

WORK EXPERIENCE

Investment Associate

Aug 2021 – Present

- Manage portfolio of institutional grade assets (\$204MM) from cradle to grave, including healthcare, multifamily, hospitality, and retail. Assist managing partner with capital & deal sourcing, due diligence, financing, and leasing.
- Budget & manage OpEx/CapEx, hiring/management of property management, general contractors & 3rd party consultants, marketing strategy, operations & debt covenant monitoring, repositioning, recapitalization strategy, contracts/agreements compliance, dispositions, and drafting ad hoc reports & memorandums.
- Use Excel & ARGUS to create complex cash flow & equity waterfall models for forecasting, valuations, as well as sell/hold/refi and quantitative/qualitative analyses. Use Co-Star & Yardi for market research and maintaining models.

Selected Experience:

- *Build-to-Suit MOBs & Micro-Hospitals (\$150MM)*
 - Increased NOI by average of 30% on all developments below 80% occupancy by finding and enforcing a loophole in investment grade tenants' lease agreements that effectively gave landlord permission to gross-up fixed expense recoveries, in addition to variable expenses.
 - Created intricate property tax forecasting model that was significantly closer to actuals (5% margin of error) than forecasts performed on the same developments by the largest property tax consulting firm in the United States (20% margin of error). Comparison performed on all developments with more than 2 years of property tax actuals.
 - Led negotiation and closing on \$34MM MOB disposition to institutional investor, resulting in 53% IRR.
- *Joint Venture Value-Add Retail Portfolio (\$29MM)*
 - Worked alongside JV partners on CapEx strategy for repositioning as well as determining highest and best use for residual land based on targeted 2.00x multiple.
- *RV Park Development (\$25MM)*
 - Reduced stabilized property tax exposure by 33% by negotiating with county appraiser, pre-tax protest.

Analyst

June 2021 – Aug 2021

- Researched and analyzed market data, property details, and financial information to support high volume tenant-rep brokers in finding the best possible lease packages and locations for clients.

Project Manager

June 2018 – June 2021

- Managed construction of 25+ custom luxury homes (\$140MM)
- Scheduled, supervised, and worked with team of architects, engineers, and subcontractors on simultaneous projects, analyzed budget variances, managed RFP's, and assisted with budgeting based on project scope.

Acquisitions Analyst

May 2017 – Aug 2017

- Assisted with due diligence on a \$30MM value-add industrial acquisition as well as feasibility of adaptive reuse.

EDUCATION

University of Texas at Austin

Austin, TX

Bachelor of Arts in Government / McCombs Business Foundations Program

Class of 2018

- Relevant Coursework: Financial Statement Analysis, Financial Management, Investments, LBO's, REIT Valuation

LEADERSHIP

Texas Real Estate Council

Dallas, TX

Active Fundraising Committee Member

Jan 2023 – Present

Board Member

Sept 2022 – Present

Delta Tau Delta, Gamma Iota Chapter

Austin, TX

Officer

Oct 2014 – May 2018

ADDITIONAL INFORMATION

Credentials: Texas Real Estate Salesperson License | Eagle Scout Award

Interests: Golfing | Hunting | Offshore Fishing | Sports | Smoking BBQ | Volunteer Firefighting