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Positions in Real Estate Investment Portfolio Management

For portfolio investment real estate, the endowment manager, the investment manager, the operating partner, and the property manager must work as a unit to increase the cash flows and value of the asset. The endowment manager concentrates on strategy. The investment manager unifies portfolio management. The operating partner is responsible for financing and asset management. The property manager maintains the upkeep of the property.

The endowment manager decides where the money will be allocated and creates a plan sponsor strategy. Sourcing, underwriting, and establishing investment partnerships are the focus of the tasks.

The investment manager selects the type of real estate product and geographic allocation of the properties. He/she formulates the real estate portfolio strategy and tactics. In addition, the manager obtains the funds for transactions, negotiates and formulates partnership joint ventures, secures financing for debt and equity. Investment managers also determine the exit strategy. He /she controls major capital and asset decisions and reports on the performance.

The operating partner discovers property opportunities, determines the strategy and creates the business plan. He/she executes the operational plan including acquisition, leasing, development, financing, and sales.

The property manager sets goals and budgeting, performs accounting and financial reporting. They administer the lease; perform billing and collections, procurement, maintenance, tax, and capital improvements. They maintain and improve relationships with tenants.