

CASE COMMERCIAL'S LEASE ADMINISTRATION



Company Overview

CASE Commercial Real Estate Partners (“CASE”) was founded 25 years ago and has evolved into a full-service, Texas-based company with worldwide capabilities. CASE Commercial Lease Administration Services, a woman-owned entity of the company, works in tandem with agents and brokers to perform the critical lease administration function. Today, CASE employs more than 75 real estate professionals in Dallas, Fort Worth, Austin, and San Antonio.

Through a partnership with TCN Worldwide, we are connected to a consortium of leading real estate firms comprised of over 1,200 brokers and salespeople in more than 200 locations. As the preferred lease administration providers for the network, we deliver seamless services that align clients’ real estate with their business goals. This affiliation enables us to provide integrated solutions across four continents while maintaining our boutique style of operation.

Return on Investments

On average, for every \$1.00 paid in lease administration fees, our clients have realized more than \$1.50 in savings excluding labor cost reductions. Additionally, our team has an impeccable client satisfaction record.

Other Advantages of Outsourcing

At CASE, our experienced and well-trained real estate professionals are our number one asset. Our transition expertise, customer service focus, processes, checks and balances, savings and dedication to going above and beyond to meet the needs of our clients set us apart from the competition. Some of the advantages of outsourcing to CASE Commercial Lease Administration Services include:

- Access to services not usually available to users with a limited number of locations
- Expert personnel assigned to your team, reducing the Human Resources burden and cost of sourcing, training and retaining qualified personnel
- Mitigation of risk with six-sigma type accuracy
- Real time access to accurate portfolio information and documents
- State-of-the-art, web-based technology which gives physicians access to lease abstracts and critical date reporting
- Scalable solution that can grow or shrink based upon needs

Physician Strategy Group

Physician Strategy Group members have a desire to reduce lease related costs, which are second only to personnel costs. CASE offers affordable lease administration for members who typically lease only a few locations. We will partner with physicians to accomplish the following in a short 30 to 45 days:

- Gather legal documents, manage critical dates and issues, and more
- Abstract all leases and amendments
- Perform desktop auditing on year end reconciliations
- Validate data abstracted, establish reporting package and processes
- Train clients personnel on database use and critical date notification

Lease Administration Database

CASE recommends using Harbor Flex, a successful database for healthcare clients. This application is web-based, easy to use, flexible and secure and provides comprehensive reporting. In addition, users have full access at any time through an Internet connection and web browser without a need for internal IT resources.

Fees

Transaction Management	Fee/Commission
Broker Opinion of Value	\$500
Real Estate Commission (Paid by Landlord with any deficit paid by PSG physician)	\$5,000 minimum. Broker Opinion of Value fee waived if commission exceeds \$10,000
Lease Administration Transition Tasks	One-Time Transition Fee
Database Set-Up Fee	Waived
Document Abstraction and Legal Document Scanning	\$250 / Leased Record
Report Customization (Over 50 Free Standard Reports Available)	\$175 / Hour
Ongoing Administration	Annual Fee Per Record
Annual Database Access (Desktop Audit & Critical Date Reporting)	\$225 / Lease / Year
Ongoing Abstraction	\$200 per Lease; \$75 per Amendment
Incentive Fees	Percentage of Savings
Cost Avoidance or Recovery	25%
Future Cost Avoidance	0%

Scope of Work

The select lease administration services are comprised of critical date management with desktop audits, including:

- Abstracting new documents into Harbor Flex
- Performing annual desktop audits of CAM, Taxes and Insurance
- Providing critical date reporting

CASE also offers a broad range of transactional services which includes lease acquisition and renewals to consistently deliver below-market terms and conditions. As advisors and consultants, we can make recommendations to meet varying network physician needs and as specialists in the real estate healthcare industry, we can assist physicians with a diverse range of transaction services including site selection, lease negotiation, and market analysis. Drawing upon our strategic partnership with TCN Worldwide, we can accommodate any need in any market.

Contact Information

For information about how CASE can help Physician Strategy Group members with lease administration or real estate transaction services, please contact:

Karen Loss
Lease Administration
972.759.7861
kloss@casecre.com

John Rischard
Lease Administration
972.759.7857
jrischard@casecre.com

Chris Barnet
Transaction Services
972.759.7835
cbarnet@casecre.com



14785 Preston Road, Suite 750
T: 972.759.7800 | F: 972.759.7900
www.casecre.com