



A CASE STUDY

MOVING FORWARD, TOGETHER

To meet its ambitious goal of building wealth for the next generation, one Seattle-area family office wanted best-in-class real estate guidance combined with a personal touch. We supplied a tailor-made portfolio strategy, systems for bringing it to life, and a ready ear on the other end of the phone.

BACKGROUND

Our client had a successful record of nurturing promising start-ups, creating a balanced equity portfolio, and acquiring properties. To help meet an ambitious wealth enhancement goal for its next generation, the family wanted to enhance its portfolio with more real estate. Knowing it needed the same high level of expertise that guided its other investments, the family met with several real estate consultants. But one thing always seemed to be missing: chemistry. None of the firms quite fit with the tight-knit family's hands-on, person-to-person style. National firms were too big and impersonal; even some local firms were too "corporate."

And none offered all the services and expertise the family was looking for. That's where Trinity came in.

APPROACH

Our client brought a clear vision of their real estate investing goals; we provided the structure and pathway for bringing it to life. We began by interviewing the family's principal stakeholders to ensure consensus and gain an understanding of what level of risk they were comfortable with. Then we developed a comprehensive, long-term strategy based on their preferences. We also helped the family implement several best practices to improve oversight of their assets and support steady progress toward their objectives.

OUTCOME

Today, the family is moving toward its goals. To strengthen day-to-day portfolio management, we've helped them adopt a more systematic approach, including standing meetings with property managers, annual reports to family stakeholders, and sophisticated analytical tools for improving leasing and decision making. We're also providing mentoring, so that the family can more confidently make and manage real estate investments in the future. *"If I had to come up with one word describing how Trinity helped us, I'd say 'execution,'"* one family member says. *"We provided the enthusiasm and the vision. Trinity brought the strategy and discipline."*

SERVICES PERFORMED:

Strategic Advisory | Portfolio & Asset Management | Investment Strategy
Value Optimization Consulting | Portfolio Performance Review
Family Governance & Structuring