

First Name Last Name

[Phone #] | [Email] | [LinkedIn]

SUMMARY

Multi-disciplined commercial real estate professional with a strong background in asset management and proptech solutions. Demonstrated success in managing a complex portfolio of real estate investments across asset classes and risk strategies. Seeking to make an impact at a commercial real estate firm and execute on asset strategies through a thoughtful, data-driven approach coupled with proven financial analysis expertise.

PROFESSIONAL EXPERIENCE

[Proptech Firm]

[Tier 1 City]

Senior Broker Success Manager

2021–2024

- Developed and managed relationships with leading brokerage teams across 40+ brokerage client accounts nationally; led brokerage-focused initiatives including product concept pilots, feature enhancement programs, and portfolio analytics solutions in order to increase product value, adoption, and retention
- Played a key role in the establishment and growth the Broker Success team—a brokerage focused client advisory team—through the development of the team’s structure, internal processes, and cross-functional workflows resulting in increased data integration, efficiency, and transparency for internal stakeholders
- Spearheaded the evolution of programmatic brokerage partnerships including the development of strategic onboarding plans, tailored training programs, and business intelligence reporting encompassing 2000+ brokerage users across 30+ U.S. markets
- Oversaw business-to-business brokerage sales generating a quarterly average of \$55K in annual recurring revenue for new brokerage business

[Large Lifeco]

[Tier 1 City]

Investment Associate, Asset Management

2018–2021

- Assisted in managing a \$2 billion portfolio consisting of wholly owned and joint venture industrial, office, and retail properties ranging from core to opportunistic investments
- Coordinated with joint venture partners, portfolio management, property management, legal, and leasing teams in order to execute on asset strategies by performing leasing analysis, creating approval memos, completing annual operating budgets, maintaining quarterly valuation models, conducting hold-sell analysis, completing debt compliance reporting, and responding to ad hoc portfolio requests
- Led lease negotiations, performed financial analysis, and created lease approval memos for 12 industrial and office properties totaling 1.45 million square feet and \$125 million in gross value
- Performed IRR and waterfall analysis and created authorization memos for partner buyouts and dispositions for 5 properties totaling 1.88 million square feet and \$215 million in gross value
- Oversaw 10 speculative and build-to-suit industrial developments totaling 6.87 million square feet and worked closely with joint venture and development partners to review and fund equity and debt draws
- Created dynamic Excel dashboards to analyze quarterly leasing, property valuations, and development progress in order to readily track portfolio performance and risk

EDUCATION

[Non Target Private School]

[Tier 1 City]

Bachelor of Science in Finance

2018

- GPA: 3.9 / 4.0
- Dean’s List: All quarters attended

SKILLS

Languages: Native fluency in Spanish

Skills: ARGUS Enterprise, Microsoft Excel, Financial Modeling, Financial Analysis, Contract Negotiation, Operational Budgeting, Strategic Planning, Project Management, Client Advisory, Change Management