



Portfolio Valuation Management Services

Colliers International Valuation & Advisory Services (“CIVAS”) has a dedicated team of Portfolio Valuation Directors (PVDs) focused, trained and committed to delivering results when valuing property portfolios.

Clients demand consistent results and ease of access and coordination. We have listened and designed processes to deliver on our offer. We have a proven track record and the resources to deliver results consistently on time globally.

PORTFOLIO VALUATION DIRECTORS (PVDs)

The goal of the PVD is to coordinate and deploy our resources culminating in a successful assignment. It is also to assemble and manage the right team of appraisers for each assignment.

The PVD’s responsibilities include:

- Oversight of template set-ups
- Dissemination of appraiser information
- Coordination of “requests for information”
- Project tracking
- Compliance of client specific requests and forms
- Portfolio consistency
- Preparation of portfolio roll up and data tapes
- Assurance of overall delivery timing
- Oversight/coordination of the client review process

Once engaged, the PVD communicates and coordinates the execution process:

- Hand off steps include introduction with the client, assigning appraisers and implementation of CIVAS technology tools
- Key dates and other process milestones are communicated to all applicable parties
- PVD acts as the primary client contact and coordinates internal and external communication
- PEF spreadsheet will be utilized on an ongoing basis to facilitate portfolio management

Contact Our Portfolio Valuation Directors

Morgan Turnbow, MAI

EMD | National Operations
+1 212 355 1029 Phone
Morgan.Turnbow@colliers.com

Robert Steed

Senior Valuation Specialist
+1 916 724 5529 Phone
Bob.Steed@colliers.com

Justin Butler, MAI

Senior Housing & Healthcare Specialty Practice
+1 941 210 5004 Phone
Justin.Butler@colliers.com

Jason Schultz, MAI

Valuation Services Director
+1 813 871 8530 Phone
Jason.Schultz@colliers.com

Andrew Renfro, MAI

Senior Valuation Specialist
+1 615 610 4732 Phone
Andrew.Renfro@colliers.com

colliers.com/valuationadvisory



Assignment Highlights

NOTABLE PORTFOLIO ASSIGNMENTS

CLIENT	PROPERTY TYPE	NUMBER OF PROPERTIES	LOCATION
UBS	Ruby Tuesday Restaurants	269	Nationwide
Stoneweg - Varia	Multifamily	35 & 37	Nationwide
Wells Fargo	"Mega Facility" Portfolio - Various	52	Nationwide
Q10 iCAP Realty Advisors	"SCG Portfolio" - Shopping Centers	17	Southeast US
Q10 iCAP Realty Advisors	"South Coast Retail" - Shopping Centers	16	Southeast US
Goldman Sachs	"Integer Portfolio" - Industrial Manufacturing	10	Nationwide
ELRH Investments/ELCO	"Brookfield Carolinas" - Multifamily	23	NC & VA
ELRH Investments/ELCO	"American Landmark" - Multifamily	12	FL & TX
Istrin Family Estate	Estate Purposes - Net Leased	56	Nationwide
HFF	HSRE Student Housing	11	Nationwide
National Select Funding	Hotels	26	Nationwide
Berkadia - VOYA	U-Haul Self Storage	36	Nationwide
LoanCore Capital	"Hyde Park" - Multifamily	42	Chicago
New York Life	Self-Storage	22	California
The Wolfe Company	Multifamily	14	California
CCRE	MVP Parking Portfolio	8	Nationwide
Goldman Sachs	Multifamily	11	FL, TX, & CA
BioMed REIT	Healthcare	65	National
Citibank	Self-Storage	66	National
Community Hospitals	Healthcare	15	New York
HSBC	Office, Retail, Industrial, Hospitality	103	Mexico
Goldman Sachs	Multifamily	85	California
ARC Trust	Net Leased	55 & 115	Northeast US
CCRE	"NGP V Fund" - GSA Office	42	Nationwide
CWCapital/ColonyCapital	Office & Industrial	22	Nationwide
LACERA	Mixed-Use, Business Park, Industrial	26	Nationwide
Prime Finance Partners	Industrial, Retail, & Office	25	Nationwide
Terra Group	Hotel Ground-Lease	10	IL, NC, TX, AZ, GA
PENSYN / CANAM	Industrial	19	Nationwide
Wells Fargo	"SunTrust Southeast Portfolio 2" - Multifamily	21	Eastern US
Eaton Vance	Rolling Engagement - Office, Industrial, Multifamily	Varies	Nationwide
CWCapital	NGP Rubicon GSA Office	10	Nationwide
HPI Group	GSA Office	18	Nationwide
CapitalOne	"Heartland" - Medical Office	71	Nationwide
Berkadia	Atlantic Self-Storage & Retail	27	Florida
TA Associates	Rolling Engagement - Office, Industrial, Retail	Varies	Nationwide
Wells Fargo	"CIVF II: Tranche IV" - Industrial	49	Nationwide
Capital One Bank	Medical Office	71	Nationwide
Pierce Education Properties	"PEP-Cactus LLC" - Student Housing	9 & 13	Nationwide
Wells Fargo	"Professional Resource Development" - Dental Offices	65	Nationwide
Alo Star Bank of Commerce	Data Centers	9	Nationwide