



FORE

FAMILY OFFICE REAL ESTATE INSTITUTE
Executive Education

MANAGING THE FAMILY OFFICE REAL ESTATE PORTFOLIO

Build a foundation in real estate portfolio management that is essential for family offices, family members family office executives and industry professionals. You'll prepare to make better real estate investment decisions – and play a bigger role in developing your family's real estate portfolio. This program will help you:

- Understand the implications of Real Estate Market Cycles which can help you make informed decisions based upon current economic conditions.
- Understand how to use proper legal and tax strategies in a real estate portfolio
- How to set up an investment council, and how it fits into the overall planning for a family office
- Understand how to underwrite a potential sponsor & investment.
- Learn from the Harvard Case Study Method on a real estate investment.
- Structuring, management and analysis of real estate portfolios & how it fits into a family offices total investment portfolio.
- Engage in productive discussions with other family offices, family members, family office executives and industry professionals.

WHAT YOU WILL LEARN

Through faculty presentations, case studies, interactive classroom sessions, and structured and informal group activities, you will explore the fundamentals of real estate, as well as the managerial context in which strategic choices require investor support. Topics include

- Portfolio Management
- Due Diligence and Underwriting (property & sponsor level)
- Tax Planning & Structures
- Family Investment Committees and Family Councils
- Property Types
- Real Estate Market Cycles & Analysis
- Investment Strategies
- Case Studies
- Real Estate Finance & Investment



Date:
October 2nd - 4th

On Campus:
Held at the University of Denver

Cost:
\$6,500 on Campus



"We are very excited to have the Institute for Family Office Real Estate to provide education for family offices and the critical challenges facing family office real estate portfolios and real estate businesses."

Glenn R. Mueller, PhD
DU/Burns School Professor and
Academic Director of FOREI

EDUCATION. REAL ESTATE. FAMILY OFFICE RELATIONSHIPS.

Real estate represents the largest generator of income and wealth for families outside of the businesses that initially earned them their fortunes. At the Family Office Family Office Executive Education Program, you will be fully immersed in an experience that will include learning practical applications, building a network of other family offices, family members, family office executives, and industry professionals from around the world. You will be engaged in programs led by the University of Denver, Harvard, Wharton and University of Chicago Faculty members as well as other top faculty and leading industry experts from around the country. It's an experience that will provide knowledge that can be used for generations to come.

Valuable Format– Interact directly with Professors and Family Office Industry Experts bringing their latest research and valuable knowledge to the classroom. Participants gain insight from real estate market analysis to portfolio construction to tax, legal and financial management for real estate assets. Gain insights into solving some of their most challenging problems while creating new relationships with other family office professionals.

Learning experience– the institutes objective is to have participants consisting of family offices, family members, or family office executives to learn from discussions, case studies, lectures, and collaborating with other attendees; you'll be able to deepen your knowledge and understanding of real estate while also learning from others.



ADMISSIONS

We admit candidates to specific sessions on a space available basis and encourage you to apply as early as possible. Although programs have no formal educational requirements, admission is a selective process based on your affiliation to the family office industry.

FOR MORE INFORMATION

Admissions Family Office Real Estate Institute

Admissions Director

Tel: (720) 722-5542

Email: admissions@fore.institute

The Family Office Real Estate Institute does not discriminate against any person on the basis of race, color, sex or sexual orientation, gender identity, religion, age, national or ethnic origin, political beliefs, veteran status, or disability in admission to, access to, treatment in, or employment in its programs and activities.

Programs, dates, fees, and faculty are subject to change. @2024 Family Office Real Estate Institute