management, Appraisal and

# Our Service Platform

#### **LEASING**

Colliers Government Solutions understands government acquisition regulations and the strict performance requirements of the federal lease form. Our team does more than just execute transactions - we pride ourselves on ensuring each lease's long-term integrity. We stay abreast of all changes in government policy and procedure to advise our clients how to plan, budget, and position their properties to attract and retain federal tenants. Our mission is to provide integrated services that maximize property value and exceed our clients' investment objectives.

#### PROJECT MANAGEMENT

A unique feature of government leases is that they typically require that property owner to be responsible for the tenant's buildout or alterations, both at the outset of the lease and throughout its term. Therefore, it's essential to have a skilled project management team on call. Colliers Government Solutions provides professionals experienced with the unique challenges of government assignments, such as small business subcontracting, managing multiple stakeholders within GSA and the tenant agencies, and keeping to the schedule.

On-time completion is essential, especially when the government's lease commencement is predicated on acceptance of their finished space. The Colliers team creates a positive and collaborative working relationship with the government early in the process, actively leading the technical aspects of the design, construction, and occupancy in order to achieve the project objectives. We also make life easy for all parties by planning and coordinating all project deliverables, approvals, budgets, schedules, control mechanisms, resource requirements and communications.

#### **INVESTMENT SALES**

To yield the highest value and best deal execution Colliers Government Solutions offers GSAXCHANGE, a team of sales professionals specializing solely in the sale of government-leased properties.

The GSAXCHANGE team accelerates clients' success by providing a deep understanding of factors associated with government-leased real estate, utilizing local market knowledge and leveraging Colliers' national presence. Our business strategy is geared to the acquisition and sale of government-leased properties nationally providing marketing exposure to thousands of government property owners and investors throughout the United States and overseas.





#### PROPERTY MANAGEMENT

As part of the Colliers Government Solutions platform our property managers are trained specifically to administer government leases and resolve common conflicts. We keep our management team abreast of changes in the government's leasing policy and we ensure our budgets anticipate future capital needs relating to evolving requirements. Most importantly, we manage properties well. Colliers Real Estate Management Services implements best practices learned from the management of more than 1 billion square feet worldwide.

#### **APPRAISAL**

Colliers Government Solutions valuation team is headed by a single point of contact, which leverages the industry-leading Colliers International Valuation and Appraisal Services organization, consisting of 25 regional hubs in the United States. Combine this with market research support from Colliers' 115 U.S. offices and our coverage is among the very best in the nation.

When you need accurate appraisals tailored to the unique features of government-leased properties, Colliers Government Solutions is the market leader.

#### TAX APPEAL

Teaming with Colliers Government Solutions provides a tax appeal offering tailored to the needs of government-leased property owners. The Colliers-McIntosh partnership combines its skills to ensure that the unique aspects of the government lease are valued—and taxed—appropriately. Flat rent structures, rolling termination rights, "subject to annual appropriations" clauses, building shell expenses, operating risk and other lease factors are addressed as part of the appeals process. Further, McIntosh leverages Colliers' national government sales database to support its tax reduction proposals. Colliers is the only U.S. firm to provide tax appeal services designed specifically for government property owners.







The responsibility of the development, marketing, and execution of every assignment is shared across the GSAXCHANGE team. By providing multiple points of contact to the investment marketplace, the GSAEXCHANGE covers the full spectrum of prospective purchasers of government-leased property across all regions of the country. Through our Sharepoint Investor Tracking and daily communication and collaboration across the team, we are able to provide the client with constant, real-time information and feedback from the marketplace that no other service provider can match. Your GSAEXCHANGE team constantly delivers:

**UNMATCHED MARKET KNOWLEDGE** - Across the entire spectrum of the government-leased asset marketplace.

**EXPERIENCED TEAM** - Our Team has executed multiple large-scale and complicated transactions and assignments.

BUYER & SELLER REPRESENTATION EXPERIENCE - We know BOTH sides of the negotiating table.

PROGRAMMATIC APPROACH - Disciplined, detailed and "Best Outcome" driven.

FOLLOW-THROUGH AND ACCOUNTABILITY - Transparency and communication throughout the assignment.

COMMITTED TO MINIMIZING OR ELIMINATING RISK - Allows the client to focus on their core business.

PROVEN ANALYTICS - Market knowledge and experience translates into reliable accuracy.

# APPENDIX D



# AFFORDABLE HOUSING GROUP

# **EXPERTISE** THROUGH SPECIALIZATION

With over \$2.6 billion in closed commercial multifamily transactions and a combined industry experience of 75 + years, the majority of which have been in affordable housing, the Affordable Housing Group has earned a strong reputation across the country. The Affordable Housing Group is regarded as one of the industry's leading HUD, LIHTC, and Affordable multifamily investment groups in this highly specialized community. The Affordable Housing Group has extensive hands-on experience in the sale of LIHTC and multifamily properties with Project Based Section 8, HUD Insured debt, state agency financed and value-add subsidies. By commanding industry expertise, the Affordable Housing Group is able to execute the sale and restructuring of the highly complex transactions with ease. The group's understanding of how the financing, rent subsidy contracts, use restrictions, state agency issues, sources of gap financing, property tax adjustments, and other elements of each property impact the value of the real estate has been essential to its success. In this, the Affordable Housing Group has a long history of successfully navigating through the maze of encumbrances, soft money sources, regulatory restrictions, and tenant income covenants to consummate the transaction and produce substantial value for the clients.

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# **Underwriting & Due Diligence**

We perform thorough evaluation of our client's properties, all financial statements, assess against local industry standards, and complete financial underwriting which presents the asset in the best possible light - all while maintaining credibility with potential purchasers. We skillfully identify hidden value that is typically not visible to others by bringing the strongest perspective on market trends, thorough understanding of the property, and effective analysis to bear. This translates into enhanced certainty in our transactions and the highest value possible in the market.

# Client - Centric Approach

We understand that information is vital to every client. By combining experience and staying on the cutting edge of ever-changing regulations, trends, and market research, we deliver real expertise and in-depth understanding of our client's requirements and investment needs. We actively reach out to the community, using our nationwide network to ensure the best possible fit for the deal.

# **Customized Marketing Strategies**

While marketing our client's properties, we leave no stone unturned until it has been exposed to all potential buyers and brokers. We regularly update our database of buyers through tracking public information of transactions with HUD and LIHTC properties. We utilize every medium of advertising technology and actively reach out to those in the industry to ensure that we find the best fit. Through this method, the Affordable Housing Group has consistently delivered multiple offers, creating a competitive bid environment in every one of our transactions.

# AFFORDABLE HOUSING GROUP

# The Affordable Housing Group Selected Transactions



#### Lakeview Apartments 10250 Westlake Dr, Bethesda, MD

Sale Price:	\$34,000,000
Units:	152
Price Per Unit:	\$223,684
Classification:	Section 8



#### Miracle Terrace 225 S. Western Ave, Anaheim, CA

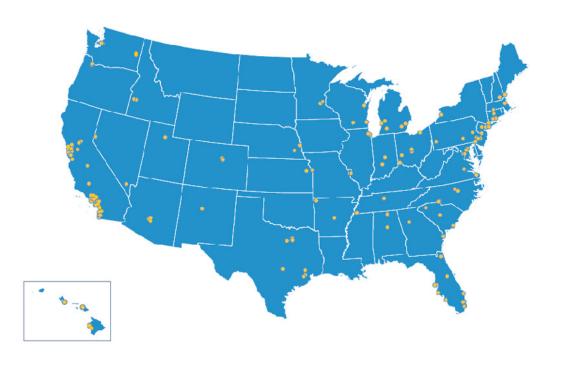
Sale Price:	\$37,250,000
Units:	179
Price Per Unit:	\$208,100
Classification:	HUD 236



#### Centre Court Apartments 4255 W, 52nd Place, Bradenton, FL

Sale Price:	\$12,250,000
Units:	180
Price Per Unit:	\$60,056
Classification:	LIHTC

#### At A Glance



Over **75**+ Years
Combined Experience

**\$2.6** Billion in Affordable Transactions

**300**+ Affordable Closings

**11,000**+ Units Sold

# The Affordable Housing Group Selected Transaction History

Village on the Green	264	\$49,500,000
Village on the Green Apartments	265	\$43,000,000
Miracle Terrace	179	\$37,250,000
Oak View of Sonoma Hills	208	\$35,500,000
Monterra Springs Apartments	111	\$30,100,000
Woodpark	128	\$22,250,000
Buena Vida at Town Center	115	\$21,500,000
Cypress Village	88	\$20,900,000
Bellflower Friendship Manor	170	\$19,149,999
Il Pompeii Luxury Apartments	111	\$19,000,000
Norwalk Christian Towers	185	\$19,000,000
Renaissance Park	127	\$18,500,000
Harborscape Apartments	88	\$16,500,000
Pebble Cove	112	\$16,500,000
Buckingham	83	\$15,500,000
Vista Alicante	100	\$14,350,000
Spokane Portfolio	168	\$12,500,000
Country Club Apartments	91	\$10,200,000

Lakeview Apartments	152	\$34,000,000
Crestview Apartments	1000	\$32,000,000
Washington State Portfolio	151	\$29,200,000
Hanover Square	199	\$27,000,000
Viewpoint Senior Apartments	114	\$20,000,000
Key Largo Apartments	132	\$16,000,000
Las Brias Apartments	120	\$14,500,000
Triangle Terrace	75	\$13,500,000
Meridian Manor	101	\$12,050,000
Indio Gardens	150	\$10,200,000
Liguitti Senior Apartments	139	\$9,100,000
Elise Mason Manor	150	\$7,500,000
Whitney Young	200	\$7,400,000
Omaha Amber Apartments	150	\$5,800,000
Briarwood Apartments	100	\$4,500,000
Silver Lake Apartments	88	Confidential
Square Apartments	86	Confidential
Orange Gardens	160	Confidential



# AFFORDABLE HOUSING GROUP



JAMES T. LAMPMAN | Senior Vice President | Affordable Multifamily Specialist

Seattle, WA Office | 206-233-1434 | james.lampman@colliers.com

Jim has over 30 years of commercial real estate experience specializing exclusively in affordable housing real estate nationwide. His expertise includes all forms of multi-housing for seniors - both affordable and care facilities - as well as affordable housing for families. From assets under IRS Section 42 Low Income Housing Tax Credit (LIHTC) properties to federally subsidized properties under HUD's Section 8 program, Jim has substantial experience working a variety of deal types.

Jim has transacted over 250 affordable housing deals spanning across more than 28 states. His team's sole focus is on marketing of expiring LIHTC projects coming out of tax credit usage and the preservation of Section 8 projects. Throughout his career, Jim has developed a broad database of owners and buyers by monitoring all Section 42 LIHTC and Section 8 Project ownership and buyers nationwide. In this manner, Jim is able to consistently find the most suitable and qualified buyer for each property that he represents.

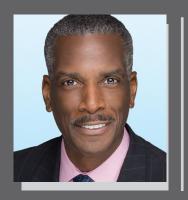


JOHN L. NGUYEN | Senior Vice President | Affordable Multifamily Specialist

Irvine, CA Office | 949-724-5581 | john.l.nguyen@colliers.com

John serves as a Senior Vice President for Colliers International. John specializes in HUD-Affordable transactions and is a HUD-Affordability Multi-family Specialist with the Affordable Housing Group. After making his mark as rookie of the year and consistently ranking as one of the top multi-family agents at an another national brokerage firm, John paved the direction of his team towards affordable housing because of the inefficiencies in the marketplace. Since his team's sole focus on affordable housing, they have been able to provide best in class service.

John is regarded as one of the industry's leading HUD & Affordable multifamily investment group in this highly specialized community. John has extensive hands-on experience in the sale of multi-family Project Based Section 8, HUD-Insured, state agency financed, and value-add subsidized properties. By commanding industry expertise, John is able to execute the sale and restructuring of the highly complex transactions with ease. His understanding of how the financing, rent subsidy contracts, use restrictions, property taxes, and other elements of each property, impact the value of the real estate and has been essential to his success and long history of consistently producing substantial value for the clients.



KEVIN I. MORRIS | Senior Vice President | Affordable Multifamily Specialist

Fort Lauderdale, FL Office | 954-652-4626 | kevin.morris@colliers.com

Kevin brings more than 20 years of commercial real estate experience to his role in the Affordable Housing Group. In the past 10 years, he has narrowed his specialty to focus solely on affordable housing transactions. Kevin has experience closing a broad range of project-based deals, including the Homeownership Assistance Program (HAP), Rural Development (RD 515), and Low-Income Housing Tax Credit (LIHTC) which includes both General Partner interest transfers and fee simple sales.

With his foundation of knowledge and experience combined with the Affordable Housing Group platform, Kevin is positioned to help clients navigate the complexities of this niche with expertise. Kevin's in-depth understanding of strategic planning issues, development and tax matters, and the intricacies of federal, state, and local housing programs are just a few of the aspects that set Kevin apart from his competitors.



JESSE ELSANHUTY | Vice President | Affordable Multifamily Specialist

Irvine, CA Office | 949-724-5590 | jesse.elsanhuty@colliers.com

Jesse has more than 7 years of successful experience and increasing responsibility. He began his career focusing on the sale of multifamily properties in Southern California; however, after just a few years, Jesse recognized a demand in communities across the nation for affordable housing specialists. He joined the Affordable Housing Group and re-positioned his target to the brokerage of project-based Section 8 properties and government subsidized housing.

Jesse has made a name for himself with his ability to consistently meet and exceed client expectations and demonstrate a keen knowledge of his product type. While he has represented a wide spectrum of owners from principals to public and private institutions, investors and syndication groups, state agencies and housing authorities, Jesse's true expertise lies within representing nonprofit organizations. He understands the intricacies of working alongside decision makers to form a plan that will help to preserve the legacy of the property, while also maximizing the value.

# AFFORDABLE HOUSING GROUP

# The Affordable Housing Group Selected Transactions



**SIERRA MARANGOLA** | Client Services Coordinator

Irvine, CA Office | 949-724-5591 | sierra.marangola@colliers.com

Sierra serves as the Client Services Coordinator for the Affordable Housing Group. With an in-depth background in marketing, graphic design, and client relations, Sierra has been integral in fostering the growth of the Affordable Housing Group.

As the Client Services Coordinator, Sierra collaborates with all parties in the transaction for an efficient transaction process. Before escrow, she works closely with both buyer and seller representatives to ensure that all required documentation is in good order for a smooth transition throughout the transaction process. Active involvement continues during escrow; general oversight, tracking, coordination of all due diligence materials, coordination between escrow companies and mortgage brokers, and tending to client needs and requests are just a few of the ways that Sierra is involved.



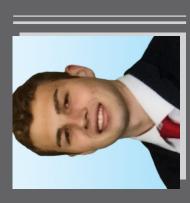
MARGUIE DELGADO | Client Services Coordinator

Fort Lauderdale, FL Office | 954-652-4625 | marguie.delgado@colliers.com

Marguie serves as a Client Services Coordinator for the Affordable Housing Group at it's Fort Lauderdale office. With experience in commercial real estate research, Marguie strengthens the core research group with a focus on Affordable Housing and provides brokerage support.

Marguie provides support for the group by gathering and analyzing data to create focused market reports, as well as gather property due diligence for client deliverables. She spearheads the planning and implementation of direct mailing campaigns in strategic targeted markets to raise awareness of the group and its transactions. Marguie also supports sales associates with the use of industry software platforms and conducts business development outreach based on her prospect data.

# The Affordable Housing Group Selected Transaction History



# PETER KOHLY | Research Analyst

Irvine, CA Office | 949-724-5595 | peter.kohly@colliers.com

Peter joined the Affordable Housing Group as a Research Analyst. With a background in both commercial real estate and finance, Peter is a well-rounded addition to the group.

al trends as well as the intricacies of local markets. He maintains the property database and ensures the accuracy of all it's information. In addition Peter's main function is to conduct nationwide market research. Keeping a finger on the pulse of overall market behavior, Peter understands nationto research functions, Peter provides support to the Client Services Coordinator in marketing and client services efforts.



# MARNIE MILLER | Underwriter Analyst

As the Underwriter Analyst for the Affordable Housing Group, Marnie plays an important role in the beginning stages of prospective projects.

Working closely with the brokers, Marnie determines the financial feasibility of prospective projects by preparing financial analysis and operating pro-formas, as well as development budgets. Using her years of experience, Marnie is diligent in her analysis and consistently delivers the best possible value estimates for a project.

Marnie's extensive knowledge of this field stems from her experience in the financing and execution of over \$1 billion in project transactions.





#### **CONTACT DETAILS**

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Commercial Real Estate Services

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