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Brief Outline - Real Estate Portfolio Investment Objectives

When building a real estate portfolio it's important to provide immediate income, to diversify asset holdings, and to protect against inflation.

Liquidity, taxes, property management cost, and time horizon are critical factors when investing. In investment approach, the investor may be inclined to provide value add services that may be more expensive and outperform the market, follow market trends, or have an opportunistic approach. Domestic and cross-boarder investments differ in risk, return, yield, and spread.

Investment managers may desire to add value and mitigate risk through real estate diversification in industrial, retail, office, hotel, and apartments. Each product type has different demands. Market approach may vary in growth, stability, value, and cost.

Investment managers should study the market, the size of the product, the political climate, and financial goals. The manager is compelled to produce a cohesive risk and return analysis for each investment stage. Safeguards ensure that exposure is not exceeded. Deal and financial structure directly influence investment cash flow and returns.

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