

2025 Asset Management Meeting

Convene, Venue 42, 5 Times Square, NYC | June 4

WEDNESDAY, JUNE 4

8:00am	Breakfast
8:50am	<p>Welcome Comments & NAREIM Asset Management Committee Update</p> <p>Co-Chair: Haley Donato, Senior Vice President, Asset Management & Finance, Continental Realty Corporation Co-Chair: Eric Lind, Managing Director, PCCP</p>
9:00am	<p>From Acquisition to Disposition: Opportunities, Challenges & Foundational Work</p> <p>Session leaders: Bryan Vrba, Executive Vice President, Asset Management, Blue Vista Capital Partners; Eric Lind, Managing Director, PCCP</p> <ul style="list-style-type: none"> • <i>As an asset manager, are you responsible for writing a business plan for the new investment?</i> • <i>What format do you use and how often is the business plan recast?</i> • <i>How do you determine when to sell and what does that formal process look like?</i> • <i>Through whole-room discussion guided by live polling, attendees will share what's working and what's not throughout an acquisition-and-disposition life cycle.</i>
10:00am	Break
10:15am	<p>Multifamily Rents: Leveraging Manual & Augmented Intelligence Pricing</p> <p>Session leaders: Anil Erdem, Managing Director, BGO; Harold Mesa, Investment Manager, GSA Group</p> <ul style="list-style-type: none"> • <i>Learn about alternatives to third-party multifamily pricing software.</i> • <i>In this session, NAREIM members will share two case studies on how their firms leverage combinations of technology with human know-how to create pricing models that are more resilient in today's market.</i>
11:15am	Break
11:30am	<p>Investor Reporting: A Deep Dive Into Process, Content, Cadence & Roles</p> <p>Session leaders: Joseph Mancuso, Head of Commercial Asset Management, CBRE Investment Management; Haley Donato, Senior Vice President, Asset Management & Finance, Continental Realty Corporation; Cory Saunders, Head of Investments & Portfolio Manager, Fidelity Investments</p> <ul style="list-style-type: none"> • <i>In today's evolving capital markets, investor expectations around transparency and reporting have never been higher.</i> • <i>This session will dive into internal workflows between asset management and capital raising teams, discuss the degree of investor-specific customization, and examine how market conditions and regulatory shifts have influenced the scope of reporting.</i>
12:30pm	Lunch
1:30pm	<p>Tech Stack & AI: Practical Applications</p> <p>Session leaders: Sean Daly, Executive Vice President, American Realty Advisors; Tony Liou, Co-Founder & President, Partner Energy</p> <ul style="list-style-type: none"> • <i>What technological tool has your firm implemented that didn't deliver and why?</i> • <i>How do you vet new tech?</i> • <i>This session examines real-world implementations of CRE-focused software, workflow automation, and AI, through case studies and peer-led discussion.</i>
2:30pm	Break

2025 Asset Management Meeting

Convene, Venue 42, 5 Times Square, NYC | June 4

WEDNESDAY, JUNE 4 *continued*

2:45pm	Strategies for Working With Lenders
<p>Moderator: Nicole Brickhouse, Director of Capital Markets, Continental Realty Corporation Speakers: Tiffany Theriault, Managing Director, Real Assets, Apollo Global Management; Elliot Pessis, Managing Director & Head of Senior Housing Asset Management North America, Harrison Street; Chiara Carter, Head of Credit Originations Real Estate Banking, JPMorgan Chase & Co.; Katherine Canning Winter, Managing Director, Head of Real Estate Asset Management, East & Central US, Manulife Investment Management</p> <ul style="list-style-type: none"> • How are NAREIM members approaching the quickly evolving debt markets? • What are the best strategies for borrowers and lenders to collaborate on loan modifications? • How is the current volatility impacting your broader business strategies? • How are lenders approaching cash out refinance requests? • This discussion aims to give attendees the chance to hear directly from lenders and asset managers on how best to approach the current lending and business environments. 	
3:45pm	End of meeting

2025 ASSET MANAGEMENT COMMITTEE

NAREIM thanks the 2025 Asset Management Committee members, including:

Co-Chair: Haley Donato, Continental Realty Corporation; **Co-Chair:** Eric Lind, PCCP; **Sean Daly**, American Realty Advisors; **Bryan Vrba**, Blue Vista Capital Partners; **Anil Erdem**, BGO; **Cory Saunders**, Fidelity Investments; **Harold Mesa**, GSA Group; Elliot Pessis, Harrison Street; **Tony Liou**, Partner Energy

For 30 years, NAREIM has been the home of real estate investment management benchmarking and best practice education. Our focus is on peer-to-peer networking, where the only conversations are candid and brutally honest. You come to NAREIM to understand what is working and what is not working among peers. NAREIM is where you understand what the industry is really thinking.

NAREIM represents 9 functional areas within the real estate investment management firm, providing in-person and virtual connections for each group throughout the year:

- **Architecture, Engineering & Development**
- **Asset Management**
- **Capital Raising & Investor Relations**
- **Data & Information Management**
- **Executive Officer**
- **Legal, Compliance & Risk**
- **Portfolio Management**
- **Sustainability**
- **Talent Management**

NAREIM CALENDAR 2025		
July 15–16	Talent Management	Boston
September 9–10	Architecture, Engineering & Development	NYC
September 17–19	Executive Officer	Denver
October 7–8	Data & Information Management	Nashville
November 5	Legal, Compliance & Risk	Chicago
November 12	Compensation Strategies	Virtual
December 3–4	Capital Raising & Investor Relations	Chicago

Please note, virtual meetings are organized at the request of functional group committees and will be scheduled throughout 2025. Please check the NAREIM website regularly for more details. www.nareim.org