

# Back Office & Admin

Operating a real estate portfolio requires a significant commitment to administrative and “back-office” functions. In-house management of these services often requires a costly investment in software, licenses, and infrastructure—all within a data-sensitive environment. In addition, administrative and “back office” roles can be extremely challenging to scale up or down to meet the needs of an evolving portfolio. BetaWest provides this back office function for you—adding significant value to your investment enterprise and allowing you to focus on growing your business.

## **Our selection of administrative services includes:**

### Financial Analysis and Modeling

We understand that efficient and accurate financial modeling is critical to making investment decisions.

Our financial analysis and modeling foundation stems from staff with advanced graduate degrees in real estate investments. We can provide a wide range of models, from basic cash flow projections to advanced models that incorporate historical data, business plan projection assumptions, cash flow waterfalls, and valuation modeling. Whatever type of modeling your investment requires, we incorporate clearly labeled “input drivers”, summary and detailed formats that are easy to understand—allowing you flexibility to adapt in an ever-changing environment.

### Insurance Advisory and Tracking

Placing property and liability insurance in appropriate amounts with correct coverage and at the right costs requires substantial expertise. Our experience in placing insurance programs in insurance advisory and tracking allows us to administer this critical function as a consultant or completely on your behalf.

### Lease Administration

We provide on-going lease administration services for clients looking to outsource certain back office functions. Our role can include:

- Monitoring of important dates and deadlines
- Ensuring compliance with major lease requirements
- Tenant credit evaluation
- Economic analysis of proposed lease terms

### Property Taxes

Property taxes can often be a major expense for any real estate investment. We have found that a network of local resources is much more effective at keeping tax valuation reasonable rather than hiring a single national consultant. BetaWest has extensive experience in evaluating the appropriate amount of real estate taxes and pursuing any necessary adjustments with local jurisdictions.

### Abstracting of Agreements

Abstracting, summarizing and analyzing complex legal agreements to make compliance or operating more manageable can be challenging and time consuming. BetaWest provides this function for many of our clients involving management agreements and tenant leases; loan documents; franchise or other branding agreements; financial contracts; rent rolls and reconciliations; CAM reconciliations and Estoppel/SNDA agreements. Depending on your needs, we can perform these services as a one-off transaction or as part of a larger suite of services.

## Additional Services

- Data aggregation and due diligence
- Buy and sell transaction support
- Database population, audit and migration
- Data conversions and loan on-boarding/set up
- Document management, imaging and indexing
- Document exception management
- Tracking, storage and retention
- Process workflow engineering
- Credit administration support