



FALL 2019 EDITION

# THE TOP 100 PEOPLE IN REAL ESTATE

FEATURING SUSAN FIXSEN, PACIFIC OAK REAL ESTATE



**BUSINESS OWNER,  
REALTOR, BROKER,  
NEGOTIATOR, LEADER,  
COMPETITIVE GOLFER  
AND PHILANTHROPIST.  
IT'S NOT 8 PEOPLE,  
JUST THE INCREDIBLE  
SUSAN FIXSEN.**

*-STORY ON PAGE 15*



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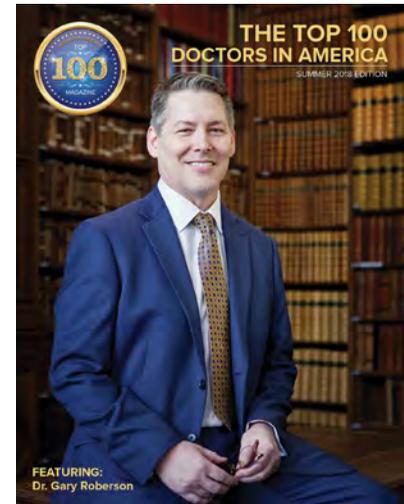
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The staff of *The Top 100 Magazine* would like to express their gratitude for having the privilege of working with the brightest, most accomplished, and esteemed professionals in real estate and related fields.

Through the combined efforts of our account directors, writers, production staff, and artists, as well as the cooperation of everyone who is featured in this publication, I believe we are presenting an inspiring and exciting account of the 2020 real estate landscape.

I know that our readers will be equally impressed by these stories and appreciate the tremendous fortitude, dedication, and perseverance of these individuals, along with the many sacrifices they have made in the pursuit of their dreams.

It is my sincere wish that each and every one of these amazing professionals continue to experience success and my pleasure to present *The Top 100 People in Real Estate* magazine.

*Joseph Nunziato*  
CEO, Redwood Media

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# 2019

# THE TOP 100 PEOPLE IN REAL ESTATE

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## **CHRIS BUSTOS**

Owner, Bellator Real Estate LLC

As the CEO and owner of Bellator Real Estate LLC, Chris Bustos continues in his father's legacy as a successful real estate investor in the Houston area.

Inspired to pursue a career in real estate by his father, who was a successful real estate investor in Houston, after initially pursuing a degree in engineering at Texas A&M University, Chris decided to change his focus to real estate. Today, under his expert direction, Bellator Real Estate is one of the leading real estate investment firms in Houston.

Bellator Real Estate LLC focuses on residential and commercial real estate properties for both the buyer and seller market as well as high profile investments. While the firm was only established in 2016, Bellator Real Estate LLC has closed over 100 million dollars in sales, with a large percentage of those earnings coming from the past year. The business has continued to grow and expand closing 20 and 40 million dollar deals in the past few months with the anticipation of hitting a 500 million dollar sales mark by the end of the year.

Chris credits the continuing success of his business to an elite team of real estate advisors and consultants that he personally trained and mentored. He explains, "We have been able to

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**"The positive relationships that we develop with clients is not only paramount to our success, but the very foundation of our business model."**



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train our team on the way we do business – with the highest level of service provided to our clients." He enjoys working with and mentoring his team on analyzing deals and making the best offers on properties and he adds, "In ten years, whether they are still working for me or they are on their own, they will have the skills and expertise to conduct business in the best possible manner."

On a day-to-day basis Chris is involved in all aspects of his real estate transactions, working with sellers, buyers and investors from the initial stages of a deal to closing. He explains that another attribute of the business includes, "The positive relationships that we develop and nurture with our clients."

While the business specializes in commercial and multifamily properties within Houston and other areas of Texas, they are expanding their market to include retail properties, shopping centers and office buildings.

Bellator Real Estate LLC has experienced exponential growth within this last year and it has allowed Chris and his team to focus on the structure and foundation of the business which in turn allows them to expand into additional diverse markets.

In addition to his professional accomplishments, Chris is involved with charitable organizations and enjoys traveling, working out, sports and the outdoors.



**Parand Jalali** uses her diverse knowledge and experience as an entrepreneur to successfully manage her clients' investments and adeptly run her business, Bellator Real Estate LLC, a brokerage and investment firm that she founded with her husband in 2016.

Bellator Real Estate LLC focuses on residential and commercial real estate properties for both the buyer and seller market as

well as high profile investments. While the firm was founded only three years ago, Bellator Real Estate LLC has closed over 100 million dollars in sales, with a large percentage of those earnings coming from the past year.

Parand explains that the business continues to grow, closing 20 and 40 million dollar deals in the past few months and they anticipate hitting a 500 million dollar sales mark by the

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**PARAND JALALI**  
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end of the year. As the firm founder and a consultant, Parand works with a diverse selection of clients including corporate developers, private investors, and other real estate agencies. In addition to real estate, the firm also focuses on financial investments and assist clients with growing and managing their financial portfolios.

While Parand is a highly skilled real estate consultant, brokering the best deals and working with her clients to buy and sell elite properties in the Houston area, she also has in-depth experience in the much larger, financial investment industry. As an experienced investment consultant, Parand works closely

with her clients to research and analyze the best investment opportunities available. She is a focused investor that relies on her analytical research skills to help her clients make the best decisions when it comes to investing their money.

With her skills and hands-on experience in real estate, finance and the investment industry and as the owner of a highly successful firm, Parand Jalali's goal is to build a name for herself in the world of finance and investments. With the successful career and business path that she has been following so far, it is clear that she is on her way to reaching that goal.



## JOE CURTIS

CHIEF OPERATING OFFICER

**pango group**

WHERE REAL ESTATE HAPPENS

Joe Curtis embodies a belief system that he leads and lives by: create and implement strategic systems backed by empowered and accountable individuals who are passionate about the company's mission, vision and values.

Joe served as executive VP of sales and business development for his first three years at Pango Group. During this time, he transformed the sales department by integrating accountability, honing in on the team's skillset, and implementing cohesive processes. The result was monthly revenues quadrupling in a brief period.

Due to his impeccable leadership skills, immense success with leading the sales team, and understanding how integrity and accountability play a factor in the bottom line, he was promoted to COO and has held this position since 2016.

Pango Group is a family of companies that together, are the leading California-based settlement service experts. With its extensive family of brands, Pango Group is able to provide a full suite of services, including escrow, notary, insurance, document archiving, and equipment leasing. To date, Pango Group owns and manages 20 offices throughout the state of California with a staff of over 50 escrow officers and 250 employees.

The organization's brands include Glen Oaks Escrow, CV Escrow, American Trust Escrow, Antelope Valley Escrow, California Elite Escrow, Mosaic Signing Services, Document Archive Solutions, California Settlement Services, and VOI Insurance.

The company is so much more than a settlement services organization. At its core, people come first. Pango Group's mission statement is to run exceptional real estate service businesses that enhance the lives of the people, partners, and communities it serves.

Those aren't just words on a piece of paper. It's a living and breathing mission that the team works diligently to execute through each and every interaction they have. And, it's clear the company is doing just that, given its been named one of the *Best Places to Work in Los Angeles* for six years running.

Furthermore, Joe Curtis makes no exception to taking this mission very seriously. His transparent and collaborative leadership style has been a significant contributing factor to humanizing systems and processes, which has allowed him to develop new business entities, strengthen existing ones, and redefine the importance of people.

As Pango Group continues to grow, it has developed partnerships with experts in Silicon Valley to provide advanced technology to its real estate partners. Recently, it successfully completed a cryptocurrency real estate transaction and helped someone purchase a house with bitcoin.

Prior to his role at Pango Group, Joe acquired over fifteen years of experience in the escrow industry. He attributes his success and the success of the business to living by the motto, "If you focus on people and give them clear expectations, the outcomes take care of themselves."

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# Jodi Avery

## Broker at Keller Williams

A deep admirer of Mother Theresa and her works, Jodi Avery lives by the quote, “Let no one ever come to you without leaving better and happier. Be the living expression of God’s kindness: kindness in your face, kindness in your eyes, kindness in your smile.”

**Jodi Avery** has a true passion for helping others – both personally and professionally. As a highly successful real estate broker with Keller Williams Realty, Inc., she has spent her career providing the highest level of service to her clients, coaching and mentoring fellow agents, achieving skyrocketing sales, innovating business practices and leading countless philanthropy and charity efforts to serve fellow members of her community.

While she has been practicing real estate for over twenty years, Jodi joined Keller Williams Realty in 2011 and in only six years, achieved a 945% increase in sales revenues. She was consecutively named the *#1 Individual Real Estate Agent* for Keller Williams Realty from 2013-2017. As an agent who truly goes above and beyond in so many aspects, Jodi explains that it doesn’t matter whether she is selling a house worth \$50k or \$50 million, it is not about the money; it’s about the relationships made along the way. She explains, “Some of my greatest rewards have come from the relationships built with clients. It is my nature and commitment to work with integrity, honesty, and sincerity. As a seasoned and trained negotiator, I help my clients get the most money for the properties they sell and the best purchase prices for the properties they intend to buy.”

Jodi has led the way in marketing, creativity, and sheer enthusiasm as she encourages a true celebration after every closing that she attends, getting everyone to jump and shout and do a “happy dance.” Jodi Avery’s “Happy Dance” has even gone viral on the internet – getting over 50k views. Jodi has carved her own unique path in real estate because she is passionate about what she does and the people she serves. In 2011, she wrote and published a guide called, *Jodi Avery’s A-List*, which gave clients a list of top service providers in the Tampa Bay area. Over time, the publication has grown to include favorite restaurants and other hot spots, with over 50,000 copies printed every year. She recently created the Giving Matters Initiative, which focuses on recycling common household goods, clothing, and furniture and turning them into impactful donations to local charities in need.

A single mom of four children, Jodi also volunteers her time and effort with numerous community organizations, including the Girl Scouts of West Central Florida, Working Women of Tampa Bay, Safety Harbor Chamber of Commerce, and 100+ Women Who Care. She also dedicates herself to support the Know Tribe, an



organization that highlights female business owners who are making strides in their careers and community.

Jodi ranks among the top 1% of realtors and was featured on the cover of *Top Agent Magazine* for April 2016 and named *Businesswoman of the Year* in 2016. As a result of countless hours serving the community, Jodi received the *Humanitarian of the Year Award 2018* from the Florida Realtors Organization and was featured as the lead story in *Florida Realtor Magazine* in July 2018 for her innovative business practices.

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# Suzy Truax

An adept negotiator and tech-forward real estate professional, Suzy Truax serves on the board of directors for EXP World Holdings (the parent company of EXP Realty and is the chairperson of EXP Realty's Agent Advisory Council. With over two decades of diverse real estate expertise, Suzy holds broker licenses in California, Pennsylvania, and Florida, and is also a licensed salesperson in New Jersey. She leads her sales team, The Smart Move, in the San Francisco Bay Area.

**Q: How did your journey into real estate begin?**

**A:** I began my career in residential sales in suburban Philadelphia as a way to supplement the family income when my children were still small. Fortunately, I experienced a high degree of success right away. I was number one in sales volume at my company by my fourth year in business. In 2006, I moved over to the franchise growth and brokerage management side of the business and launched a major national real estate franchise in Philadelphia as a team leader.

**Q: What brought you to California?**

**A:** I moved to California in 2014 and helped launch a national real estate franchise in San Francisco. Through my success in that role, I was tapped to facilitate a turnaround of a flagging real estate company in Silicon Valley. That's when I serendipitously discovered the EXP business model.

**Q: What is the EXP business model?**

**A:** EXP Realty's revolutionary virtual-office business model eliminates the expensive overhead of a traditional brick-and-mortar brokerage. The savings are passed along to the agents, allowing them to keep 80-100% of their commissions. Agents also have the opportunity to participate in a variety of performance and growth incentives, such as revenue sharing and equity in the company.

**Q: How did you make this discovery?**

**A:** At first, I was doing reconnaissance on the competition, as I was employed at another real estate company at the time. I knew little about EXP but was quickly intrigued by what I discovered about their business model. I thoroughly enjoyed my team leader/CEO role, the comp and benefits were

decent. But after doing due diligence on EXP, I handed in my resignation and took a leap of faith to start over as an agent.

**Q: How has your career been with EXP? Was it worth the risk?**

**A:** I joined EXP due to the pioneering agent-centric business model, plus the incomparable integrity of the leadership. Within the first days, I gained access to the massive library of archived and live training and education. Last year I had my best financial year in the business. But more importantly, I had my happiest year in business, and it has continued! So, yes, it was definitely worth the leap of faith - my only regret is not discovering EXP sooner.

**Q: What would you say is the best part of working at EXP?**

**A:** Seemingly ironic for a remote work environment, our connection and collaboration are unparalleled. Every day, via multiple platforms, I'm able to communicate and learn from 23,000 other agents, and my broker! We have over 2500 interest groups in EXP Workplace...EXP Power Girls, EXP Referral Network, Latino EXP, and so many more. Every week, top national agents teach classes on best practices and the secret sauce of their success within EXP World, at no cost to the agent. Via our stock compensation and revenue sharing programs, agents have an avenue to retirement, in an industry where no such option exists. Additionally, EXP is rolling out health insurance to agents, beginning in 2020. So, it's easy to see why it's the fastest growing real estate company of all time.

**Q: Explain EXP's Agent Advisory Council, and tell us about your role.**

**A:** The founder of EXP, Glenn Sanford, and CEO, Jason Gesing, recognized that our rapid growth created a challenge for staying in touch with the agents' needs. To solve that, they

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Throughout her career, Suzy has mastered multiple aspects of real estate:

**sales,  
education,  
investment,  
corporate  
relocation,  
& coaching.**

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However, she says that one of her most important roles and her passion project is

**EMPOWERING WOMEN.**

created the Agent Advisory Council, which is a body of twelve agents, charged with keeping their finger on the pulse of the agent, and to be the voice of the agent population at the leadership level. At EXP, the agent is the most important customer; if EXP arms and equips agents with the best tools and takes care of their needs, everyone benefits. I was selected as chairperson of the first Agent Advisory Council. In August of 2017, I was invited to join the board of directors of EXP World Holdings.

**Q: Aside from real estate, what is your greatest passion in life?**

**A:** My big “why” is my children, but since they are grown, my passion in life is to empower and elevate women. One way that I do this is by speaking to women on how to invest in real estate, by breaking it down and answering questions for them. I created a Facebook group called, *Wired Women Investing in Real Estate*, when I recognized a pretty major blind spot in myself. I realized I spoke to my two sons about becoming entrepreneurs and owning businesses, yet I failed to have those same conversations with my daughter. Social conditioning or not, I recognized the need for change. For women to have their best lives, they must be in control of their financial destinies, and building wealth through owning real estate is one path. I enjoy coaching women in business by mentoring those who express an interest in leadership positions.



## DESI C. RODRIGUEZ, MSIRE BROKER/OWNER, STRIKE REALTY

As a successful broker and the owner of Strike Realty, Desi Rodriguez uses his knowledge and experience in the real estate industry, to train his agents and turn them into expert negotiators and top producers.

Desi is the founder and broker of Strike Realty, a real estate firm based in Miami, Florida. Strike Realty is a full service firm that handles all aspects of real estate, however all of the agents specialize in different fields, so that their clients, whether they are buyers, sellers, or investors, are always dealing with an expert.

Strike Realty opened in September 2018 and has been rapidly growing since its inception. Strike now has over 25 real estate advisors despite the fact that they only started actively recruiting in late July.

While Desi oversees the day-to-day operations of the business, he adds that he has not stopped production and is still a “producing agent.” He prides himself and his business with providing a rigorous training program for all of his agents, where they learn to become true real estate advisors. Desi opened Strike University, where he is a real estate instructor, who focuses on offering the best training to his students; far

beyond what is normally provided, and adds, “In Florida, you can go to school for a week and get licensed.”

Prior to establishing his own business, Desi was recruited by a real estate startup based in Silicon Valley that wanted to bring technology into the South Florida real estate market to help them build a team and establish their business. In that role, he recruited over 100 agents, who subsequently produced hundreds of transactions. The business was eventually sold and Desi decided to use his expertise and implement the same principles that made his latest company a success, in order to build his own brokerage.

Desi received a double major B.B.A. in real estate and management and an M.S. in international real estate (MSIRE) from Florida International University. He has achieved numerous designations and certifications, including ABR (Accredited Buyers Representative), ePro, PSA (Pricing Strategy Advisor), SFR (Short Sales and Foreclosure Resource Certification) and SRS (Seller’s Resource Specialist).

He attributes his success as a real estate broker and a business owner to living by the motto, “I like to win for my clients but do so with a calm demeanor and a smile.”



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## GABRIEL AMEDEE, CLHMS

Co-Founder/Director of Operations: Strike Realty  
Managing Partner: Gold Homes LLC

Gabriel Amedee, CHLMS, believes that you should strive to achieve the best results in everything that you do – both professionally and personally. As the director of operations for Strike Realty, and a managing partner with Gold Homes LLC, Gabriel works closely with home buyers and investors, locating and negotiating the perfect residential or commercial property that meets all of their needs.

While Gabriel focuses on offering the best properties and investments to his clients, his true passion is mentoring and developing new agents. He loves to offer his knowledge and guidance to help new agents become top producers and adds that his philosophy to “strive for the best” overflows to life outside of real estate and adds, “It really is a lifestyle. Striving for the best in everything that you do and making smart decisions in your life whether it is your career, health or personal growth – all relate to your overall role in production.”

Founded in 2018, Strike Realty is based in Miami and is a full service real estate firm that handles all aspects of real estate and provides elite service to buyers, sellers and investors. Gabriel manages day to day operations for the business and explains that they focus on taking an analytical approach to the market to ensure that each client gets the home or the property that they want at a price that makes sense.

Gold Homes LLC is a unique real estate company that assists sellers in difficult situations who often cannot afford to sell using traditional methods. The experienced staff at Gold Homes assists sellers in difficult situations including foreclosures, property inheritance (probate), divorce sales, bad tenants and vacant or distressed properties. They work directly with investors who will purchase these properties.

Gabriel explains that they focus mainly on small multi-family units which are a more attainable investment for first time investors and adds, “We essentially help small mom and pop investors, people looking to get a start, or people who just need their hand held through their first few investments.” He really focuses on empowering his clients by offering them the guidance and knowledge that they need to understand the market and independently make good decisions.

Prior to his current business roles, Gabriel managed and



**“We essentially help small mom and pop investors, people looking to get a start, or people who just need their hand held through their first few investments.”**

recruited a team of over 100 agents for another real estate and tech startup where he gained vast knowledge and experience in operations, marketing and investment strategies. After the business was sold, he was confident in his leadership & investment experience and pursued his new venture as a real estate broker.

Gabriel received a Bachelor of Science degree in real estate from Florida International University (FIU), where he was also the vice president of the Real Estate Association. In addition to his passion for negotiating in the business world, Gabriel is a competitive bowler and marathon runner while also sitting on the Board of Realtors.

# THIS IS ARON G.

MEET THE CHARISMATIC VISIONARY WHO IS TRANSFORMING A SMALL PAINTING



Tell us about your real estate development business, Property Halo Development.

Our team leverages over 60 years of combined real estate development experience and in-depth knowledge of the Texas real estate market to source both on and off market investment opportunities. The heart of our team is native to Frisco and has an intimate pulse on the market. We offer a one-stop shop for investors who want to limit liabilities and get involved in Texas development.

The team that I constructed at PropertyHalo Development (PHD) has been responsible for over \$2.1 billion worth of building development across the nation and \$500M in Frisco and Prosper. Essentially, they know what they're doing, and it shows. We seek the right deals through a vigorous effort of due diligence, we develop the site plan, pre-lease and pre-sale as much as possible, and finally, we work very closely with city planners and manage contractors to execute construction. Right now, we are focusing specifically on Frisco, Texas, because of the amazing growth that is going on in that locale.

**Why are you focusing on the area of Frisco, Texas?**

There are several reasons that this area is in the midst of a \$3 billion real estate development boom. The PGA of America is relocating its headquarters from Florida to Frisco. Jerry Jones recently moved the Dallas Cowboys headquarters and training facility to a property in Frisco called the Dallas Star. Dr. Pepper is also relocating their main office to Frisco, right next to the Dallas Cowboys headquarters, and Uber is working to launch a fleet of unmanned flying drones to transport people to the DFW airport. The first place in the world was Dubai, the second will be Frisco.

**How has the company grown since its inception?**

We started as Texas Home Design, a commercial painting company, in 2006. We moved into full-service general contracting, new construction, and handling large loss insurance claims for many of our clients. Through referrals we gained more clients and expanded into projects and restorations for various properties, including multifamily and commercial spaces across the states of Texas and Oklahoma.

As of April 2016, Texas had a little over \$2 billion in losses from multiple hailstorms. Many property management companies we had worked with asked us to assist with their overwhelming insurance claims, so in 2016, we took on restoration and reconstruction work representing more than \$15 million in insurance losses. In 2017, we began building SPEC homes and retail centers as a



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# LOFTON

COMPANY INTO A \$100 MILLION DEVELOPMENT ENTERPRISE IN JUST 10 YEARS. |

general contractor. By 2018, we absorbed a Texas-based development group who had built over a half billion dollars of real estate, including SPEC homes, office spaces and commercial retail, and industrial spaces. By the end of that year, we brought a full support staff on board (including 150 construction techs across the state) and we have been successfully working together for over a year now.

## What separates you from other professionals in your industry?

I had a successful career as one of the top mixed martial arts fighters in the world before starting my business, and many of the lessons I learned help me be a better real estate developer. For example, all people matter. I treat everyone I meet with the same respect. I take time to stop, shake hands and talk. I also learned to seek out people who naturally gel with me, people who are on the same wavelength. That synergy makes work fun and it can be the difference between a mediocre project and a great one. Without sounding cliché, I enjoy what I do. I really love it, so it doesn't feel like work. Something else that drives me is being told "NO" or "you can't or should not do that." My personality type is to kick the door in and hit the ground running. I also surround myself with talented people whom I can trust. I genuinely care about my team and the culture I breed is a safe, supportive environment, which is why people enjoy working for me. Every quarter, we bring everyone together across the state and we host a get-together and party with some giveaways and prizes. I always give thanks and remember it is because of them that I am here.

## How do you see your business expanding in the future?

We have a new development under contract with Property Halo Development. This project, coined *Three Corners Plaza*, has a \$31M budget for a 26-acre development in Frisco that includes retail space, a 25,000 square foot Texas Family Fitness space, and a gas station, plus roughly five acres of pad sites. What really stands out about the Property Halo team is that they have been able to generate commitments for pre-leases and sales of almost 50% of this site before breaking ground. This site is less than 4 blocks from a brand new, state-of-the-art Prosper High School that will be opening in 2020. We are in the process of raising capital and closely monitoring the pulse of off-market deals in Frisco for future endeavors close to PGA Headquarters. I always knew that at some point we would grow into a multi-faceted development company and every day I get a kick out of seeing how our hard work and dedication have brought that plan to fruition. We are really just getting started; the future holds so many possibilities and opportunities for us to make our mark on real estate development.



“ MY PERSONALITY TYPE IS TO KICK THE DOOR IN AND HIT THE GROUND RUNNING. ”



# ANTHONY S. BEHAR

Partner/Executive VP at Major Properties

Anthony Behar has comprehensive knowledge of and elite experience in the commercial and industrial real estate industry. A native of Los Angeles, he has spent that past 17 years working at Major Properties, one of the largest independent commercial, industrial and investment real estate brokerages in the Los Angeles region. Along with his firm, Anthony has a high level of experience and expertise in the Los Angeles area – especially in the commercial industry. Major Properties is very focused on and familiar with the community, and they are often referred to as the “Downtown Los Angeles Experts.”

Major Properties has a long and successful history, with over 54 years in business as a boutique brokerage firm, representing property owners, investors, developers, landlords, and tenants on the acquisition and disposition of commercial and industrial real estate properties. Anthony has sold or leased over one million square feet of space. He has been a consistent top performer, earning *Major Properties’ President’s Award* in 2005 and 2010 and *Salesman of the Year Award* in 2007, 2009, 2014, and 2015.

In 2017, Anthony was promoted to executive vice president and partner at Major Properties. He explains that it was truly an honor to become the first non-family member to be added to the corporate management team in the firm’s history. As a firm partner, Anthony manages staff recruitment and trains/mentors junior agents, which helps him better serve his existing client base. On the business side, he advises and consults with property owners and investors in diverse industries including manufacturing, distribution, wholesale, textiles, and more. He helps to guide clients on various issues, including situations when there may be a proposed change of use for land or property. He works closely with his clients to ensure the best possible outcome for the client, the industry and the community.

Anthony graduated from San Diego State University with a degree in speech communication, which he applies to his work every day. He explains, “Communication is a vital part of what I do. Understanding real estate is only one part of my business; being a good listener and truly understanding my clients’ needs, problems and objectives is equally as critical.” He adds, “managing diverse people, personalities, and emotions is part of every transaction whether I’m working with individuals, families or businesses.”

In addition to his successful career at Major Properties, Anthony hosts an L.A.-based podcast called, *Behar on the Block*. It features interviews and segments about real estate and the L.A. community. Anthony’s motto in life is to “Express gratitude every day, appreciate more and complain less.” This, he adds, has made him a better, stronger and happier person both personally and professionally.



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Stay up to date on commercial real estate in Los Angeles by following Anthony on Instagram @Anthonysbehar and Facebook @Asbehar, as well as connecting with him on LinkedIn.



Photographs by Charlotte Acevedo



## Susan Fixsen, Founder/Affiliate Broker, Pacific Oak Real Estate Services

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After spending 23 years working as a teacher, principal, and administrator in the California public school system, Susan Fixsen changed her focus and her career to real estate. Her life changing decision paid off and today, Susan is a leading broker and the owner of Pacific Oak Real Estate Services, a highly successful real estate business.

After leaving the education system in 2007, Susan began selling real estate full time. She received her real estate credential in 2006 and originally hung her real estate license with a retired broker. As a single mom of three children, she quickly realized, "I had no choice but to make something happen."

Susan's advanced education and years of experience working in the school systems laid a solid foundation and created a strong work ethic, which helped her to succeed in her new endeavor. Her focus and hard work paid off and within the first year of her new career, Susan made the equivalent of both her teaching and principal salary combined. She had a strong drive to excel and adds, "I always knew that I could be even better than what I accomplished each year." Constantly planning for the future, Susan decided to open her own business and in 2008, she founded Pacific Oak Real Estate Services. Susan adds that she always believed that she could make it happen and relied heavily on the philosophy, "If you build it, they will come."

Today, Pacific Oak Real Estate Services is a full-service real estate company with two locations in Morgan Hill and Hollister, California. As the CEO and owner, Susan manages a team of 10 talented agents and adds that teamwork is the fabric and the true culture in their office. She adds, "Teamwork, ethics and professionalism are what drive our company." The business has expanded from

a small town market to a much larger one and revenue continues to increase every year. The business has grown over 300% in assets since 2015 and has achieved one of the fastest growing brokerage per agents in sales bringing in over \$1.275 in GCI (gross commission income) last year.

Susan is highly competitive and extremely focused – strong traits that she applies to both her professional and personal life; whether she is assisting her clients or playing competitive golf. She is an excellent negotiator, leader and communicator, all which add to her achievements as a business owner and top real estate broker.

Golf has played an integral part in Susan's career throughout her life and it has become an expression of giving back to the community as one of Susan's and the Pacific Oak Real Estate services main fundraising donations. From Santa Clara to Monterey, CA, Susan has donated through golf and various events to the Santa Clara County Realtor's Education Foundation, San Benito County Association of Realtors events, Relay for Life, Breast Cancer research, and to the Kelly Freitas Memorial Foundation benefiting scholars in education. This ties in strongly with Susan's past career in education and continued contribution to the community.

In addition to her professional accomplishments, for which she has received numerous awards, Susan is very involved in charitable and community organizations. She belongs to multiple Chambers of Commerce and Downtown Associations, and spent four years on the local San Benito County Association of Realtor's Board. She is also chairperson of the non-profit, Growing Hearts Garden Center, which focuses on the development of community job opportunities and educational growth of adults with developmental and special needs.

## THE CORONATO PROPERTY GROUP

# CHRIS CORONATO

Owner / Real Estate Sales Associate



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Whether he is speeding down the racetrack or working from his office, Chris Coronato epitomizes the modern breed of tech-savvy, customer-driven real estate professionals.

With only five years in the industry, he has earned the title of *Top Agent* and has donned the cover of *Featured Agent Magazine*. as owner of Coronato Property Group in Westwood, New Jersey, Chris says that his key mission is to utilize careful marketing research and industry expertise to assist his clients in making one of the most important decisions in their lives: buying or selling a home.

In fact, the entire foundation of Coronato Property Group was built upon marketing for clients and branding for agents. As a privately-owned boutique agency, the real estate group takes great pride in doing everything they can to better serve their clients. Chris explains, "We believe in putting the clients first and the agency second." Everyone at CPG has cultivated lasting relationships throughout the years. Whether it is through providing advanced technology, offering continued support, or completing the entire process alongside them, every agent wants to ensure his or her client the best experience possible.

Although the market is ever-changing, team members strive to ensure home buyers that they should not be intimidated. Chris affirms, "The team we have built inside the Coronato Property Group and outside with our partners program are truly the best in the industry; like Chris Keelin with Family First Funding." Every member of the group works to stay up-to-date with what is going on in the marketplace and in certain pockets. For example, they look to see if people are taking advantage of the latest rates and how the market is changing in specific areas. To Chris, staying up-to-date means "leveraging everything they possibly find whether it be a new app, new SM endeavor, or latest CRMS. It also means understanding the best form of communication between clients and agents as well as how to capitalize on that."

In addition to providing exceptional service for his clients, Chris is a firm believer in empowering his agents. On October 2, 2019, the company celebrated its first anniversary with six agents onboard. At CPG, each agent specifically outlines a target market and demographic, so there is no crossover. However, if clients request to see a different area, they may do so. Chris also notes that he does not market on top of the company's agents.

Instead, he offers his complete support and encourages them to work as individuals and to take pride in their marketing platforms.

Another unique way agents are supported at CPG is through community involvement. Instead of taking it upon himself to decide which charities and events to sponsor, Chris relies upon his agents to choose a worthy cause within their area of expertise. Then, the company silently donates supplies or contributes financially. For example, one of the agents lost her brother to Type I Diabetes, so the agent chose to help raise money for the DZ Foundation, which was established in her brother's memory. On behalf of the agent, Coronato Property Group gave a monetary donation to the foundation and purchased a table for one of its events. Chris explains, "Community involvement is important for our agents because they're inviting people to certain areas, so they have an obligation to interact and to improve those areas to the best of their abilities."

When asked about his employment experience before becoming a real estate sales associate, Chris shared that he enjoyed a successful 16-year career in the fitness world, which, he says, has a strong tie-in with his current position. He explains, "Fitness employs a similar focus as real estate. It requires building strong relationships and supporting people in achieving their unique personal objectives. These are 100 percent parallel to the goals of investment and home ownership." Chris added that whether he is coaching a client in fitness or working with a client in real estate, his approach is simple and remains the same: "Chris Coronato works to exceed your expectations!"

Not only does he utilize his fitness experience in his current position, but he also combines his passion for racing with the real estate industry. Chris loves racing just as much as he loves real estate, so he established The Racing Realtor Division within the Coronato Property Group. His *YouTube* channel, *Racing Realtor 201*, gives subscribers an inside look at the world of track racing while also explaining how Chris has turned CPG into an impressive brand that delivers on its promises of excellence. His videos feature advice for realtors and for other professionals on how to buy, sell, invest in real estate, and market their own brands. Of course, he also shares his Corvette upgrades and tune-ups. Above all else, Chris shows his viewers how to be passionate about what they do and how to make real estate exciting and fun.



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## ADAM SCHLOSSER

SENIOR VP OF INVESTMENTS

# Marcus & Millichap

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Adam Schlosser has spent over thirteen years in the commercial real estate industry working in various sales and management level positions with Marcus & Millichap. Adam is a focused leader and skilled negotiator as a result of his diverse business experience, education, and the time that he served in the military.

Adam currently serves as the senior vice president of investments and the senior director of the firm's National Self Storage Group, a specialized brokerage and advisory division of Marcus & Millichap. Marcus & Millichap is a leading, national commercial real estate investment firm that specializes in real estate investment sales, financing, research, and advisory services. They offer customized and personalized services that meet the diverse needs of private investors, professionals, and institutions.

After working his way up from an intern position to regional manager at Marcus & Millichap, Adam seized an opportunity in 2013 to collaborate with an industry legend to grow and continue to trailblaze within the self storage brokerage niche. Twelve years later, it has grown into a highly successful, national business negotiating real estate deals from \$5 million to over \$200 million. Today, The LeClaire Group of Marcus & Millichap is known as a national self storage brokerage force that has closed nearly \$4 billion in transactions across the United States.

As a senior vice president, Adam leads a team of highly qualified

professionals focused on servicing the needs of self storage owners and buyers across the country and prioritizes maintaining best-in-class operations and providing comprehensive broker training. Adam explains, "We put all of our capital into one thing, bringing self storage buyers and sellers together through a specialized platform unmatched in the industry."

The business has also grown by utilizing the most innovative forms of technology to support their transactions and services. However, Adam adds that they are still very hands-on and offer highly personalized service. "Many say we're in the real estate business, I'd say we're in the people business. We build genuine relationships with our clients."

Adam graduated from Ohio State University with a Bachelor of Science degree in financial resource management and served in the Army National Guard's 1-137th Aviation Blackhawk Battalion. While serving an 18-month deployment overseas, he earned multiple awards and decorations for leadership and outstanding service to country. Adam is proud to say that he learned invaluable skills from his time and experiences in the military.

In addition to his professional accomplishments, Adam has received numerous *National Achievement Awards* and *Sales Recognition Awards* for his hard work and achievements with Marcus & Millichap.

# Patricia Ruiz

Investment Real Estate Consultant & C.E.O

Patricia Ruiz always knew that she wanted to work in sales and ultimately real estate. As an investment and real estate consultant with New Western Acquisitions, she has established herself as a seasoned professional in the industry.

New Western Acquisitions is a successful wholesale real estate investment firm based in Irving, Texas. While the company's roots are based in Irving, Texas, the business serves clients around the country and also has offices located throughout the U.S. including Austin, Houston, Kansas, Atlanta, Philadelphia, California, Colorado and Florida.

The experienced team at New Western Acquisitions focuses solely on investors who want to invest in homes that can be refurbished and resold. Patricia enjoys helping her investors and dedicates a lot of time following up and making sure the rehab is running smoothly. Their location alone sells between 60 and 90 properties a month in DFW.

In her role with New Western Acquisitions, Patricia finds the best properties available to meet her clients' needs and also works with lenders to help her investors secure funding for these properties. She has been extremely prosperous in her real estate ventures, selling a total of eight properties just this past month, and receiving top sales. She likes the fast pace of wholesale real estate and adds that there is a lot of competition. In some cases, houses can sell in as little as 30 minutes and the entire closing process may be completed in under two weeks, a much shorter time period than a traditional real estate sale.



We offer distressed homes that our investors can flip, then sell or rent. New Western provides a constant flow of off-market investment properties throughout the month. Our inventory consists of both single family and multi-family homes. We set our investors up for success by providing them with all the resources they need along the way.

A graduate of the University of Texas at Arlington, Patricia holds a Bachelor of Business Administration degree in business management and marketing. While in college, she took a professional sales class and was flown to Florida to participate in a global collegiate sales competition at FIU. It is there that she found her interest and niche for the world of sales.

After graduating from college, Patricia worked as a customer retention manager and then changed her focus to real estate and got her real estate license. In addition to her successful career with New Western Acquisitions, Patricia is also the CEO of sales and marketing for GXCS, a janitorial services company that caters to commercial businesses. Patricia's long and successful career has just begun and it's off to a great start.



Patricia Ruiz  
Investment Real estate  
Consultant at New Western  
Acquisitions & C.E.O of Sales  
and Marketing for GXCS

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# JAMEY MILHEISER

Senior Vice President/National Sales

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**IT IS ALWAYS ABOUT FOSTERING  
SOLUTIONS, WINNING TRUST, AND HELPING  
CONSUMERS GET AND STAY AHEAD.**

Always Respond.  
Listen. Counsel. Serve.  
Make It A "10" For All.  
Every Day Is "Game Day."  
Underpromise. Overdeliver.  
If It's Not Right Long Term, Don't Do It.

Have Fun!  
Be Consistent.  
Be Bold: Loud & Proud.  
Focus, Stay Humble, Stay Balanced.  
Keep Faith & Family First.  
Always Do More Than You're Paid To Do.

### **What is your role within Paramount Bank?**

As the SVP of national sales development & production, I oversee Paramount Bank's home loan sales team nationally. Essentially, I'm identifying growth opportunities for the bank and loan officers through SLAs, building coalitions with operations, and the back office; most notably in marketing, recruiting, operations, and capital markets. The most important role I fulfill, and this is the part I would do for FREE, is that I help our sales force obtain their individual goals for volume, growth, and success. I am a coach at heart and am addicted to the feeling of getting our sales teams fired up, prepped for success, and executing at levels they previously might have thought to be unimaginable. It's this simple, the loan officer at Paramount is my #1 client. If I give my loan officers a "10" every day, then they will give our home loan clients a "10" as well.

### **Can you elaborate on your history in the mortgage industry?**

I started in this business as an MLO (Mortgage Loan Officer) nineteen years ago, on my 22nd birthday. I learned a lot in my first role as a leader in this space eighteen years ago. Throughout all the chapters of my career, in different roles and at different organizations, I have continued to "self-scout," take on objection, face adversity, and continually find ways to improve myself as a person and leader, to create the best outcome and environment for all I am in contact with. This being said, I have always been, and remain to be, an MLO at heart. I still personally produce to this day; and that attitude and swagger about sales and service is what I am passionate about fostering at Paramount Bank.

### **What is the history of Paramount Bank compared to what it is today?**

The founders came together as an independent mortgage company back in 1970. Today, Paramount Bank has refocused its mission, as it has been recently rebuilt by a group of St. Louis investors. Paramount Bank is committed to delivering market-leading deposit rates, product depth, best-in-class technology, and superior service to help clients meet their financial goals. We are a veteran-owned bank and our focus on serving our military clients runs hand-in-hand with our corporate vision and mission.

### **What sets Paramount Bank apart from other banks in the industry?**

It is completely different from a corporate level as well as a cultural and visionary level. Ownership is 200% dedicated to reinvesting in the platform, and building a firm for 2020 and beyond via culture – technology – and service.

### **What is changing in the sales and production sector at Paramount Bank?**

With nearly two decades of experience, I have been involved in every aspect of the home loan space, including underwriting, operations, compliance, and more. As I work within this opportunity at Paramount Bank, our vision is to foster a new approach to become the next national leader in originations. This is by being steadfast in building world-class systems and culture for both retail and direct-to-consumer MLOs. We are building an ecosystem where loan officers thrive on relationships and enhance their brand through service and customer success. Our goal is to be the best in the nation and we are on our way. We overdeliver to our loan officers every day and they overdeliver to our clients every day. In the end, it's the people we have here. This special group of professionals with an aligned vision, creating a world-class and cutting-edge environment for our loan officers on distributive retail and consumer direct fronts.

### **Why are you so passionate about building this new platform?**

As I mentioned, I am a loan officer at heart and I know what motivates me. It is always about fostering solutions, winning trust, service, and helping consumers get and stay ahead. When a loan officer asks a borrower for their trust, they should never be placed in a situation where they would have to ask for it again. With that, they need to be able to make promises and commit to operating on a deadline within a process that usually has an audience. We want our sales force to be bold and operate with confidence that the operations team has their backs and we will do whatever it takes to have an ecstatic client and a "hero" loan officer. It is imperative to build a platform where loan officers are spending 90% of their time doing what they are good at and love to do, which is structuring the right solution for each borrower's unique situation. At the end of the day, we are creating a platform where internal and external customers win.

### **What things are vital to the success of your office and your team?**

I am a coach at heart and my passion for serving clients is supported by my beliefs of enhancing income, lifestyle, and mentality of our sales and production team. It is also about teamwork. The loan officer is only as good as their last loan and the support of the back office. Teamwork is vital and an essential part of our climate. Our team members adhere to a list of core values that focus on things like concise execution, listening, responding, consistency, balance, and humility.

# OLIVER SEIDLER



“ We basically pioneered virtual wholesaling- as the first company in this industry to do everything remotely. ”



Oliver Seidler, CEO

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As the CEO of a successful real estate investment firm, Oliver Seidler has created a unique business model that adeptly supports both his employees and his clients. PropertyForce is a rapidly growing real estate investment firm that uses the latest marketing, sales and technology strategies to assist investors in finding undervalued residential investment properties.

Oliver oversees business operations at PropertyForce, focusing on strategic direction, department integration and functionality, marketing, sales, problem solving and developing key relationships. He manages a sales team of 30 key employees who utilize the latest technology and marketing channels to source properties for investors. They focus mostly on distressed properties for resale or renting; some of the staff concentrates on selling and others focus on acquiring properties.

Founded in 2006, PropertyForce started out as a local real estate firm in South Florida and then expanded to four locations in major cities throughout the state. As the business continued to grow and prosper, Oliver realized that the true vision of the company could not be achieved with several physical locations scattered throughout various markets. In 2016, Oliver bought out his partner and became the sole

owner of the company and re-envisioned the business model by leveraging technology to allow expansion throughout the country from one singular location. The four offices were consolidated into one main location where all work could be performed remotely.

Today, under Oliver's direction, PropertyForce continues to thrive by utilizing technology and streamlining operations to become a more successful and efficient business. Oliver adds that their customized CRM and sales software has become the centerpiece of their business and has allowed his sales and operations team to work so much more efficiently and exceed their goals.

Oliver received a Bachelor's Degree in International Business from Florida State University and recently received a Master's Degree from The Birthing of Giants program at MIT. He is a member of the Young Presidents Organization, is involved with the Genius Network Program and has been a member of the Entrepreneurs Organization (EO) since 2009.

In addition to his professional and business accomplishments, Oliver mentors young professionals and volunteers his time with the Boys and Girls Clubs of America.

# MICHAEL SMITH, SFR

## AWARD WINNING SALES ASSOCIATE

### Weichert Realtors

With over 25 years of real estate sales and finance experience, Michael Smith is uniquely qualified to provide the highest level of competence and expertise for his clients. He explains, "I am committed to tirelessly providing truly personal service with a difference." As a highly successful Realtor®, Michael is a top agent and has received numerous prestigious awards. However, his journey into real estate is what has given him a unique edge over other agents.

Michael began his career in banking. There he learned the finance end of the real estate industry gaining in-depth experience working for a bank for many years as a vice president overseeing the mortgage operations. After the bank was sold, he was recruited for a sales position as a Realtor® and he likes to say, "In some respects, the real estate business found me." He obtained his real estate license and took the job as an "interim" position. That "temporary role" has developed into a successful and highly lucrative career as a top real estate agent.

Today, Michael has brought his expertise to Weichert Realtors, where his areas of proficiencies include listings, technology integration, social media sales and marketing, global relocation, and mortgage lending. Michael loves the flexibility of the job but, more importantly, he has a particular fondness for getting to know his vast and diverse circle of clients. He adds, "Every client I've had the pleasure of representing has their own unique story and I'm truly excited to meet and learn about all of them."

As a certified relocation agent, Michael services all of New Jersey as well as relocation to other states and countries around the world. He works tirelessly to offer the highest level of quality and attention to detail throughout the entire process. "There is nothing that my clients have to do. I take care of everything", he explains.

In addition to successfully guiding and serving his clients, Michael uses his own real estate sales and finance knowledge to mentor other agents to become top agents. Beyond his professional accomplishments, Michael is extremely proud of the awards he has received and strives to continue to provide the level of service that his merited awards indicate.



#### MICHAEL'S HONORS INCLUDE:

- Selected as the *Asbury Park Press Readers' Choice Award Winner for Best of the Best Real Estate Agent in Monmouth County.*
- Named as one of the *Top Elite Real Estate Agents* for Monmouth County by *Monmouth Health and Life Magazine*
- Featured on the list of *Top Ten Real Estate Agents* for the State of New Jersey by the American Institute of Real Estate Agents
- Consistent recipient of the *NJ Association of Realtors Circle of Excellence Award*
- Rated a *5-Star Zillow Real Estate Agent*



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# BRADLEY WAYMAN

Head of US Mortgage Sales, Citibank, N.A.

## What is your current role and history with Citi?

I have been with Citi for more than 16 years. In 2014, I transferred from California to the East Coast to lead our retail mortgage business for the East. In February 2018, I was named head of US mortgage sales and, most recently, was made responsible for all secured lending originations channels, including home equity.

Today, I lead all mortgage sales channels of Citi's U.S. consumer business. I manage distributed retail sales, that is, the loan officers based in our Citibank branches and markets, as well as direct to consumer sales, whose call-center-based loan officers serve all 50 states nationally. I am also responsible for our strategic markets group, which focuses on providing financial inclusion in underserved markets, and I am the fair lending champion for Citi. In addition, I manage correspondent sales, the channel that buys loans from other banks and lenders.

As a leading global bank, Citi's mission is simple: we responsibly provide financial services that enable growth and economic progress. Through my partnership with my colleagues leading our branch network, small business banking, wealth management, and international personal bank, our approach is to "lead with lending and end with investments."

In other words, by getting to know our clients holistic financial needs we can offer the appropriate financial solutions for our customers to borrow, pay, save, invest and protect. We are initiating a relationship that deepens as we work with our banking partners to meet all of our clients' financial goals.

## How is this business different from others in the same industry?

We are committed to providing all clients remarkable service from a *One Citi* approach. Our customer base is diverse – ranging from first-time homebuyers in low-to-moderate income areas to the most affluent of global clients. Citi is a large international financial institution made up of many different lines of business. However, from the clients' perspective, we must be a single, seamless organization serving the needs of all our clients and communities.

In this client-centric model, our home lending officers join forces with our branch staff members, ranging from tellers to personal bankers, relationship managers, small business bankers and financial advisors, to ensure Citi provides the right products and services for all their financial needs. We are able to do this successfully because we work begin with a foundation of building relationships, which builds trust. We take

the time to make sure our mortgage clients know exactly what to expect in a process that can otherwise be confusing and intimidating. As we get to know them through the mortgage process, we uncover other financial needs. That gives us the chance to introduce our mortgage clients to the right colleague to help them build their savings, invest for retirement, or meet whatever financial goals they have. All our business lines come together to understand and serve the individual client, and multiple relationships are formed.

By acquiring and deepening relationships, we create clients for life and future generations. Our programs are designed to reward clients for the depth of their relationship with Citi, such as our relationship pricing mortgage incentives. We also have programs tailored to serve financial inclusion to enable home ownership, like low down payment lending options for first-time homebuyers, or down payment assistance.

We know the importance of feedback from our clients and our staff, and we focus on the client experience through customer surveys as well as our voice of the employee survey to constantly improve our service and create an inclusive working environment leveraging our diverse talent across the franchise. In addition, Citi was recently recognized by Kiplinger's as, *The Best Bank for High-Net-Worth Families* for the third year in a row. <https://www.citigroup.com/citi/news/2019/190702a.htm>

## What separates your business from your competitors?

We are a client-centric organization with a global presence that is strategically investing in digital capabilities and innovation to serve our clients and communities. We are making it easier for clients to care for their financial needs, big or small, in more than 100 countries around the world. Our employees, like our clients, are diverse and the professional and personal experiences provide a unique capability to serve the clients and communities in a holistic manner. At Citi we collaborate to solve our clients' needs, with a focus on relational not transactional banking which is built on being trusted advisors.

## What is your educational and career background?

I earned a Bachelor of Science degree in business and economics from the University of California in Santa Barbara. While finishing my degree in just over 3 years, I also worked in real estate and financial services prior to graduation. I had an opportunity in Washington, D.C. to work in the Office of Public Affairs at the Department of Justice, and then at the White House Office of Political Affairs, planning presidential and executive affairs and travel within the western 12 states. After that, I re-entered the finance and lending industry and moved back to

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**Bradley Wayman**  
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Southern California in hopes of returning to graduate school. I started working again in finance, moved into a role with Citi, and have been with the company in various leadership roles for the past sixteen years. I recently completed my Executive MBA at the Yale School of Management and was recognized in *Poets & Quants 100 Best & Brightest Executive MBAs*. <https://poetsandquantsforexecs.com/2019/07/01/100-best-brightest-executive-mbas-class-of-2019/>

**Are you involved with any organizations?**

Yes. When I was at Yale, I cofounded a program called, *Panel of Peers* (POP). This platform was created to bring people together as peers to collaborate on challenges and topics that leaders face. The goal of POP sessions is to create a unique environment for the collision of ideas, expertise and insights and to provide a springboard to finding solutions for real-world

problems in business and society. The *POP Program* is now embedded as part of the *Yale Executive MBA Program* and it has been launched internationally at 15 prestigious universities around the world.

I recently joined the board for a non-profit organization that serves children in the foster care system called Royal Family Kids. RFK serves children in the foster care system in 43 states and 11 countries, and aims to confront abuse, change lives and transform communities.

**Besides your professional accomplishments, what else are you most proud of?**

I would have to say my family. I have been married to my beautiful wife for 12 years, and we have three great kids in grade school and an English bulldog.



# STAN STEELE

Principal, Axiom Note Trade LLC

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With over 25 years of combined experience in the mortgage industry, residential and commercial real estate, and note investing, Stan Steele brings a wealth of knowledge to his current role as founder and CEO of Axiom Note Trade, LLC.

Axiom Note Trade is a professional note buying business that specializes in the purchase of seller-financed mortgage notes and trust deeds. Established in 2005, the company focuses on helping interested buyers, who may have been turned down for financing by a bank. As a principal buyer, Axiom Note Trade makes all decisions in-house so there is no broker chain. As a leader in the industry, it is a well-funded business with a pricing model that is strategically structured so that they can provide the best service to their customers including quick closings, customized options for unique situations, and flexible note buying programs.

The team at Axiom Note Trade services customers across the country and offers strict confidentiality with all transactions and they have established the highest credibility in the industry. Stan explains, "We primarily focus on helping people, it is what we do

and care about. We educate investors so that they can manage risk more effectively and achieve higher return on investment. We also help to reposition people and their finances so they can become bankable."

As CEO, Stan is responsible for the overall vision of the company and oversees the marketing efforts, as well as the acquisitions department of the business. He also manages their sister company, Axiom Direct Mail and Digital Marketing, a full-service direct mail and digital marketing business that assists clients with increasing brand visibility and creates strategic marketing strategies to increase acquisitions and expand their online presence. Axiom Direct Mail and Digital Marketing provides: Direct mail, mobile digital billboards, wide-area Bluetooth proximity marketing, and targeted sales leads with valuable customer avatar reports.

Prior to his roles with Axiom, Stan spent 15 years working as a loan originator in the mortgage industry and owner of a mortgage company. He is a certified mortgage planning specialist (CMPS) and has devoted the past 25 years to real estate investments.

Stan also shares his knowledge and uses his experience to guide and educate others in the industry through his various meetup groups. He currently teaches a national real estate course approved by the National Association of Realtors (NAR) and he also offers courses for financial planners that are approved by the Certified Financial Planner (CFP) Board of Standards. These courses focus on strategies to help professionals protect and better position their clients for real estate and financial related issues.

Stan is also the host of *House Money Nation*, a podcast for note investors nationwide. He is the author of two books and his latest book, *Big Money Secret*, was just released on October 1st, 2019. The book focuses on the fundamentals of real estate investing by utilizing seller financing.

Stan's dedication to hard work and perseverance is just as important in his personal life, as he holds a black belt in Jiu Jitsu martial arts.



BUY  
THE  
BOOK

STAN STEELE

BIG MONEY  
SECRETS

HOW TO BUILD REAL WEALTH  
INVESTING IN SELLER-FINANCED NOTES

AVAILABLE ON AMAZON

# AL ALEX LOYD

Realtor and Founding Member

## THE LOYD GROUP

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Although it is now the country's largest independent real estate brokerage, one of Compass's mottos is: "collaborate without ego." Robert Reffkin, CEO and co-founder, whom Alex Loyd names as one of the most inspiring people, truly believes in this motto and it shows with the agents he has hired.

In late 2018, Alex was hand-selected among a handful of top producing agents to be a founding member of Compass, a new, cutting-edge real estate company that has become one of the leading luxury boutique brokerages in the country. She knew she had joined the perfect company when Robert took the time to leave her a personal voicemail after she was hired, despite the fact that there were already a few thousand agents working for him.

To Alex, the most important part of her job is to create and maintain relationships she forms with clients and co-workers. Alex explains, "I came from one of the top boutique brokerages in Houston, which had a family feel to it, but with Compass, I now have a very large extended family throughout the country. I can pick up the phone at any time and call an agent in Santa Barbara or Miami and they are there to help me in any way that they can. It doesn't feel like that 'dog-eat-dog' culture and that comes not only from the top, but from our strategic growth managers, who recruit and hire Compass agents. From the agents to the staff members, it is a true family culture and everyone has a wonderful sense of teamwork and support." For these reasons, Alex says that she feels extremely fortunate to be an agent for Compass.

In 2008, before she became a full-time agent, Alex worked as an agent assistant. This position allowed her to work with a variety of agents, which taught her about contract deadlines, paying attention to detail, and working with many different personalities. Alex says that her previous employer had an excellent training program and she credits her current success to the experience she gained during her time as both an assistant and an agent. Alex went on to become a full-time agent in 2009 and has since been a top-producing agent year after year. She provides efficiency and a high-level of service in order to create a bond with both sellers and buyers.

Due to her experience and the support she receives at Compass, Alex says that she has the best people and resources in play. For example, she takes advantage of the unique programs available such as *Compass Coming Soon*, which allows her to list homes on the Compass website without the days accumulating on the open market. This gives her time to test the market and to prepare



the listing through a wonderfully successful program, *Compass Concierge*. The *Compass Concierge* program assists clients in preparing their homes for the market by allowing Compass to completely fund the cosmetic improvements that will increase the value of their home; staging, cleaning, painting, flooring, landscaping, and much more. At the time of the property's closing, *Compass Concierge* will simply invoice the client for the total services rendered. No upfront costs, no interest, no hidden fees.

Along with Alex, Compass has also grown substantially since its founding in 2012. As the largest independent brokerage in the nation, Compass employs thousands of agents nationwide. Alex has watched her own office expand, starting with only nine, the Houston office now has over 170 agents. Nevertheless, personal relationships among the agents are still maintained. Alex is also part of a private referral team called *Coast-to-Coast*, which is an elite network of top realtors and brokers across the nation. *Coast-to-Coast* was started by a Dallas Compass agent, who hand-selected one agent from each Compass office around the country to become a part of this very successful team. These agents maintain positive relationships and trust around each other and their clients, as well as an edge over competitors.

In addition to being a *Top Producing Agent* since 2010, Alex also won the *2010 Rookie of the Year Award* and is a *Compass Cares Agent Champion*. Through the *Compass Cares* program, Compass makes a contribution to the community with every sale or rental that closes. Alex uses that money deposited into her *Compass Cares* account and donates to a charity of her clients' choice. Outside of her professional life, she devotes a great deal of time to her daughters' school, Valley Oaks Elementary, where she has served on the auction committee for 4 years, serving as the chairwoman for 2 of those years. She also volunteers for charities such as the *Barbara Bush Literacy Program*, the Ronald McDonald House, and Habitat for Humanity. She was also named the *Top Fundraiser* for The Alzheimer's Association - Houston Chapter. Alex loves to play tennis, travel, read and spend time with her family, especially her two beautiful daughters, Emerson and Abby.



## Rich DeNicola

Chief Operating Officer  
Realogy Expansion Brands

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### **As an expert in many facets of the real estate industry, what is your current role?**

I am the chief operating officer (COO) for Realogy's recently created expansion brands portfolio, which includes Better Homes and Gardens® Real Estate and ERA Real Estate. In this role, I oversee all operational aspects of the franchises and financial management including training, new franchisee onboarding, systems, tools and technology, recruiting and retention, and networking engagement for nearly 48,000 agents and more than 2,650 offices in 42 countries.

### **Can you elaborate on the history and franchise aspect of Better Homes and Gardens Real Estate and ERA Real Estate?**

Better Homes and Gardens Real Estate (BHGRE®) launched in 2008 during the housing crisis, which admittedly was an

interesting time to launch a real estate brand. Until then, there had not yet been a real estate brand created intentionally for the needs of consumers and their lifestyles. Better Homes and Gardens Real Estate conveys the future of the real estate industry while remaining grounded in the tradition of home.

The franchise model offers a unique value proposition for agents and franchisees, such as flexible business models, a values-driven culture and opportunities for accelerated growth. This model along with our partnership with Meredith Corporation, the parent company of the Better Homes & Gardens brand, helps real estate agents become more productive and build stronger consumer loyalty by relying on the trusted Better Homes & Gardens name and our brand's focus on the lifestyle benefits of home ownership.

ERA®, on the other hand, was founded nearly 50 years



## REALOGY® EXPANSION BRANDS

ago by Jim Jackson and Gene Francis, business partners who revolutionized the real estate transaction process by equipping every office with what was then a ground-breaking technology – the fax machine. Not only did they set a new pace for the industry unintentionally, they also created a new way to collaborate. Fast forward to today, ERA Real Estate continues to be innovative with a focus on technology, and prides itself on having one of the most supportive, engaged, and collaborative cultures in the real estate industry.

### **What growth have you seen since you joined the business?**

In September, I took on the role of overseeing ERA operations and working with the ERA team. They've got tremendous momentum this year, with five new affiliations – all conversions – in the past few months as well as strong M&A growth, expanding their network by 415 affiliated sales professionals, nine offices and \$650M in sales. This expansion, along with new product offerings like their partnership with Home Advisor and ERA® Moves, make this an exciting time to be with the brand.

Better Homes and Gardens Real Estate had 40 US-based franchises when I joined the brand in 2013. Over the course of the four years I led the franchise sales team, we grew the network to about 100 franchises and expanded internationally. The brand, now in its eleventh year, has grown to encompass a network of 120 affiliated brokerages with 13,000 sales professionals globally.

### **What separates your business from others in the industry?**

ERA's founding principle is that each independent sales professional and broker is unique, and we empower them to build their businesses the way they want. The brand provides flexibility and choice, empowering our affiliated brokers to build commission structures that allow them to compete for agents in their markets. They can build their business the way they see fit, whether it's through flexible branding options or expanding to allow additional revenue opportunities.

The relationship that BHGRE has with Better Homes & Gardens magazine and its publisher Meredith Corporation allows us to leverage the magazine's 90-plus percent brand awareness and editorial content that is relevant to consumers at all phases of their lives, but especially when they are purchasing a home. Better Homes and Gardens Real Estate truly is THE lifestyle real estate brand.

### **What is the new Realogy Expansion brands company focusing on?**

Our mission is to accelerate the success of both brands and their network of affiliated brokers and agents. We have many resources including training, marketing and lead gen available for our network. My particular role is on the ops side with a specific emphasis on helping our broker/owners become more successful operators. This includes assistance in identifying opportunities for mergers and acquisitions along with a focus on recruiting and the organic growth and development of existing agents.

### **How do you contribute to the success of the agents?**

The company invests a lot of time, money and resources into our affiliated agents. On the BHGRE side, our training team and award-winning Be Better® University platform offers hundreds of sessions a year, both live and virtual. We also have LOTS of marketing resources available for agents to market their businesses and listings.

One of the most unique resources utilized by BHGRE affiliates is PinPoint, a tool created for agents to reach appropriate buyers for specific properties leveraging Better Homes & Gardens magazine and Meredith Corporation's consumer behavior data which is harvested from 175 million consumers.

On the ERA side, we are equally vested in the success of our affiliated agents. In addition to a wealth of virtual and in-person training programs, the brand also offers many opportunities for peer-to-peer learning and collaboration through our live events held throughout the year.

We also provide a broad range of tools to drive their business, with a focus on strengthening and extending their relationship with clients through the entire homebuying process and beyond. Tools like TextERA and the ERA Moves program offer affiliated agents the opportunity to connect with their clients at every stage of the homeownership lifecycle.

In addition to our brand-specific programs, the Realogy Expansion brands also benefit greatly from the power of Realogy, especially when it comes to rolling out technological innovations like Agent X, our most recent digital assistant skill on the Amazon platform, and TurnKey, a beginning-to-end homebuying program made possible through a collaboration between Realogy and Amazon.

# Helping This Generation Create Wealth Through Rental Property Investments

By **TOBY BROWN**



I give newcomers in the industry the **knowledge** and **opportunities** that I never had to help them build their own success, **brick by brick.**



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As the founder and CEO of The Brown Group, Oklahoma City's leading real estate and property management firm, I have spent 16 years in nearly every facet of the industry as a managing broker, realtor, developer, investor, and entrepreneur. My investments have totaled over 50 million dollars, but my true legacy has been transforming communities. I've seen firsthand how my real estate investments have revitalized neighborhoods, empowered communities, and given people a place to call home.

My success comes hard-earned. Growing up, I lived in a fractured community, where I saw few options for and examples of success. I started going down a bad path and when I hit rock bottom, I realized it was time I got serious about planning my future and seizing every opportunity that came my way. I put myself through school, ultimately earning an MBA. I went to work in corporate America but realized I wanted more than just a desk job. Real estate caught my eye, so I started on the traditional path by getting my *Real Estate License* and started selling homes. I knew instantly to reach my childhood dreams of success it wasn't going to be through selling homes. I had to get on the investment side of the business. I could see that was where there was real cash flow. When I moved from selling to investing, I gained what I was truly searching for control of my time. I bought my first investment home, which turned into five, then 10, then 30. My business was up and running. I found my passion in the real estate industry. I knew I could

make a difference in the same kinds of communities I grew up in while building a successful business.

Now, I'm focused on paying it forward as a real estate mentor and coach. From investing in your first rental property, to tenant management, to negotiating deals and setting up cash flow assets, I want to teach this generation about investing in rental properties to help them build wealth and support their families for generations to come. Whether they're looking to invest in their first property or want to dive into property management, I help you hone in on their skillsets, start building a career and ultimately, build a legacy.

In addition to coaching, I help teach people the business through my podcast, *The Real Estate Mentor Podcast*. I create videos and share tips on my Facebook page, *Toby Inc*, and on my *Toby Brown YouTube Channel*. I'm currently creating a course and coaching program on investing in single-family homes.

It's such an honor to be acknowledged as one of the top 100 in real estate, both for me and for the Oklahoma communities I serve.

# IZABELA KAUFMAN

**Izabela Kaufman** likes to think that entrepreneurship has always been her calling. Born in Poland, she grew up with very humble beginnings, but always aspired to do something important with her life. She pursued an advanced education, earning several degrees, worked for the United Nations, and eventually moved to the United States, gaining hands-on experience in project management, real estate, and finance. Today, she is a successful entrepreneur and devoted humanitarian.

Izabela graduated from Krakow University with a B.A. in international relations and also earned a B.A. in Middle Eastern studies and law from the University of London. She continued her education at Harvard School of Business, studying entrepreneurship, business analytics, economics, and financial accounting, and also received an advanced certificate in entrepreneurship from the Wharton School of Business.

During college, she worked as an apprentice at the United Nations Information Center in Warsaw and explains how the job had a profound impact on her life, “My most character-shaping experience was an internship position at the United Nations in Warsaw. That role steered me towards my current humanitarian and charitable affiliations.”

After moving to the United States and settling in Florida, Izabela worked as a project manager and a growth hacker, gaining the skills that she would later put to use to build her own company. She adds, “In terms of professional development, one of the most challenging roles I have taken on was building a boutique real estate company from the ground up. In that role I handled acquisition, investment, construction, and management for hundreds of multifamily units. That role laid the foundation and the vision for Hotlets.com.”

Izabela’s newest business venture is a company named Hotlets.com. Hotlets.com helps homeowners sell their property with a click of a button. Referred to as the “Amazon for Real Estate,” the business was created to redefine the home sales industry. It is designed to provide a simplified experience for selling and buying homes and homes can be bought and sold with a click of a button.

As the founder of the business, she explains, “My responsibilities primarily focus on leading a technical team and developing the product that allows for a more simplified property purchase and sale experience. This is a very hands-on role, which allows me to lead a lean and agile approach to the product development and implementation.”

Izabela also has a deep focus on community and charity efforts. She is grateful for the opportunities that she was given in the U.S. and is an active member of the Rotary Club, a Paul Harris Fellow, and also volunteers her time with Habitat for Humanity and other relief organizations.

**“For sellers, we aim to offer fair market value based on deep dive analytics. For buyers, we offer a simplified experience and a hassle-free transaction. Our priority is to pass savings onto the buyers and sellers.”**



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## ONE-ON-ONE WITH **SURFARAZ DINANI**



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**veloce**  
consulting

**You are CEO and founder of two companies, Veloce Consulting, Inc. and Park Rock Capital, which is unique. How did this happen?**

I started Veloce Consulting in 2008, a transition from an IT Distribution company I co-founded. Real estate was at its peak and I saw an opportunity to expand the boundaries of my business endeavors. However, by the time I entered the real estate world, it was the worst financial crisis of our generation. While these were difficult years for everyone in real estate, it appeared that the timing of my entry was perfect. Success in real estate requires real analytics and knowledge, being able to identify where value can be added and how it can be maximized. Veloce's ability to grow after the 2008 crash was a sign that our fundamentals worked, regardless of the economy around us.

During that time, with growth, we were able to secure private financing for many of our transactions. We capitalized on the amazing opportunities that were available because it had become a buyer's market and things were no longer over valued or inflated. We began acquiring a diverse portfolio of income producing assets throughout the tri-state region. These acquisitions ranged from quick fix and flips to long term investments with great cap rates. With this experience we learned which real estate deals worked, and how to analyze operators. That took the Company to the next level,

which involves lending to others who we thought were good investments as operators and had projects that met our system and standards. Now these two companies work together to serve real estate investors across the globe; Veloce Consulting, Inc. on the real estate investment and equity side and Park Rock Capital, LLC on the debt and lending side. My focus is bringing in new business, building relationships with different lenders and developers, as well as providing structure to sometimes extremely complicated real estate transactions.

**Tell me a little bit about Veloce Consulting.**

Veloce Consulting is a real estate investment firm as well as a boutique consulting practice that structures, finances, and executes creative solutions for investors and developers. Within our structure, we own income-producing properties throughout the country. We find real estate, looking for where we can add value using our knowledge and techniques. From there, we either sell or partner with different investors, funds, and developers.

In today's market, deals are difficult to find at the right price in the right marketplace. With our vast network of people in the real estate space and our strong buying arm, we are able to provide clients with off-market properties and potential development deals. Further, with current interest rates, cap rates are just getting tightened; we try to maximize returns by

providing added value to projects for our real estate clients and equity partners.

The consulting side of Veloce focuses on providing market information for real estate projects, property management, preservation, due diligence, investment analysis, project management, comprehensive evaluation reports, deal flow, and cash flow analysis, as well as credit facility selection and success management. In addition, Veloce often conducts joint ventures and partnerships with developers participating in equity.

**Park Rock Capital is an alternative lender. Can you tell me more about that?**

Park Rock Capital is a direct alternative lender for real estate investors based predominantly in New York and New Jersey. We primarily originate innovative and quick commercial bridge loans for investors with time-sensitive projects nationwide and provide working capital through specialty financing solutions. My focus is to maximize returns for our clients, to find and add value. Park Rock Capital is simply another vehicle to assist our clients.

**Can you give me a few examples of your real estate projects?**

We own and manage a few hundred properties within our portfolio. We also own and invest in self-storage facilities; in fact, there are two such self-storage facilities being developed in the mid-west as we speak. We are currently structuring equity transactions on three projects in New Jersey, between 50 units and 250 units. These are all within opportunity zones where investors can participate in equity portions of the projects. In addition to the equity, we have daily closings on both debt and acquisition sides of the business.

**What makes Veloce Consulting and Park Rock unique from other companies?**

We are very creative in real estate, with both companies working hand-in-hand to add substantial value for our clients. We have unique opportunities that present themselves through our expansive network of clients, developers, real estate agents, banks, and others. We work with people in the industry who make projects available to us that others may not have access to. We strive to ensure everyone we are dealing with from our staff, lenders, clients and partners are all well versed in real estate, and value proven knowledge and experience above all else. The main market in our portfolio is underserved markets. It is there we see high cap rates across the country. We try to stay on the East Coast, but we also do purchase and provide financing in most states where we see upside. We focus on bringing in equity partners on many transactions and are hands on. We will often rehab properties and stabilize the assets through our team of contractors and developers. This allows us to create the value the property has but was lost because of neglect or mismanagement before our acquisition, now with the value added we either sell or hold the properties.

The relationship between Veloce and Park Rock is symbiotic, although they are distinct and separate companies. Veloce is always looking for debt for its clients, Park Rock can provide that debt which allows Veloce to focus on equity and operations while still being able to deliver on client needs. Having both of these



companies in-house allows for creativity in structuring real estate opportunities and providing clients with a complete solution.

**Tell me a little bit about you, personally.**

I was born in Dar Es Salaam, Tanzania, though my family is originally from India. My father was a successful businessman in Tanzania and then later in the US. We migrated to London in 1983, and then we moved to New Jersey in 1988. I grew up in New Jersey and got married in 2007, I have two lovely daughters and a son.

I started my first business in 2001, while I was still in college, an IT distribution company, which was very successful. I have four older brothers who are all involved within the business holdings, some at the same time are professionally working within their own space. Hard work and determination to be successful has always been a part of who I am. The support from my mother, family and well wishers allows me to accomplish my goals. I surround myself socially with likeminded people and people in the business arena where I can share and learn ideas about business, new opportunities, and try to gain operational guidance. I spend at least 30 minutes a day thinking by myself, without interruption, and I try to read daily as well. This allows me to gain focus, clarity, and peace which in return allows me to make business decisions with a clear mind. Currently, I'm reading *Talking to Strangers*, written by Malcom Gladwell. I also try and read the *Holy Quran* every night.

**What is your motto in life?**

Ones best success comes after their greatest disappointments.



## ANDY PRICE

CEO, Price Mortgage, LLC

Andy Price is founder and CEO of Price Mortgage, LLC, one of the premier mortgage brokers in Arizona and the Southwest. Headquartered in Arizona, the company specializes in providing mortgage services with low rates to residential homebuyers across its home state as well California, Oregon, New Mexico, and Minnesota, with plans to expand into additional regions in the near future.

Andy's approach to his role as CEO is unique from most. Clients won't find him tucked away in his office, far from daily work functions and unapproachable to clients. Rather, he is a "working CEO," so to speak, actively overseeing sales and operations, supporting his 40+ loan officers and staff, and himself working closely with clients, originating loans. With his 15 years + experience Andy serves his clients and staff with valuable insight and expertise from both sides of the home-buying process. With my 2 year experience as a realtor I was fascinated by the numbers side of things and also frustrated by the service and knowledge by the mortgage companies that represented my clients. Approvals turned into denials and the lack of communication and service made me realize I could serve potential borrowers better and along with the realtors that represented them. I knew it was like to be

on that side of the transaction and knew what it meant to be a partner in lending my realtor partners deserved for them and their clients.

His uncommon perspective makes sense, considering Price Mortgage's unique service model and his motivation to leave a successful 15 year career in mortgage lending to launch the first successful hybrid mortgage company two and a half years ago. "The idea of a hybrid first emerged after time working for a mortgage broker and later a mortgage bank," Andy explains.

The idea for Price Mortgage took full form during Andy's tenure at other brokerage companies and banks, learning the business and gaining valuable skills and insight from his entry as an assistant, loan officer, and sales manager. "It occurred to me that I could put together a hybrid of the two; a brokerage company and a bank, to create a company that provides mortgage broker freedom and options with mortgage banker services and support, but with much lower rates and fees," Andy explains. "Just as importantly, I wanted a staff that was as dedicated as I was to providing personalized, top-notch customer service and support." With this in mind, in 2017, Price Mortgage was born.

The impetus that led to Price Mortgage shines in the company's business model, which has the interests of its clients at its core. "The needs and situations of each of our clients are unique. We work with a host of investors to find the best loan options available for them, with the lowest rates possible," says Andy.

Andy's dedication to his clients and his career is obvious in his myriad industry accolades, including a five-star professional rating and several awards for being in the top one percent of loan originators in the country, and his ranking as one of the top 10 Arizona broker loan officers. Although proud of his professional achievements, he takes his work personally. "Buying and owning a home should be a good experience. It's where we share our lives with our families, build memories—and I speak from experience," Andy says. "I have a beautiful wife, two kids, 13 and 11, and two crazy, little dogs. Home is a special place for us all and I enjoy being a part of that process to help others own their own home to build their lives and memories with their families and loved ones.



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# CORNELIUS L. JACKSON

CEO AND BROKER OF CLJ REALTY GROUP

As a highly successful realtor, broker, credit repair expert and former law enforcement officer, Cornelius Jackson uses his wealth of skills and experience to run his company, CLJ Realty Group. Cornelius considers himself a true “marketing broker” because he does not just list a property and forget about it – he expertly markets the listing to get the best sale possible.

Cornelius has worked in real estate for fourteen years and started his company, CLJ Realty Group in Orange County, California, just over four years ago. He created his business with the original intent to assist asset managers with selling REO properties (property that the lender has repossessed for non-payment of the mortgage loan) but he shifted his focus, explaining, “While going through the process, I saw a lot of people lose their homes, so I shifted gears and started helping people in pre-foreclosure by using my unique marketing techniques to help them sell.” So in addition to selling these properties, he helps people that may be losing their homes.

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**"I saw a lot of people lose their homes, so I shifted gears and started helping people in pre-foreclosure."**

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Cornelius also expanded his focus to assist people with bad credit and help them rebuild so they can become homeowners. A year ago, he partnered with a nonprofit organization and formed CLJ Financial, a financial literacy and credit restoration organization. There, he coaches and mentors people while helping them get ready to close on their first home. He adds that he truly cares about people and wants to see them do well, so he offers the guidance that they need to be financially successful and independent. As a retired law enforcement officer, Cornelius truly understands his clients' needs, especially from a security perspective. This experience translates into helping his clients make the right decisions and help themselves.

In addition to his professional accomplishments, Cornelius is a master instructor in Taekwondo and the vice president of his local chapter of National Association of Real Estate Brokers, which strives to promote black home ownership within the community. He is also especially proud of being the only African American speaker at the *California Association of Realtors (CAR) Broker Conference* in 2017.



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# MICHAEL & LONG BERNIER & DOAN

PRESIDENT/BROKER

CEO/BROKER

They also knew that they had to first determine how they were going to be different from the existing realty companies. So, the duo set out to develop a clear mission and to state what they wanted to bring to the market: brokers who listen and who provide relevant training, marketing, technology, systems and automation, and support that agents need to be successful.

Like Long, Michael's challenging background had a significant impact upon his business approach. Throughout his childhood in Minnesota, he experienced the continual struggles of poverty and lack of opportunity. Due to these frustrating developmental years, he decided early on that he wanted more in life than a traditional job and a limited opportunity. It was also during his youth that he developed a sincere desire to help others.

In fact, both Michael and Long are passionate about empowering their agents to be even more successful than they have been. Since 2014, they have traveled nationwide to every convention possible in order to become immersed in the latest technological advancements, best practices, new strategies, and new opportunities. Both men believe that the more they can learn, the better equipped they will be to assist their agents in achieving higher levels of success. Michael and Long even work together to relieve the company's agents from spending their valuable time on projects with little to no return so that they may focus their attention on higher-earning activities.

According to Michael, "the company is trying to create an impact for the agents that work with them as well as for the consumers they work with." Taking the time to study the constant changes in market trends and being prepared to meet the challenges head on is how Michael and Long have stayed ahead in the field and set Realty Group Inc. apart from all the other companies.

In addition to the numerous awards he and Long have received on behalf of Realty Group Inc., Michael is a former *Top 1% Agent in the state of MN*, and currently serves as a professional real estate coach for Club Well.

“The reason for our success is that we have learned to LISTEN, REACT, and PIVOT.”

As president, co-owner, real estate broker, and sales manager of Realty Group Inc., **Michael Bernier** shares a vast number of responsibilities with his business partner, Long Doan. However, Michael also has his own unique role in the company. Acting as part visionary and part implementer, he devotes a great deal of his time to agent development where he works to equip agents with the tools, the mindset, and the skill sets they need to become even more successful in the field. This involves a lot of one-on-one as well as group education and development. Michael also takes a leading role in strategic planning to help grow and scale Realty Groups business model.

However, Michael admits that today the company looks much different from when he first started. In 2014, when he became a fifty percent co-owner of Realty Group Inc., he and Long had only eight agents working with them. The partners knew they wanted to shift the way they had conducted business in the past when they worked with banks and foreclosures.

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Realty Group has reacted to the needs and desires for building their company, and that action has resulted in building more platforms, technology, and support for their agents.

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With over 27 years in the real estate industry, **Long Doan** has a proven track record as a successful broker with comprehensive experience in the lending, selling, marketing and management aspects of the business.

Long is a renowned real estate broker and the founder of the Realty Group, a full service brokerage based in Minnesota. He founded the Realty Group in 2009 and based his business goals on values that he learned from his family who fled Vietnam in the early 1980's as the country fell under communist rule.

The son of two highly educated professionals, when he was only eight years old, Long's father was taken away from his family and brought against his will to a reeducation camp in Vietnam. Despite the name, reeducation camps were actually prisons where inmates were forced to be "reeducated" with communist doctrine through torture, starvation and forced labor. Long's mother struggled to raise her family alone and found it overwhelmingly difficult to continue to live under such oppression. At only 13 years old, Long escaped Vietnam as a "boat person", initially spending a year at a Malaysian refugee camp before finally arriving in the United States under the sponsorship of an uncle who lived in Minnesota.

Following in his mother's footsteps of working numerous jobs to support her family and never giving up, at 18 years old, Long worked three jobs to support himself and put himself through college while also supporting his younger brother who had eventually come to the U.S. He attended the University of Minnesota and studied electrical engineering and communications.

After college, Long began working as a mortgage broker and learned all aspects of the mortgage and lending industry. After spending 15 years on the mortgage side of the industry, Long made a successful transition into real estate sales and in 2009, he founded the Realty Group. In only four years' time, Long closed more than 1,000 transactions. Today, Realty Group is one of the largest independent real estate firms in Minnesota, employing over 400 agents that serve the entire state (Please remove). In 2014, Long and his business partner, Mike Bernier, started Realty Group 2.0 with only 8 agents and the vision of being the broker they wish they had when they were agents. Today, Realty Group is the fastest growing real estate company and the largest independent real estate firm in Minnesota, with over 400 real estate professionals serving the entire state.

Long explains that their goal is to help change peoples' lives by sticking to their three core beliefs: **people want to feel safe, people want to feel connected and they want to have a shared future.**



Long explains that the key to their business model is that they treat each agent as the CEO of their own company, providing coaching, support and the tools they need for success including training, marketing, compliance and the most innovative technology. He adds, "This is a rapidly changing industry – and we always want to stay ahead of it. Consumer behaviors are also changing. Our company attracts people who want to not just survive but grow their business. We are proud to say that our agents are averaging 104% increase in their business after joining us."

In addition to his professional accomplishments, Long and the team at the Realty Group have received numerous awards including being named The #1 Independently Owned Brokerage in Minnesota, Top 150 Largest Independent Brokers in America, Top 500 Brokerages in America and Top 1000 Power Brokers in America by Real Trends in 2019.



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With an impressive history in the real estate industry, Ricardo “Ric” Ruiz del Vizo attributes his success to the relationships that he has built and the personalized, elite services that he offers to his clients.

Ric is the founder of The DelVizo Group, a full-service real estate team based in Sarasota, Florida, that focuses on commercial and luxury real estate across the globe. As a resident of Sarasota for 36 years and a licensed real estate agent for over 13 years, Ric has a deep understanding of the Florida real estate market and beyond. Under Ric’s direction, the team at The DelVizo Group expertly assists clients with the acquisitions and sales of high-end, luxury, residential and commercial real estate. They provide concierge luxury real estate services to all of their clients through a strong network of qualified agents, intermediaries, and attorneys.

Prior to his latest real estate venture with The DelVizo Group, Ric successfully launched two boutique real estate firms, one of which subsequently merged with Keller Williams Realty. Ric then went on to launch the Luxury Homes Division and Commercial Real Estate Division for Keller Williams in the Sarasota area. Ric also formed a commercial real estate team, Optimus Commercial Real Estate Investment Advisors, which later became its own real estate investment and commercial development brokerage partnered with JBCC Development.

In addition to a prosperous career in real estate, Ric served in the military as a highly decorated combat veteran and 20-year law enforcement veteran. He contributed to many operations during his military and law enforcement career, including working as a close protection specialist for several dignitaries and high-ranking officials, teaching counter-terrorism operations and working as a liaison to the Central Intelligence Agency.

Dedicated to his values of protecting and serving, Ric offers safety training to real estate agents through his *Safe Agent Real Estate Agent Safety Training Program* and is currently developing this training as a certification program for real estate agents, offered through an online training platform. Ric’s goal is to make the safety of real estate agents a priority in the industry and adds, “This course is designed to not only protect agents, but to protect client assets as well.” His safety training initiative is a cross-sector training program that can be tailored to various business and education environments to include active-shooter scenarios as well as workplace violence.

In addition to his accomplished career in real estate, Ric strives to give back to the industry he loves by coaching and mentoring other real estate agents. He is dedicated to his business and personal philosophy of building strong relationships and providing stellar service.

Ric is a member of the National Association of REALTORS®, the Florida Association of Realtors, the International Consortium of Shopping Centers, and the Institute for Luxury Home Marketing. He is an accredited buyer’s representative and certified for home inspections, short-sales, and foreclosure resources.



## RICARDO “RIC” RUIZ DEL VIZO

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### FOUNDER, DELVIZO GROUP



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# DARREN NASATIR

President, Urban Commercial Property Group

As president of Urban Commercial Property Group, Inc., Darren Nasatir's primary focus is new business and client relations. Since its launch in 2012, Urban Commercial Property Group has grown from a one-man brokerage to a full-service commercial real estate firm with a highly experienced team of employees.

Nasatir has guided the company to become an industry-leading boutique full-service commercial real estate firm. His efforts have led to the ownership, management, and leasing of more than \$50M in assets. As an industry leader, Nasatir explains that his team takes risks and considers properties that others in the industry discard, then implements Class A amenities, white-glove management, and finishes found in premium buildings.

"Our market advantage is we bring affordable and beautifully maintained properties to people in our neighborhoods that can't be in the Class A budget space, but still want to be in extremely presentable, amenity-rich buildings."

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**"I am always looking for ways to improve the buildings we own and manage, and I like to be proactive by embracing trends and technologies often before they're mainstream."**

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As the manager of the firm's direct ownership portfolio, Nasatir oversees retention as well as transaction and asset management.

In addition to his personal commitment and drive, Nasatir credits his business success to the collaborative effort of his team. He explains that over the years, together they have turned the company into what it is today: "I rely heavily on my team and do my best to foster self-development. I believe that my people strive for the best because that's what we offer and that's what we want to be." The one-team philosophy is highly valued within his business model and Nasatir reflects, "Our passion for delivering service and fostering teamwork while managing high risk, high reward purchases has contributed to outstanding revenue growth for our portfolio. Under my direction, we have exceeded direct ownership of \$25M in assets."



Photo Credit: Krissy Yurko

The success of his business and the collaboration of his team is a result of the elite leadership that Nasatir exhibits in every aspect of his personal and professional life and it is apparent as he shares his pride: "My team is incredible and I look forward to what the future holds for all of us."

In addition to his professional accomplishments, Nasatir was the recipient of the *Costar Power Broker Award* in 2012, 2014, 2015, 2017, and 2018 and received national recognition in *Real Estate Forum's Top 50 under 40 in Commercial Real Estate* in 2017.



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Exit  
Realty  
Scenic  
Group

**Eric  
Bradshaw  
&  
Ben  
Phillips**

# Q & A

## **Tell us about your business, HomeRate Mortgage?**

Ben and Eric founded HomeRate Mortgage in November 2013. We built the business from scratch; originally, we started under a different brand in 2010, but as nationally recognized loan officers ourselves, we created our own brand three years later. Our talented and professional team is still in the same location. HomeRate Mortgage handles all aspects of residential financing including loans for purchasing, refinancing, HRM and more.

Based in Tennessee, we are a local business, run by local residents and have established a notable local brand name. We are extremely competitive with our pricing, and our loan officers and processors are extremely receptive.

## **What sets you apart from your competition in the industry?**

HomeRate Mortgage handles home loans with expertise. We close loans quickly and do more volume than anyone else – bar none. We are absolute experts on loans. Both of us were raised in military families, so we have a comprehensive understanding of that specific business sector. We also work with the Wounded Warriors organization and donate annually to the golf tournament

HomeRate Mortgage consistently offers better pricing than national competitors, because we utilize innovative technologies that allow us to compare pricing and better understand our competition. This has launched us into the top 10% of the competitive rate.

## **What is the culture like for employees at your workplace?**

One of the biggest things we do is help our people grow. HomeRate Mortgage is not only focused on our clients, but also focused on the big picture – which includes our employees. Since we are expanding, we offer some employees the opportunity to work remotely and will help them set up their own offices.

Compensation is, of course, an important factor as well, and our loan officers receive a base pay as opposed to 100% commission – this leads to more volume. Our loan officers can close over 20 loans a month, which is unheard of - but it is a testament to the great system that we have in place. Most of our loan officers make a 6-figure income and the top 10% make 116k or more nationwide.

## **What are your responsibilities with the business and what led you here?**

**Eric Bradshaw:**

I focus on managing the marketing and operations part of business as well as recruiting. I oversee our technological operations; I make sure we are constantly upgrading our systems to make sure we are using the most innovative technology to do our jobs most efficiently.

I started in the mortgage business in 2005, working for HSBC as an AVP. It was a huge business that went downhill in 2009. Half the people in Tennessee that were licensed left the business, but Ben and I stayed on and eventually opened our own business. While it was a bad time in the business world, it ultimately launched our success because we were great at what we did and had very little competition at the time. This evolved into us being the best at what we do today: helping people to get the best loan and mortgages at the most affordable price.

In addition to my business experience, I have a BBA in marketing from Lambuth University. Today, I am happily married and the father of two great kids.

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We are firm believers that if we help our people grow, we equip both clients and the entire business alike to thrive.

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**Ben Phillips:**

I manage the hiring and inspiring aspect of the business. I am the voice on our commercials and together, Eric and I write the commercials. I have always strived to live a successful life. I was a state champion in high school, which led to a scholarship in college, and I also received academic honors—so I have always had a competitive attitude. I started my career with Arthur Anderson, the accounting firm, and after that business was tarnished in 2001, I moved into the mortgage business, eventually opening my own business. I was born and raised in Tennessee, and we are truly a local business that we built from the ground up. I am married and happy to be raising my three children in my home state.

**Any other business ventures?**

Three months ago, we opened up a real estate office, Exit Realty Scenic Group. We work with clients throughout the state and beyond on home and property sales and purchases. We also bought a preschool last year – so we consider ourselves much more than just mortgage people. We are seasoned entrepreneurs that are always looking for new opportunities.



Eric Bradshaw

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Our business recently placed in the *Top 3 Financial Companies* for *Chattanooga's Best of the Best Award*.

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Eric Bradshaw and Ben Phillips  
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Ben Phillips



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# DAVID TOUPIN

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David Toupin is the co-founder and owner of Obsidian Capital, a real estate investment firm based in Austin, TX that focuses on the acquisition of large multifamily and commercial properties. The company targets assets in Texas, but also in other primary markets around the country, to provide strong financial returns and long-term wealth for its investors. With a focus on value-add multifamily assets, the company works with investors to buy, renovate, fix, cash flow, and sell properties to provide strong, long-term returns on investment.

Obsidian Capital, which David founded with industry veteran Glenn Gonzales, has purchased nearly \$50 million in assets in its first year alone, and is on track to \$100M in Assets Under Management in the near future. The company's exponential rise is no surprise, given David's lightning-fast journey from college student to real estate investor. Driven by a combination of determination, business savvy and entrepreneurial spirit David catapulted to early success as one of the nation's top millennial real estate investors and entrepreneurs by the age of 24.

David bought his first property, a 12-unit apartments complex, when he was just 20, while in college pursuing his finance degree. By the time he graduated, he had built a portfolio of over \$7 million in multifamily real estate. Successful in his own right, he

met Obsidian's cofounder at a conference. "We realized we were doing the same thing separately and had great synergy. I had been investing in properties in Michigan for 3 years, and he had been doing so in Texas for 30 years. We share the same drive, the same approach—we're both very conservative and we both put our investors' interests first," David explains.

David's ambition and valuable skill set combined with his business partner's vast experience in every aspect of property management and ownership make for a powerful symbiotic team for their clients, as Obsidian Capital continues to grow. Additionally, Obsidian is in the process of building a software company that will convert their top selling multifamily analyzer spreadsheet into a web-based platform. "We are creating the strongest and most efficient online platform for multifamily investors to underwrite and financially analyze deals," said David.

"This is an exciting time for Obsidian. We have grown rapidly over the past 12 months, and that growth will only continue as we begin our ground-up development branch in addition to our recent venture with our new software company. Our mission is not only to provide a great place for our investors to create wealth but also to be leading innovators in the real estate industry," David explains.

## **WESLEY P. HUDSON, CPA**

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As founder and managing member of Atlanta-based Otemanu Group, LLC, and Otemanu Capital, LLC, Wes Hudson brings his clients over 25 years of experience as a real estate advisor to provide guidance on all aspects of commercial real estate investments. A skilled CPA, he provides investors and developers tax mitigation strategies, tax and financial modeling, and pre-acquisition/development due diligence and structuring.

Wes represents affluent clients who are looking to invest in the commercial real estate sector. He considers himself a “matchmaker,” bringing together those clients with the assets to invest with the deals that need investing and equity, and with a record of transactions ranging from \$20 million to over \$4 billion, the moniker suits him perfectly.

As a former partner and Opportunity Zone national leader for Cherry Bekaert, one of the nation’s largest accounting and consulting firms, Wes is an authority on the Opportunity Zone market and an expert at tax-incentivized real estate transactions, an area few accountants specialize in, and he adds, “I focus on helping people monetize taxed credits, tax losses, and tax benefits related to real estate transactions.”

Based in Otemanu Group’s Atlanta office, Wes serves clients

throughout the country, helping them to reach their financial and investment goals. His clientele extends across diverse sectors of the real estate market, including real estate holding companies, developers, contractors, private equity funds, high-net-worth/high-income individuals, and institutional capital.

Wes is also a sought-after public speaker, sharing his experience and expertise on various topics related to investment opportunities at industry events and conferences throughout his career. Most recently, he spoke at the State of the Market Conference, where he presented a comprehensive program to investors with liquidity events. He is considered a trusted advisor by those clients who take advantage of his knowledge and relationships.

Prior to his current role at Otemanu Group and his previous position with Cherry Bekaert, Wes served for 18 years as the Southeast leader for commercial real estate at CohnReznick, LLP, a top advisory, assurance, and tax firm. Wes graduated from Auburn University with a master’s degree in accounting, with a tax specialization, and he is a certified public accountant. He is active in several real estate organizations, including the Real Estate Group of Atlanta (REGA) and is the former treasurer of the Urban Land Institute.

# Stan Bril, CEO



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For me personally, it isn't so much about making money. It's about doing good, clean business. Financial gain is relevant to this business model, but it's important to do it right, and help people in the process.

**Stan Bril** attributes his determination and success in life to his own experiences as a child, watching his family struggle to escape communism and religious persecution, and ultimately relocating to a foreign country in order to start a new life.

Stan was born in Eastern Europe in the Soviet Socialist Republic of Moldova. The son of Jewish immigrants, Stan and his family moved to the United States when

he was just seven years old with the support of the *Soviet Jewry Movement*, an international human rights campaign that advocated for relocation rights on behalf of Jews in the Soviet Union, and HIAS, a Jewish-American, nonprofit organization that provides humanitarian aid to refugees. His family's journey was both long and arduous. They spent two weeks in Austria and four months in a refugee camp in Italy, before finally arriving in the United States.

Stan's parents had little money and limited employment opportunities, due to the language barrier. They also had to support three children; Stan, his older brother, Lenny, and his sister, Bella. Stan's older siblings were in high school and preparing for college. His father worked diligently as a meat packer but soon found a better opportunity as a mechanic and worked his way up to a lead mechanic for a Volvo dealership. His mother found work as an aid to senior citizens and as a translator and liaison to newly arrived Russian immigrants. Stan explains, "We were only the fifth Russian family in Savannah".

Stan started his primary education in America and quickly discovered his fondness for sports in middle school. He excelled at baseball and basketball but was especially gifted in soccer. Stan worked his way through high school and eventually matriculated to Brooklyn College, where he competed as an *NCAA – Division I Soccer Player* and played on the MLS (Major League Soccer) team, Metro Stars. Stan then completed his bachelor's degree in business administration and finance with Phoenix University.

After college, Stan moved to Philadelphia and worked as a loan officer, mortgage originator, and branch manager, learning the ins-and-outs of finance and the mortgage industry. During the height of the financial crisis of 2008, Stan realized how difficult it was for consumers to get approved for mortgage loans and decided to start a new business that would ultimately redefine lending.



In March 2009, Stan founded MCG, a private lending institution that focuses on real estate and business funding for commercial, rehab, construction, and business loans. While still developing his business, Stan furthered his education by attending Salem International University, earning an MBA in international business, economics, and finance.

As the founder and CEO of MCG, Stan oversees the day-to-day operations of the business, while dutifully managing compliance, developing business plans, creating financial and budget reports, and architecting systems and controls to identify potential risks.

He also supervises an experienced team of professionals, who help businesses of all sizes grow and prosper in diverse markets.



Much of MCG’s achievement is built upon our ability to work with all types of consumers. We don’t have a specific requirement list because each deal is unique and unlike other lenders, who have much stricter lending requisites, we look at each deal individually.

Whether it’s investing in various businesses, funding real estate transactions, funding large business loans, handling acquisitions, or financing lines of credit for entrepreneurs, under Stan’s leadership, MCG has become a leader in the world of financial products and services.

Stan attributes much of this success to the company’s unwavering ethical practices and a stellar reputation, predicated on client testimonials.

As a result of their business model, MCG has become a leader of commercial financing throughout the nation. They currently manage \$200M+ in private equity funds, have independently funded over \$1B in transactions, and have brokered more than \$5B in transactions.

MCG currently operates six offices in the U.S., as well as additional locations in Barcelona, London, Sofia, Bulgaria, and Chisinau, Moldova. Stan hopes to continue expanding MCG’s lending footprint along with their portfolio.

Stan elaborates, “Fortress Investment Group (a fund out of New York) currently manages over a \$70B and have been around for 20 years. MCG has been around for half that time and we should have half of what they manage, but we don’t. It’s my duty to ensure that we’re continually evolving and pursuing the biggest goals. It’s a matter of always being cognizant of who’s above us and how we can get to the top.”

Running a business of this magnitude is a full-time commitment and requires relentless determination. Nothing made this more apparent than when Stan underwent open-heart surgery in 2013. After the surgical procedure, which remedied a genetic heart defect, Stan pushed even harder to succeed, even when facing adversity. Stan adds, “The human spirit is amazing and if you put all of your will and effort into something – you can achieve anything.”

Stan is equally committed to fostering a strong home environment and devotes all of his free time to family. He has been happily married to his wife, Albina, for nine years and together, the couple has two children; a son, Ethan, who is 7, and a daughter, Eliana, who is 6.



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## JENNIFER WILLSTEAD

President, Mack Property Management LP  
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NEW Website launching December 2019: [www.mackmgmt.com](http://www.mackmgmt.com)

Jennifer Willstead currently serves as the president of Mack Property Management LP (“MPM”), an affiliate of Mack Real Estate Group. Formerly known as Winthrop Management LP, MPM employs approximately 150 property management professionals, and is responsible for a portfolio of approximately 4,000 residential units located throughout major US markets including Seattle, New York, Los Angeles, and Florida, and more than 3.6MM square feet of commercial space nationwide. Jennifer is responsible for the daily residential and commercial on-site operations, as well as all aspects of the corporate operations including maintenance and engineering, training, career development, marketing, accounting, and human resources for the business.

Jennifer was recruited to what is now MPM in 2018 as part of the effort by Mack Real Estate Group, a national real estate investment firm, to build out a fully integrated organization complete with an in-house property management division capable of handling Mack investment properties as well as third-party management work. Paul Keller, a vice chairman of

Mack Real Estate Group states, “We needed someone with the resources and knowledge to lead the company toward our new goal to position MPM as a world class management firm.”

Jennifer willingly accepted the challenge and has been intimately involved in the repositioning and rebranding under the Mack Property Management LP name over the last year. She and her team have been focused on introducing consistency in operations, new technology to provide operational efficiency, as well as strategies to build and grow their 3rd party portfolio, which will operate as a sub-brand to MPM and is set to launch in the first half of 2020. Jennifer adds, “This is a very exciting time for our business and our team members. We are positioning to double in size over the next five years, and I couldn’t be more excited to lead this company into our next chapter.”

Richard Mack, CEO of Mack Real Estate Group, stated when Jennifer joined the company, “We are thrilled to have Jennifer join the team, and confident that she will bring her enthusiasm and professionalism to the role.” He continued “Quality management underpins many of our business lines and the professionals we select are essential to our success.”

Prior to joining MREG, Jennifer spent over eighteen years working in all aspects of the multi-family industry. She has served in several positions, starting as a leasing consultant with AvalonBay Communities in 2000, and working her way up through the ranks. “I first got into the business when I applied for a leasing job, thinking it would be interesting to work with people by showing apartments. From that simple start came much more, a passion for; and in-depth understanding of the business of apartments. This was where I was meant to be, and I never looked back.” Jennifer credits her colleagues who trusted and believed in her because of her knowledge, performance and work ethic, and as a result she was often given more responsibility and promoted throughout her career.

Jennifer is thankful for the amazing mentoring relationships she found and nurtured through the years. “I couldn’t be more grateful for two women in particular; Heidi Voss, who brought me into the industry, and Heather Moore, who continues to challenge me in ways that truly helps drive my success in this business.” She adds that each of her prior managers have helped to shape her career in one way or another and will always be grateful for the professional experiences that led her to where she is today.

### About Mack Real Estate Group

Mack Real Estate Capital Group LLC, dba Mack Real Estate Group (MREG), is an enterprise devoted to managing institutional, high net worth and Mack family capital by making debt and equity investments in real estate and real estate-related securities through several distinct business lines and legal entities. MREG currently specializes in domestic and international real estate investment, development and financing opportunities with a view toward long term performance and hands on management. The company and its affiliates bring together the expertise to recognize and analyze new real estate investment opportunities with the speed and flexibility necessary to execute on them.

# MICHAEL MOORE

Senior Vice President  
Compass

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A HARD  
WORKING,  
RESPONSIVE  
AND  
RESOURCEFUL  
AGENT.

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Known for his unrivaled knowledge of the real estate market and his commitment to delivering exceptional customer service, Michael Moore is one of the area's most successful and sought-after agents. Thanks to his designer's eye, unique appreciation for each home's story, and intuitive ability to match buyers with the right homes, Michael has received the highest caliber of recognition from peers and clients alike throughout his 30-year career.

Michael's in-depth knowledge of the development and construction industry and his exceptional ability to seamlessly manage renovation projects for his clients set him apart from his colleagues. Licensed in Washington DC, Maryland, and Virginia, he has built a stellar reputation as a hard-working, responsive, and resourceful agent. He has cultivated a robust referral network over the course of his career, which accounts for much of his business today.

In addition to his professional accomplishments Michael enjoys traveling, biking for charitable causes and exploring Washington DC's eclectic restaurant scene.

## COMPASS

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"I was always very social and analytical-minded," says Chris, "and this played a key role in my ultimate career path into acquisitions."

After two years with MCS Capital, Chris transferred to CVG Properties, where he ran their acquisitions department and assisting with \$200 million in transactions. Simultaneously, Chris launched his own firm, Bade Investments, where he started making his own investments with family and friends.

By 2018, Chris decided to join forces with the principals of Sterling Real Estate Partners. Together, they envisioned an entity where all the aspects of multifamily real estate transactions were done in-house; from property management, project management, legal counsel, and acquisitions. Chris handles the acquisition aspect, as well as a good portion of the project management, including construction and interior renovations. In April of 2018, Sterling Real Estate Partners had just two full-time employees in and by the summer of 2019 they had eight full-time corporate employees and sixteen site employees.

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**"I WAS ALWAYS VERY SOCIAL AND ANALYTICAL-MINDED AND THIS PLAYED A KEY ROLE IN MY ULTIMATE CAREER PATH INTO ACQUISITIONS."**

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In September of 2019, *Yardi Matrix* ranked Phoenix as the fourth largest market in the United States for multifamily rent growth, driven by, "a solid job market and steady population growth." According to the U.S. Census Bureau, the Phoenix area had more than 25,000 new residents in 2018 and is the fifth most populous city in the United States. This all translates to a very busy future for Sterling Real Estate Partners.

Born and raised in the Phoenix area, Chris feels strongly about participating in local charities. He is involved in the Arizona-based charity organization, Executive Council 70 (EC70). Established as the volunteer force supporting Executive Council Charities, EC70 is a group of 70 professionals dedicated to helping the youth in Arizona through various fundraising events and initiatives. In the past five years, the non-profit, Executive Council Charities, has given nearly \$10 million in support to local youth charities.

In his free time, Chris enjoys off-roading, scuba diving, and he has a passion for flying.



## CHRIS J. BADE

Acquisition & Project Manager

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Chris Bade is an acquisition and project manager at Sterling Real Estate Partners in Scottsdale, Arizona, a real estate investment company focused on value-add and value creation for multifamily properties. In 2019, Sterling Real Estate Partners surpassed \$100 million in acquisitions in just three transactions. The company is actively pursuing opportunities in Arizona, Texas, Utah, and Nevada, and currently has a portfolio of over 1,500 units.

Chris attended Arizona State University's W.P. Carey School of Business, where he earned Bachelor of Science degrees in economics and finance while competing on the ASU Rowing team. After graduating in 2013, Chris started his career as an investment broker with Source Capital Group. In 2014, he took a job with MCS Capital Partners, where he worked in the student housing acquisitions group and assisted with investor relations, accounting, and project management. This is where Chris got his first experience in acquisitions.

# MARIA BELEN AVELLANEDA

Licensed Associate Real Estate Broker

Award winner and nominee, Maria Avellaneda, is one of NYC's top producing agents. In 2016, she was a *Top Producer Individual* by sales volume and GCI. This high achiever received, among other recognitions, the *Forbes Argentina 30 Promises*, the *Forbes Argentina Power Women 2018*, a *Quadruple Platinum Award*, and was featured on the cover of *Outfront Magazine* in December 2016. She is known as one of the smartest and most dedicated agents in the city and has often been engaged as a speaker for high-profile events by top universities and for industry gatherings.

Maria has earned an excellent reputation with high-end developers. Her clientele includes some of the wealthiest family offices in the world, including royalty, and she works to attend each generation's needs and risk profile. She is the perfect agent for the most demanding clients and runs her business 24/7. Real estate is both a passion and tradition for Maria. She and her family have been investing in New York and Latin America for the past 30 years, acquiring prominent properties on Central Park South, Park Avenue, Upper East Side, and Midtown West. This allows Maria to provide not only her brokerage experience, but also first hand investment expertise. She is known for executing complex deals, including 1031 exchanges, bulk sales, residential, and commercial.



Maria moved to New York several years ago to study at Columbia University, where she obtained a master's degree, focused on international finance, economics, and quantitative analysis. Her dexterity, professionalism, and diligence make her a flawless agent for local and international investors. Maria prepares exclusively personalized portfolios with tailored solutions for her clients and leverages her knowledge to maximize value and profitability. Whether you are a developer, a sophisticated investor, or a first-time home buyer, she will provide exceptional, high quality research material and advice to help you throughout any real estate transaction. Maria is acknowledged by her clients and peers as one of the most professional and honest individuals in the industry. She is a problem solver by nature and clients can count on her, even after their transactions close. Whether it is dealing with hard tenants, management companies, contractors, or architects, she is always there to help out.

As someone who is culturally savvy, she works with investors from every corner of the world, including the US, UK, China, Russia, India, Singapore, HK, Israel, Dubai, Qatar, Argentina, Colombia, Brazil, Mexico, Canada, Spain, Chile, Germany, France, Netherlands, and Uruguay. After acquiring more than a decade of experience in finance, management, and diplomacy, Maria developed an unparalleled understanding of real estate markets, negotiation, and investment processes. Prior to joining Keller-Williams, she was senior advisor to multi-million-dollar family offices, governments, and multilaterals. She worked as a consultant at The Inter-American Development Bank, The World Bank, The United Nations, and The U.S. Treasury, as well as at premier financial institutions. When involved in capital markets transactions, she has excelled in her dealings with investment banks and rating agencies, providing advice to several CFOs, CEOs, and company owners.

Maria was born in Argentina, where she graduated *summa cum laude* with a bachelor's degree, while ranking first of her class. She speaks English and Spanish fluently and has working knowledge of French and Portuguese. She and her husband, a successful investment banker, are involved in numerous charitable causes, including UNICEF-USA, the Robin Hood Foundation, SEO, and 100 Women in Hedge Funds. After years of ranking as a top agent, Maria joined Compass, the largest privately owned, technology-oriented brokerage in the U.S. The company is currently worth over \$4B. Main investors include Soft Bank, Goldman Sachs, Fidelity Investments, Wellington Management, Advance Publications, IVP, Founders Fund, Kenneth Chenault, Marc Benioff, and LeFrak. Whether you are considering buying, selling, or leasing contacting Maria is a must. You will find an agent who is smart, trustworthy, and resourceful.



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# FIRAS TURKMANI

## DIRECTOR OF HOSPITALITY GROUP

Although he was born and raised in Washington D.C., Firas Turkmani is a life-long world traveler. With an eclectic background consisting of being half Korean (mom) and half Lebanese (dad), both of his parents are immigrants. The family has always enjoyed traveling together, and Firas has already visited 46 different countries over the past 27 years of his life. "I think hospitality has always been running through my veins," Firas says.

After graduating high school, Firas attended the Cornell School of Hotel Administration in New York. He selected Cornell because of its reputation for having one of the strongest networks of any university. In fact, the school prides itself on the alumni staying connected and engaged. Therefore, after Firas earned a Bachelor of Science degree with a minor in real estate in 2014, he became a board member of the Cornell Real Estate Council in hopes of establishing a proper program for alumni who are in the real estate industry to stay connected post-graduation.

Firas began his career as a financial analyst with Wells Fargo. He worked in the Hospitality Finance Group, analyzing key credit metrics, including capitalization, cash flow, sponsorship, and coverage levels. During his time with the company, Firas helped originate more than \$300 million of fixed- and floating-rate loans.

Today, Firas is a director with Ackman-Ziff's Hospitality Group, where he assists in the origination and placement of debt and joint venture equity. Since joining the group in 2014, he has closed over \$3 billion in raised proceeds across redevelopment, ground-up, acquisition, leasehold, and specialty structures. At the firm level, Ackman-Ziff facilitates approximately \$6 billion per year in raised proceeds across all asset classes.

However, according to Firas, what sets Ackman-Ziff apart from other capital advisors is not the amount of money they raise each year, but rather the integrity and ethos of the firm. Ackman-Ziff is a privately held boutique real estate capital advisory firm with over 90 years of business experience and a reputation for building long-lasting relationships with their clients. Firas explains that clients choose their firm because they know that Ackman-Ziff's professionals genuinely care about honest communication and managing expectations for both the client and capital sources.

Firas is looking forward to building his next chapter at the firm as a leader in the hospitality industry. He says that being surrounded by intelligent and ethical professionals is the ideal environment for success. Additionally, having a background in hospitality has been essential to understanding both the operational and capital structure of hotel finance. Working for Ackman-Ziff has given him the confidence to optimistically look forward in the future, regardless of market conditions. He believes that a more volatile market provides abundant opportunity to help clients, because it is during the rough times that people are in most need of an advisor.

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REAL ESTATE CAPITAL ADVISORS

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# DEREK ANTHONY

Assistant Vice President, The Woodmont Company

With an extensive corporate background in sales, marketing, finance and operations, Derek Anthony has successfully transitioned into a lucrative career in real estate. As a commercial real estate broker and assistant vice president with The Woodmont Company, a full-service commercial brokerage, development, and property management firm, Derek utilizes his astute client relationship and negotiation skills to assist clients and investors with the buying, selling and leasing of commercial properties throughout the nation.

Derek began his career in real estate in 2008 with Perry Homes. After gaining over 15 years of valuable experience working in a professional, corporate environment, and selling to national and regional retailers, he assisted a local real estate agent with open houses. After graduating from Missouri State University with a Bachelor of Science degree in marketing, Derek began his venture into the corporate world, working for several manufacturing companies. He spent seven years as the director of sales at Coby Electronics Corporation, where he gained global experience in marketing, sales, P&L, acquisitions, and product development, while also managing and mentoring the sales team. He continued working in the manufacturing industry, with roles as the director of sales & marketing for both Uniden and TMAX Digital, Inc., with well over \$400M in sales.

Derek explains that his years in manufacturing provided a great experience and a strong foundation in the sales and business world, but he always had a passion for real estate. He knew that he could apply the skills that he acquired in his previous career to a new endeavor in the real estate industry.

Derek realized that his background and experience in the corporate world more closely matched the commercial real estate industry and he changed his focus. Derek explains that he attended a broker's event, where one of the guest speakers was Stephen Coslik, the chairman of The Woodmont Company, and he had an immediate affinity for the business. He joined Woodmont in October 2017, and today he focuses on the brokerage aspect of the business, tapping into his experience in logistics, demographics, new business opportunities, and above all, relationships.

Derek has a life-long designation of GRI (Graduate of Realtor Institute) certified through the Texas REALTORS, and is certified by the Texas Economic Development Council. He is also involved in his community and is a member of the board for the Economic Development Committee of the City of Keller, Texas.



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## NATHAN LEIBLE

Vice President of Residential Property Management



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Nathan Leible, vice president of residential property management for the Onni Group, took the helm two years ago with a primary focus; to take on the multifamily residential portfolio and to launch the Los Angeles market. When Onni Group, a Vancouver-based commercial and residential developer with more than a 50-year history of building communities in Canada, Los Angeles, Phoenix, Chicago, and Seattle, set its sights on LA, Nathan was the obvious choice to lead the way. Having called the city home for over 15 years and overseeing LA residential leasing, development, and management projects for the entire duration of time, he not only knows the neighborhoods, he is also an expert on the LA real estate market.

In just two years, under Nathan's direction, the LA residential core market, soon to be Onni Group's largest, has grown

at a parabolic pace. "When I joined the company, we had no residential presence in LA; we had three employees in the department. Now, with the new developments in our pipeline, we have over 40 and by year's end, we will have doubled that. Onni is transforming neighborhoods here and I am thrilled to be helping them continue to grow. At the same time, I am assisting the successful owner-operator with building a portfolio of properties. I have the luxury of recruiting talent and building their careers on a daily basis and this is just the beginning."

Nathan's success as VP is in great part attributed to the broad insight and skills gained on his unique career path. From an entry-level leasing consultant while in college, through multiple corporate roles in property management, ancillary services, new development, and operations, Nathan has crafted a stellar, 20-year career.

In addition to launching the LA market and managing its lightning-fast development, Nathan has the crucial responsibility of recruiting employees. "I've basically held every role in this business and one of the most important things I learned is this; we are people first, employees and colleagues second. Knowing your people is key. Without the right staff, success and growth are limited. Understanding what people want from their careers, along with what their strengths and weakness are, is paramount to placing employees in positions that they can thrive in, personally and professionally."

This is especially important considering Onni Group's unique collaborative approach to its business. The construction, development, and operational teams are all made up of Onni employees. Input from all departments ensures that homes are constructed that consider the resident's experiences and day-to-day lifestyles. Design is a critical element; from floor plans to amenities, to the design of the communities. Onni's employees work together, side-by-side, project over project, with each department chiming in at each step, from project inception to completion, from what they are developing and how it should be developed, to amenities and operational flow.

As the face of Onni's residential division, Nathan directs teams of management, maintenance, concierge, resident services, and leasing professionals in order to manage each community. He explains, "It is rare that a career allows both personal and professional satisfaction. I'm very fortunate that I get to see the communities and residents flourish. I experience a sense of professional pride and accomplishment for contributing to Onni's growth and for helping its employees thrive. I really enjoy hiring smart people who bring ideas to the table because ultimately, we want to lead the industry in every way."

Onni Group continues to attract top tier talent to the residential property management team, as the company is known for growth and opportunity. With its robust pipeline and positive leadership, Nathan is very confident about the brand and their ability to continue finding the right people who will enhance portfolio offerings. "Our goal is to be the top preferred brand in multifamily, known for thoughtful design, a property management team that is warm and inviting, and ensuring that your home is comfortable. We will continue to hang our hat on providing great service and employing people who have a passion for what we do. We don't hire associates who want a job; we acquire talent who seek careers."

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## STEVEN LIBMAN

Managing Partner



As the founder and managing partner of a successful real estate investment firm, Steven Libman has over ten years of experience in the real estate business. He started by brokering deals, seeking out lucrative opportunities, and now, closing on profitable investments for his private investment firm, Integrity Holdings Group.

Steven is a managing partner with Integrity Holdings Group, a commercial real estate investment firm that is focused on creating stable, consistent, passive cash flow for their investors. In business for ten years, the firm has experienced tremendous growth and acquired \$65 million worth of commercial assets in 2019.

Based in New Jersey, Integrity Holdings Group has a national presence and focuses on the acquisition of value-add properties with a specific focus on multi-family, student housing, and self-storage assets in the Southeastern and Midwestern areas of the United States. The management team has over 35 years of combined real estate experience and demonstrated expertise in building foundational relationships, identifying attractive investments, and executing efficient management techniques that maximize investor yield.

Integrity Holdings is focused on identifying assets which have current in-place cash flow and strong returns through various value-add physical and managerial improvements. Integrity Holdings Group's stringent underwriting process and guidelines offer investors higher than average, risk-adjusted returns.

As a managing partner, Steven focuses on investor relations and oversees the day-to-day operations of the business,

including researching new deals, managing current deals, exceeding investor expectations, and speaking with new investors. He also plans and participates in various public informational sessions, where he and his team offer advice and education regarding commercial real estate, financial education, and alternative investment opportunities.

Steven explains why real estate investments are better options and less risky than the stock market; "There is lower volatility in our industry, especially in the asset classes we participate in. Unlike the residential side of the business, commercial real estate is more stable and consistent; and far less volatile than the stock market. It is a tangible asset, not like a stock, bond or mutual fund, and it never goes to true zero."

The team at Integrity Holdings Group is extremely passionate about financial education.

Steven explains, "There are three levels of education:

Formal: Reading, writing, and arithmetic, which we all learn.

Professional: The skills acquired to do your job and earn an income

Financial: The least talked about but most important aspect when discussing, creating, and preserving wealth."

Steven graduated from Boston University in 2004, receiving a B.A. in sociology. He is an active member and sits on the board of trustees at his church, is a member of the Forbes NY Business Council, host of the *Free from Wall Street* podcast, and has been published in Forbes multiple times.



## JASON M. JAKUS

Broker/Owner, NextHome Advisors



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What Jason's customers are saying:  
<http://jasonjakuscustomerreviews.com>

Listen to Jason's Podcast:  
<https://flrealestateroundtable.podbean.com>

Jason Jakus explains that his true joy in life comes from helping people. As an experienced real estate broker, national public speaker, best selling author and owner of his own real estate company, Jason has established a niche helping clients in difficult situations, sell their homes. "I love helping people, especially during difficult, stressful and emotional times. I started helping couples that were going through a divorce, sell their homes. I then worked with probate attorneys and estate attorneys to help families sell the homes of their loved ones who have passed away. The joy for me comes from helping people and bringing a smile to their face."

Jason is a real estate broker and the CEO and owner of Next Home Advisors, a national and innovative estate franchise that offers consumer focused branding, technology and marketing. They offer a flexible pricing model and competitive programs that empower brokers and agents to provide excellent service without compromise. Jason established the business in 2015 and now has three offices in Cape Coral, Fort Myers and Bonita Springs, Florida. As an experienced and active selling broker, Jason lists and sells luxury and lifestyle properties throughout southwest Florida and gets most of his business through the referrals of satisfied customers. Next Home was recently named as one of *America's Fastest-Growing Private Companies* on the *Inc. 5000 List* by *Inc. Magazine*.

In addition to being a successful real estate broker and business owner, Jason is also a best-selling author and a national speaker. His best-selling book, *Cracking the Real Estate Code*, focuses on the proven secrets and strategies of top real estate agents. He is also the author of two additional published books about managing a brokerage and the real estate industry and is a contributing writer for the business section of the *Fort Myers Beach Newspaper*, focusing on the current real estate market trends.

As a national speaker, Jason has been featured as a real estate expert on *FOX*, *NBC* and *CBS*, as well as various local and national radio shows. He is the co-host of the *Florida Real Estate Roundtable* podcast and the host of the *Dominate in Real Estate* podcast. Jason has also spoken at several *State REALTOR® Association Conferences* including *Triple Play* and *Florida Realtors®*.

Jason received a Bachelor of Science degree in marketing from Colorado Technical University and holds several certifications and designations including Certified Real Estate Brokerage Manager (CRB), Certified Residential Specialist (CRS), Graduate Realtor Institute (GRI), Short Sale Foreclosure Resource (SFR) and he is also a certified executive coach and a master certified negotiation expert.

In addition to his professional achievements Jason has been the recipient of numerous real estate focused awards including the 2018 *Florida Realtors® Realtor Achievement Award*, the 2017 *Broker of the Year Award* given by the Royal Palm Coast Realtor® Association, and the 2016 *NextHome Excellence Award*. He also received the 2013 *Quilly® Award* by the National Academy of Best-Selling Authors® for "Cracking the Real Estate Code."

# COLIN P. BEHRING

Chief Executive Officer, Behring Companies

As the third generation in a line of successful real estate developers and investors, Colin Behring has made his own mark as a savvy global real estate developer and financier. Today, Behring operates a future-focused global real estate development, private equity and EB-5 investment platform referred to as Behring Companies, based in San Ramon in the San Francisco Bay Area.

Behring's operation consists of three major components, including real estate development, private equity fund management and EB-5 investment. Behring's dynamic approach was cultivated through a 60-year family history in development and investment in the U.S. and China. This forged his current investment focus on transit oriented, urban-infill multifamily apartments and high-rise buildings.

Six days after graduating with a degree in business administration and management (finance) from Cal Poly (SLO) in 2006, Colin's debut began at the bottom as an intern analyst for Morgan Stanley Properties (MSREF) in Shanghai, China, which he refers to as the "unofficial headquarters of high-density urban living." That humble start, working on a multi-billion portfolio of China's most high-profile real estate developments, positioned him perfectly for his current real estate ambitions.

In 2008, as the only family member fluent in Mandarin Chinese, Colin joined his grandfather, Kenneth E. Behring, at Behring Group to begin work on a flagship 360-acre, 1,000 unit, mixed-use master planned residential community off the coast of Shanghai with an estimated value in excess of \$2 Billion. Following on that success in China, 2013 brought Colin new opportunities through a combination of depressed U.S. property valuations and the rise of emerging market interest in U.S. investment. Colin moved to assemble an investment platform focused on outbound investment from the Asia Pacific region to the United States into multifamily apartments.

As the chief executive officer, Colin has skillfully guided the Behring Companies from its inception in 2013, to amassing an operation that is currently invested or financing over \$600 million in real estate developments. His Shanghai experience shortened the learning curve in deploying new innovative strategies in the Bay Area. They are one of the few developers in California that have the experience and



unique skillset to plan, design and build efficient high-rise communities. Remaining future focused, Behring has improved upon traditional urban design concepts by embracing unique operating models such as co-living, co-working, and tech-enhanced services specifically catering to a successful and highly efficient urban lifestyle. Colin explains: "In urban areas, housing commands so much of your personal resources – our company is unlocking value by providing a way to do it easier, cheaper and better."

Behring Companies is currently focused on its next flagship project located at 1900 Broadway in Oakland, California, and Colin adds that "it is a perfect example of where housing should be going: a 39-story tower offering a walkable and carless lifestyle with all the desired amenities to live, work and play in the same place." Our platform's ability to first develop, finance and then operate these communities is how maximum value is achieved. Behring explains: "Most developers get stuck at one phase or another. Our unique platform reduces the effort and cost at each stage, and investors ultimately benefit from these efficiencies and from higher caliber investment overall". Staying ahead of every trend and getting maximum value out of each property is surely what sets the Behring Companies apart from its competitors.

## CONTACT:

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## SUZANNE HAMILTON

Vice President, Commercial Real Estate

As a seasoned financial professional with a deep focus in commercial real estate, Suzanne Hamilton joined her current employer, ERIEBANK, to bring her top notch expertise to the business.

Suzanne is the vice president of commercial real estate for ERIEBANK. She has extensive experience with winning business, analyzing business opportunities, underwriting projects, and closing deals. Through her years of vast experience in commercial real estate and the investment, banking, lending and financial industries, Suzanne has remained an expert at building relationships while working across different business verticals and providing financial solutions to clients while helping to generate business and profits.

ERIEBANK, a division of CNB Bank, is based in Clearfield, Pennsylvania and has over \$3.3 billion in assets. CNB Bank is a publicly traded financial institution with bank divisions headquartered in Clearfield and Erie, Pennsylvania; Buffalo, New York; and Worthington, Ohio.

Established in 2005, ERIEBANK was built by local lenders from the ground up into what is now a full service suite of banking products and services for both commercial and residential customers. There are currently 11 full-service branches and they are now expanding their market into the Cleveland area.



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As a vice president, Suzanne focuses on the commercial end of the business and provides banking, lending, investments, deposits and a diverse selection of other products and services to the commercial real estate industry. She deals mostly with investors, property owners and business owners of commercial and residential establishments, including apartment complexes, retail centers, credit tenant leases, industrial property, and office buildings.

**“I lead with the lending side of the bank and transition into a full relationship with clients that includes private banking, deposits, investment services, merchant services and more; anything that will enhance the relationship and the services that we are already offering.”**

Suzanne began her career in the banking industry in 1991, after graduating from The Ohio State University with an M.B.A. in finance and marketing. Over the years, she worked for several banks and financial institutions, developing key skills and experience in sales, lending and investment strategies. She has lived in the Cleveland area for over 20 years and is very ingrained in the local community and the market place. “I love the urban lifestyle and all of the walkable places that surround the down town area.”

In addition to her professional accomplishments, Suzanne is very involved in community and charitable organizations. She is on the national board of directors for the *Human Rights Campaign*, the board of The Gordon Square Arts District, a past president of Commercial Real Estate Women, and a member of the Real Estate Advisory Group for Downtown Cleveland Alliance.

Suzanne has also been a featured guest speaker at local colleges and volunteers as a mentor through the *Young Leaders Program* through the Urban Land Institute, a nonprofit research and education organization that strives "to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide".

With over 16 years of experience in the corporate business industry, working in sales and management for several high profile, national organizations, Chris Karageuzian decided to use his expertise to start his own innovative company, Helpwithmyloan.com.

After graduating from California State University with a bachelor's degree in business administration and real estate, Chris began his career as a commercial banker for Coldwell Banker. From there he moved into management level roles at Wells Fargo and eventually was promoted to assistant vice president roles for both Chase and U.S. Bank. He was consistently a top performer at each company and received high honor awards and accolades.

In 2017, along with his co-founder, Jack Artinian, Chris decided to utilize his years of knowledge and experience in the real estate, banking, lending and financial industries and build his own business. Helpwithmyloan.com is an online one-stop-shop website that assist consumers with any type of loan they may be looking for including personal, business, commercial or residential loans. Chris explains, "A customer can visit our website, fill out an online application and they will be contacted within 24 hours by a representative who will discuss any lending opportunities that may be available." Helpwithmyloan.com has a database of over 300 lenders that they partner with, so customers don't have to go from bank to bank in search of financing. They serve customers much more efficiently than their competition and as a result, they have received a 95% approval rating on all loan funding compared to industry standards which is only in the range of 45-55%.



Chris Karageuzian, CEO

With over fifteen years of combined experience in the banking, lending, finance and real estate industries, Jack Artinian successfully transitioned into the role of successful business owner. Jack is the cofounder and managing partner of Helpwithmyloan.com, a business that he started with his partner, Chris Karageuzian in 2017. Helpwithmyloan.com is an advanced website that connects interested borrowers with a vast list of financial institutions without asking for individual data.

Helpwithmyloan.com was adeptly designed to be an online, one-stop-shop website that assists consumers with any type of loan they may be looking for including personal, business, commercial or residential loans. Customers can visit the website, fill out an online application and they will be contacted within 24 hours by a representative who can discuss any lending opportunities that may be available. The business has a database of over 300 partner lenders, so customers don't have to go from bank to bank in search of financing. They serve customers much more efficiently than their competition and as a result, they have received a 95% approval rating on all loan funding compared to industry standards of 45-55%.

As a managing partner, Jack oversees the operational revenue of the business including loan originations, funding and all financials. Jack continues to be impressed with the success of the company that he has helped build from the ground up and adds, "We have seen a lot of success; we achieved over 48 million in funding in the year 2018 alone and year to date we are already over 20 million. It has been a great ride so far and we continue to gain more and more experience to provide our customers with an exceptional service." The business is rapidly growing and since its inception, they have funded over \$55 million in all the areas of lending that they service. Chris drives the business with his competitive nature and strategic mind and believes that a great customer experience is based on how well you connect with people.



Jack Artinian, Managing Partner



## ARTHUR “AJ” STAGG

Broker Associate, Keller Williams

AJ Stagg credits his advanced education and his years of prior experience working in healthcare administration with helping him to achieve great success in the real estate industry.

AJ began his career in the health care industry, recruited through a management residency program by a large healthcare corporation when he was still an undergraduate. While working, he pursued and received his M.B.A. from the University of Central Florida. After a successful career in healthcare administration, AJ transitioned into the real estate business in 2012.

He explains that getting into real estate was a “happy accident” that completely changed his professional life. “I always wanted to become an investor. I learned the advantages of real estate investing from an investor that spoke to my high school senior class.” He began working as a property manager and then starting investing in and flipping properties. He started working for Keller Williams as a real estate agent initially to supplement and support his investment career but found his business as a REALTOR grew quickly, doubling his goal within the first year. At that time, he reassessed his plan and moved into a full-time role as a realtor, handling flipping and investments as a secondary role. “I have a true passion for real estate. I sincerely believe in it as a wealth building vehicle and a path to independence.”

AJ credits his success as an agent to his diverse and comprehensive background in business management and the healthcare industry where he gained valuable skills and experience, such as managing revenue and profit, employee relations, engagement, and accountability, process improvement, and the like. He also credits his education with providing him a robust foundation and understanding of the business and finance industry. He adds, “The barriers to entry into the real estate industry are relatively small. I believe my years of experience in the business and health care industries and my advanced education have really supported my growth and success.”

AJ is a dedicated agent that focuses on building strong relationships and using his expertise to target specific areas or demographics. He gets most of his business through referrals because of the trusted relationships that he has established and he explains, “My long-term goal is to have clients for life.”

As a licensed agent and broker, AJ appreciates the opportunities and flexibility that Keller Williams offers as well as the innovative technology platform that they use. Keller Williams is the largest real estate franchise in the United States by volume, transactions, and the number of agents. Listed as one of the *Happiest Companies To Work For* by *Career Bliss*, AJ says that he really does love the culture of the company. “It is a family atmosphere that really respects and cares about all of the employees.”

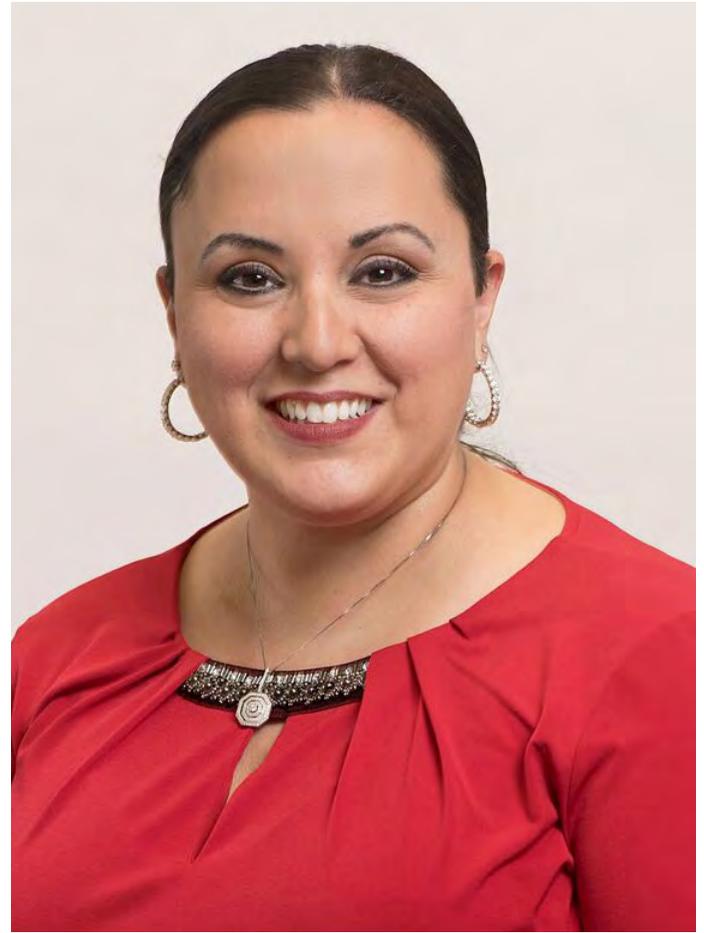
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**“I have a true passion for real estate. I sincerely believe in it as a wealth building vehicle and a path to independence.”**

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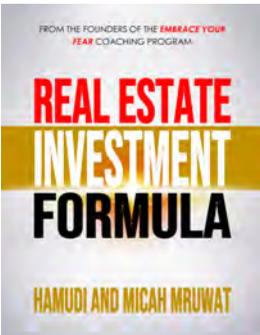
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## MICAH MRUWAT

Broker Associate, eXp Realty

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LI: Micah Mruwat | FB: Micah Mruwat | IG: Micah Mruwat



As a successful real estate agent, investor, mentor, business owner and mother of two boys, Micah Mruwat seeks out opportunities, she doesn't wait for them.

Micah is an experienced broker associate with eXp Realty, where she has worked in numerous capacities for the past five years including roles as managing broker and regional development leader. Through her years in the business she has built strong relationships and has expanded her group to over 400 agents beyond the state of Oklahoma, with plans to expand globally. Along with her husband Mohammad, Micah is also the founder and co-owner of Mruwat Enterprises, a lucrative investment firm and holding company that focuses on residential, commercial and multi-family real estate properties. Micah and her husband rely on the knowledge and experience that they have gained from their years in the industry to focus on expanding their business portfolio.

In addition to their business, they also coach other agents and investors and share their tactics and their philosophy to "Embrace your F.E.A.R." and maximize your wealth building financial freedom. They offer a captivating eight-week program that offers strategies to agents and investors and those that want to take their business to the next level. The program provides participants with the tools that they need to successfully expand their net worth. Micah explains that their business is almost completely referral based and adds, "We look

to build long term business relationships as opposed to just transactions. I truly treat my clients as friend and family, and I care about what they need." She explains that one of her biggest goals is to help other agents succeed and increase their production.

Micah is not only focused on advancing her business and career, but also her personal self. She is an advocate of personal, self-development and attends seminars on a regular basis. She has been married to her husband for twelve years and has two sons, ages 7 and 10. She and her husband are also proud to provide the same guidance and mentoring to her children that they provide to their agents, "We teach them tactics that they don't teach in school – how to own your own life and work to own your own business." As a result, her 10-year-old son is becoming certified as one of the youngest John Maxwell coaches and he also has his own website, [thekidshark.com](http://thekidshark.com), where he posts inspirational videos and advice. He even walked on fire this year at a Tony Robbins event.

In addition to her professional accomplishments, Micah and her husband are dedicated to giving back to the community and have organized several charitable events. Committed to helping their family, their agents and the community as a whole, Micah and her husband are working on several books, attending industry conferences, and planning numerous speaking engagements to guide people who really want to grow and create a life around their business.

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# Robert Scaccia & Joe Salemi

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## “The Island Team”

“We have a great network of professionals that we rely on for just about everything, which makes our transactions and the business run smoothly.”



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### CONTACT:

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the daily operations of the business including office management and business generation. Joe also concentrates on business generation and is a hands-on traditional marketing expert who handles advertising, marketing listings and the digital and online marketing efforts for the business.

With over 12 years of experience, Joe was the office team leader for the past three years and recently transitioned back into the role of real estate agent. Together, Joe and Robert formed an elite team at Keller Williams so they could offer a collaboration of the best service to their clients. They have a strong foundation and rely on a focused group of professionals that they work with including attorneys, financial experts, insurance agents and lenders.

Both Robert and Joe attribute the success of their branch to a great team of knowledgeable people who are responsible, driven and focused on getting results for their clients. “We don’t do anything particularly different; we just do everything well. We are extremely efficient and have a good system that gets results. Being efficient and on top of things is a niche in itself.”

Their branch has 135 agents and Robert explains that they all truly work as a team. Keller Williams is very focused on training when they are on boarding new agents. The company is a great landing spot for anyone who is thinking of beginning a career in real estate. “We try our best to create a very comfortable environment for our employees, especially new agents. We are a team and a family and we all help and care about each other. It’s an all hands-on deck mentality.” Both Robert and Joe are licensed real estate agents that offer knowledge, experience and personalized service to all of their customers.

Together, **Robert Scaccia** and **Joe Salemi** lead a team of dedicated and experienced real estate professionals at Keller Williams Realty in Massapequa Park, New York.

Keller Williams is one of the world’s largest real estate franchises with over 1,000 offices and 180,000 associates across the globe. It is the top franchise in the United States, based on units and sales volume.

Robert and Joe work together as a team that produces results for their clients. Based in Massapequa Park, they serve clients throughout Long Island and Queens. Robert explains, “We collaborate and work extremely well together, we have a system that gets results.” They each bring a different skill set to the table, which helps them to meet the diverse needs of their clientele.

Robert transitioned into the real estate industry just over a year ago. As co-team lead along with Joe, he oversees the buyer specialists and

# BRANDON S. SHERIFF

Affiliate Broker, Realty One Group Music City

Brandon Sheriff has always believed that the key to being successful in real estate is delivering the most value to his clients.

“There are thousands of real estate agents in the Greater Nashville market. Having the ability to provide a more valuable and multi-faceted service to your clients is how you stand out.” As a seasoned real estate agent, certified residential appraiser, and real estate investor, Brandon offers a unique perspective and in-depth understanding of various aspects of the real estate industry.

After graduating *summa cum laude* in economics and finance from the University of Kentucky and completing his MBA, Brandon began his real estate career in 2006 as an appraiser. “My thought process was to start with learning how to value real estate and go from there.” After gaining knowledge and experience in the industry, he founded Sloan Real Estate Services PLLC in 2012, which continues to serve the Middle Tennessee market.

In 2009, Brandon became a licensed real estate agent. In this role, he began connecting with his clients and explains, “What I enjoy most are the relationships that I build with my clients during the process and the joy it brings them when they fulfill their real estate dreams.”

As an affiliate broker with Realty One Group Music City, Brandon specializes in residential real estate, helping clients buy and sell single-family homes, condos, multi-family investment properties, etc. Over the years, he has worked with individuals, families, investors, and companies.

Brandon remains focused on both sides of the industry and handles them as separate entities. He is also a real estate investor and has invested in properties in both Tennessee and Kentucky. Brandon attributes his success to his well-rounded knowledge and sums it up by saying, “I truly believe that having expertise in different aspects of the industry provides a vantage point that’s more beneficial to my clients.”

In addition to his professional life, Brandon enjoys spending time with his wife Rachel, children, William and Frances, other family and friends, playing golf, all UK sports, Titans football, and Predators hockey.

Brandon summarizes his commitment to his clients explaining, “The real estate success of my past and current clients is most important. When my clients work with me, I think it’s obvious how much I care and that won’t ever change.”



**“What I enjoy most are the relationships that I build with my clients during the process and the joy it brings them when they fulfill their real estate dreams.”**

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If you are interested in potentially partnering with KeyCity Capital, reach out to them; email and contact information is below.



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## TIE LASATER

### Building A Legacy With KeyCity Capital

As a serial entrepreneur and real estate investor, Tie Lasater has amassed an impressive amount of accomplishments during his ten years in the industry. What began with completing numerous fix-and-flip projects quickly developed into a diverse real estate portfolio in the multi-millions. In addition to holding the title of managing partner at KeyCity Capital, LLC in Southlake, Texas, Tie holds real estate across the nation and has conducted business in seven other countries. Recently, Tie even shared the stage speaking about real estate and entrepreneurship with well-known philanthropists and business coaches Tony Robbins, Grant Cardone, Russell Brunson, Dean Graziosi, and JT Foxx. However, Tie is already accustomed to doing business with celebrities. In fact, George Ross, a multi-million-dollar real estate investor and former celebrity judge on *The Apprentice*, recently commented that “Tie Lasater and KeyCity Capital team are the people you want to be investing with and doing business with.”

Another real estate investor who is a supporter of Tie and KeyCity is Robert Van Winkle, also known as Vanilla Ice, from *The Vanilla Ice*

*Project*. He declared, “Tie Lasater is hands down, one of the best entrepreneurs and business owners that I’ve met and done business with.” Those types of endorsements are invaluable and would be envied by any enterpriser.

KeyCity Capital, LLC was founded two years ago when Tie and his three business partners, Boone Lasater, Mack Garrett, and Leigh Archer, committed to starting a business together. Tie explains, “Our partnership began after years of sacrifice by each of us where we didn’t seem to be gaining any progress.” The partners agreed upon a list of priorities, and in order of importance, they listed faith, family, business, fitness, and personal fun. Then, they set out by relinquishing the first six months of property deals, keeping no pay for themselves, in order to build a foundation for their company. The partners then built out a management company, construction company, and turnkey property services company around their real estate holdings company.

This year, KeyCity Capital was inducted into Robert Kiyosaki’s, *Rich Dad Elite Legacy’s Hall of Fame*, for its success in real estate. In the last two years, they have done over 250 real estate transactions and have built a \$20M portfolio. They are actively acquiring 35 to 40 properties per month, continuing to add to their portfolio, as well as working with building portfolio’s with their investor partners.

KeyCity Capital is fueled by the motto ‘Driven by Your Legacy.’ By yourself, you can run fast for a period but it takes a team to run an organization. Tie and his partners created KeyCity Capital to not just leave an impact, but leave a legacy. It is *For Your Legacy* that they do what they do. Together with their valued investors, they are leaving a legacy for their investors, their families, and everyone they have the opportunity to work with. They work with very select investors and partners, who fit the culture they are building, and have already raised \$17M in capital in the last 2 years. Tie and his partners currently work with 45 investors and maintain an exclusive relationship with them, in order to maximize the clients’ experience and to operate in the most efficient way possible. To provide the highest return on investment for their clients, they base their business upon three C’s: Clear about the message | Certain about the process | Courage to take action every day.

Although their company quickly achieved success, Tie makes it clear that it didn’t happen easily or overnight “Well,” he says, “It was overnight...3,650 of them.” He explains, “Opportunity doesn’t come from luck. Success doesn’t just happen. Both are the by-product of sacrifice, hard work, determination, consistency, and purpose.” When he attends speaking engagements, Tie always emphasizes to attendants that every day is not going to be a great day. He says something he learned from his business coach, “You only need 50 good days a year to have a multimillion-dollar business, so celebrate those good days, and quickly move on from the rest. One of the keys to prosperity is the ability to keep moving forward, instead of dwelling on the past.”

# Dillon Checkal

## Founder & CEO, Checkal RED, Inc.

As the founder and owner of Checkal Real Estate and Development, Inc., Dillon Checkal relies on his focused education, professional experience, and his long family history in the real estate industry to run a successful real estate business.

Checkal Real Estate and Development is a boutique real estate brokerage based in San Diego, California, that offers extremely personalized and knowledgeable service to buyers, sellers, and investors throughout southern California. Established in 2016, the company is a collaborative family effort. In addition to a team of experienced agents, Dillon works alongside his mother, Michelle, who has 25 years of industry experience, his sister, who handles all of the social media and he also partners with his father's construction firm to offer clients referrals for contractors or any other building related needs.

Dillon graduated with a bachelor's degree from the University of San Diego, where he double majored in real estate and marketing. After graduating from college, he interned for the San Diego Padres, doing statistical analysis, but he knew that he wanted to change his career focus. He worked as a project manager for Checkal Construction, his father's construction business and then got his broker license and began focusing more of his attention on real estate. Building on his own aspirations and his family's years of experience in the industry, he founded his own firm, Checkal Real Estate and Development. In their first year of business, the firm sold about \$7 million in real estate and three years later, they have almost doubled that figure, doing about \$13.5 million in sales. The team at Checkal Real Estate builds strong relationships with their clients and offers valuable knowledge of the real estate industry in the San Diego area.



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In addition to his professional accomplishments, Dillon is very involved with his community. He sponsors the local little league team he grew up playing for and has recently become involved with the Hope Sports organization, which focuses on helping athletes reach peak performance by reestablishing their identity as individuals.

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As an experienced real estate broker, commercial property manager, and founder of a non-profit organization, Tywan Anthony uses his keen knowledge of the area and the real estate industry to serve his clients in his home town of Bedford Stuyvesant, Brooklyn, NY and beyond. Born and raised in Bed-Stuy, Tywan is deeply involved both professionally and personally with his community.

Tywan has worked in real estate for the past seven years. As a New York licensed associate real estate broker with Compass, Tywan works with both residential and commercial clients throughout Brooklyn and the Greater New York City area. Serving the needs of his clients, Tywan has assisted them in selling, buying, investing, and renting highly sought-after Brownstones, condos, and co-ops in the most desired areas. In addition to brokerage work, Tywan has personally invested in single family homes in value-add markets in the Midwest, with his preference being states such as Kansas and Missouri. He is a long-standing member of Community Board 3, covering Bedford Stuyvesant, where he is currently the chairman of economic development, overseeing small business development and growth throughout the area.

Tywan is also currently a commercial property manager for Retail Properties of America (RPAI), a company that owns and operates retail, office, and shopping centers throughout the United States. He currently manages ten properties located throughout the Northeast, which includes large national retail tenants like Lowes, Home Depot, and Best Buy.

Coupling community work with real estate, Tywan serves as an adjunct professor in the real estate departments of Baruch and Medgar Evers colleges, where he teaches various real estate courses to undergrad, graduate, and continuing education students.

Five years ago, he merged his love of football and community with a philanthropic cause and founded a nonprofit called the New York Crusaders, an organization that encourages fitness and health through the sport of football in under-served communities throughout New York City. The Crusaders have hosted many community events for the youth of New York City, including physical fitness, back-to-school events, local combines for high school kids, and have partnered with high schools, elementary schools, and colleges to bring a unique fitness experience to communities in need. Through its adult football program, the organization successfully sends under-served and overlooked athletes to various colleges throughout the United States every year, who otherwise would not receive such opportunities.

Tywan holds various real estate related certifications and designations and is a member of the Institute for Real Estate Management (IREM). He graduated from Pittsburg State University, where he was a member of the football program playing outside linebacker. After college, Tywan enjoyed a short professional football career playing on an area team and other professional organizations.



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## **CRAIG BERGER, CFA CPA**

Founder & CEO, Avid Realty Partners

After spending more than a decade on Wall Street, Craig Berger was searching for a more positive and meaningful way to contribute his skills, talents, and experience to the world. In 2015, his journey brought him full time to the world of real estate and today, Craig is the founder and CEO of Avid Realty Partners, a successful commercial real estate investment firm.

Avid Realty Partners is focused on acquiring and improving multifamily apartment properties in targeted growth markets like Texas and Florida. They have also owned some hotel and net lease assets. Typically, they acquire existing, value-add properties, though occasionally pursue new development opportunities.

As founder and CEO, Craig leads an experienced and skilled team that identifies and sources new projects. Responsibilities include underwriting and analysis of these assets, performing all due diligence on potential properties, arranging debt and equity finance, overseeing the renovations, and managing or asset managing. Ultimately, the team oversees the overall financial performance, related taxes, compliance, and investor relations activities. Through the firm's hard work, Avid Realty Partners typically delivers robust investment returns, averaging 14-18% annually over length of the project, and creates improved quality

of life metrics for their on-property customers and tenants.

Under Craig's direction, Avid Realty Partners has been steadily growing their real estate portfolio for the past five years. Craig explains that in addition to strong investment returns, the real estate business allows him to offer great things for his customers and tenants. "We are able to acquire a property and improve it. We renovate interiors and upgrade apartments to create better homes for people and we also add amenities like pool cabanas, state-of-the-art fitness centers, or a new dog park. As a result, we bring the community and tenants together." Craig adds, "We are not solely focused on high end apartments, we focus on working-class people like teachers, police officers, retail workers, restaurant workers; people who simply want to live comfortably and affordably."

Prior to his career in real estate, Craig spent over ten years as a top equity research analyst and a managing director for FBR Capital Markets and Smith Barney Citigroup. He also gained operational, strategic, and management experience working at Intel Corp., in their corporate finance group, and as a tech startup consultant and financial advisor for THIRSTIE.com. Craig earned a master's degree in accounting and finance from the University of Texas at Austin.



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## STEVEN AND JESSICA POULOS

BROKERS | REALTORS | OWNERS

### Northwest Home Team Realty

As a married couple with five children, Steven and Jessica Poulos understand the importance of home and family. Therefore, when they founded Northwest Home Team Realty in 2017, they agreed that their principle mission would be to serve others. So, instead of asking how many houses they could sell, the duo set out asking how many families they could serve. It is this the unique outlook that sets Northwest Home Team Realty apart from all the other real estate companies in the industry.

Although Steve and Jessica are both owners and work together on all projects, each of them has a specialized role in the business. For instance, with over sixteen years of real estate experience, Jessica serves as the designated broker. Her responsibilities include reviewing contracts, supervising employee training, and managing daily operations. Most importantly, Jessica acknowledges that real estate is usually a person's largest investment. Therefore, she strives to personally invest in her clients in order to help ensure financial return for them and to make their dreams of home ownership come true.

Before becoming a realtor in 2006, Steve spent fourteen years working in the construction industry. Therefore, he serves as head of the construction division- the largest part of the business. He oversees planning, marketing and building every home and neighborhood represented by the company. Still, he is not concerned with how many they can build or sell. Steve says that his "main goal is to build high quality homes and to develop well-laid out and beautiful neighborhoods to improve the community." Unlike many other developers, he is not interested in "cookie cutter" housing, which has earned him much appreciation from clients and communities.

Due to Steve and Jessica's hard work and dedication, in only two years, Northwest Home Team Realty has grown considerably. What began as four sales brokers and one administrator has evolved into an impressive company with twenty-one agents and three staff members. In addition to an increase in agents, they have been generating approximately 450 new customers per month. They also get a lot of repeat business because their agents are professional, well-trained, and always put their clients first.

In fact, Steve and Jessica say that their agents are what really separates them from other real estate companies. Unlike traditional brokerages, Northwest Home Team Realty dedicates a great deal of time to training their brokers. They coach them on how to sell a home, how to assist buyers, and how to market their properties. Training is specific, and once completed, the agent will receive a book full of business from the company. Therefore, lots of agents are now coming to Northwest Home Team Realty. They have a desire to understand real estate and how business works, and they know they will have clients to work with once they complete the requirements.

Just as they believe in the importance of family, Northwest Home Team Realty also believes in supporting the community. Therefore, each agent donates a portion of his or her commission to a community fund. Last year, they raised over \$4,000 for *Homes for Heroes* and have already surpassed that amount this year. Part of their team's philosophy is to show integrity by doing "the right thing." Steve and Jessica's commitment to their clients and to their community shows their determination to practice and to uphold this philosophy.



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# STEVE HITTMAN

CEO, Crossroad Companies, LLC

According to NJ Biz, Crossroads Companies LLC is one of New Jersey's top commercial real estate developers. Starting out as a small one-person office, Steve Hittman has created with investors a portfolio of supermarket-anchored properties valued in excess of \$200 million. His team of entrepreneurs and managers have expertise in commercial and residential development, as well as construction, finance, property management and commercial lease transactions. They represent some of New Jersey's most successful retailers and largest property owners. Top 100 Magazine interviewed Crossroads' founder and CEO, Steve Hittman, this past month and posed the question, how did his firm evolved to become one of New Jersey's most successful real estate firms?

Steve relates that "all entrepreneurs start out with ambition which is subsequently honed by experience and the accumulation of skill sets. We endure setbacks from time to time, however our tenacious nature allows us to learn from our mistakes. A persistent goal and a plan adjusted to reflect new or changing circumstances often lead to success".

As a first-generation real estate developer, Steve indicated fate intervened early when by chance he was thrown into the competitive world of NYC real estate right after college. Working in a "dog-eat-dog" environment, he learned to work on a straight commission while navigating the complexities of lease, sale and mortgage transactions. It required patience and tenacity, as well as Spartan discipline. All the above prepared him for his next challenge - a highly-leveraged supermarket chain retained Steve to assist third-party developers to finance the chain's real estate projects. The assignment led Steve and the supermarket chain to undertake self-development, as well as sale-leaseback and joint venture projects. The challenge of financing real estate in a severe recession with leveraged credit, as well as securing multiple projects with capital constraints, laid the foundation for subsequent development opportunities.

Steve established Crossroads in 2001 when several supermarket clients retained his services to represent them in an advisory capacity. Advisory fees afforded Steve the opportunity to also pursue development opportunities. Shortly thereafter, Steve placed a \$10,000 wager (refundable deposit) on an unimproved parcel subject to approvals. He believed the location was ideally suited for a supermarket tenant. His efforts resulted in his first successful project, a \$16 million ShopRite center in Somerset, NJ.

Over the past decade, Crossroads has constructed over \$200 million of supermarket-anchored projects, with new projects slated for Wayne, Fair Lawn, Elmwood Park & Jersey City. In addition, Crossroads has multi-family residential projects pending in northern NJ which, upon



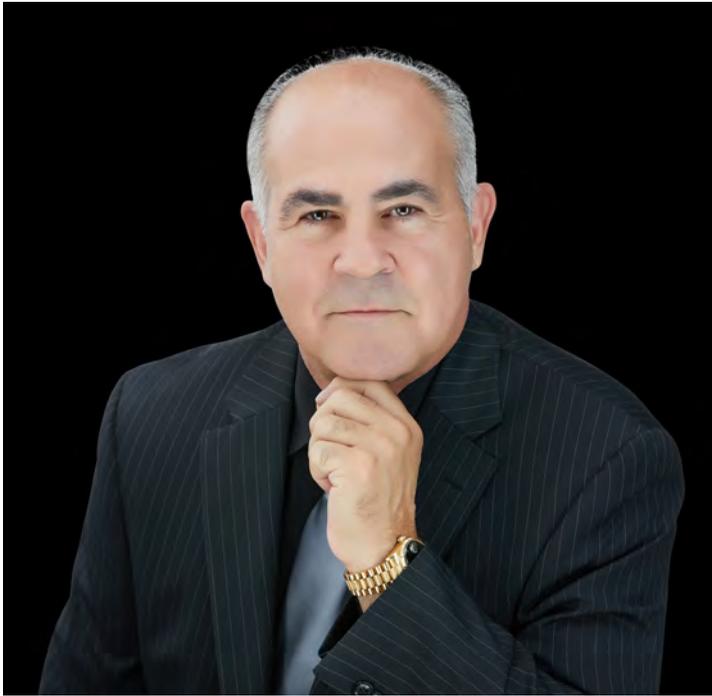
completion, would create a multi-family portfolio in excess of 300 residential apartments.

If you asked Steve the formula of his success, he would say that "in large part our success has derived from our solid relationships with retail clients, property owners, peers and employees. We believe in collaborative relationships, as our clients rely on our ability to perform often under difficult and competitive circumstances. When the client comes first, success inevitably follows".

Steve is a graduate of the State University of Potsdam. He received his diploma in real estate development from New York University.



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## GLEN GALLUCCI

Mr. Private Lender

*“From Contractor to Investor to Being the Bank”*

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Glen Gallucci is the CEO and founder of Peak Properties and Peak Private Lending. With over 30 years of experience, Glen is an expert at analyzing, buying, fixing, and selling houses. He is one of today’s most well-financed and well-respected real estate investors, and he has been recognized as NJ’s premier direct private lender to real estate investors since 1998, earning him the title of “Mr. Private Lender.” Glen has been featured as the *New York Times*® pick for touring his investment properties.

Glen has closed over \$100M in residential and commercial real estate, and he has delivered double-digit returns, near impossible to find on Wall Street, for his select private investors via his real estate investing companies, Peak Properties and Peak Private Lending.

In 1998, he set up Peak Properties, LLC, a real estate investing company. He was a pioneer of the flipping houses trend. Glen, along with his son, Paul, who is the managing partner of the Peak Organization, built up a reputation for successfully buying, renovating, and selling distressed and bank-owned properties. This “in the trenches” experience led Glen to a realization that there was a segment of the market being ignored. With a heart to serve the needs of everyday real estate buyers and sellers, Glen began his foray into lending by providing personal funds to real estate investors who didn’t qualify with banks or hard money lenders. The flexible programs he developed opened doors that gave traditionally unqualified investors access to the industry. His unique lending programs quickly attracted the attention of experienced and seasoned investors as well. His unrelenting focus and drive led to tens of millions in private funds being pumped into the real estate market greatly benefiting both borrowers and investors.

Glen explains that “as investors ourselves, we offer flexible lending programs, and we are not a traditional lender looking at your credit, bank statements or personal financials. We are strictly asset-based lenders and look at each project on an individual basis. We are direct lenders and don’t sell off our loans to third parties. We keep and service the loans in house, which means we are the only approval you will need. We lend money when banks and hard money lenders can’t or won’t.”

Glen’s business and reputation as both investor and as “Mr. Private Lender” has skyrocketed over the last decade. Glen is sought after as a speaker and educator for his expertise in short-term real estate investing and private lending. Glen has been a featured and keynote speaker at numerous lectures throughout the tristate area. He conducts various seminars and workshops that offer elite training and in-depth real estate investment education to beginning and experienced investors.

Glen and Paul also operate Peak Capital Investments LP, an investment company that offers real estate backed investment opportunities, providing predictable returns with less uncertainty than market-based investing. In addition to offering investment opportunities, Glen periodically offers accredited investors the opportunity to join his 22-year, highly successful investment program.





# INVESTCOR

As a partner with Investcor, Colin Kilgore uses the comprehensive knowledge and experience that he gained working at several renowned consulting and investment firms to oversee the firm's financial analysis, asset management and capital relationships.

Investcor is a successful real estate development company based Austin, Texas. Founded in 2008, the business is dedicated to developing industry leading real estate projects in high growth markets. They focus on recession resilient, need based real estate investments. The business has been steadily growing and has completed over \$675 million worth of transactions since its inception.

Colin manages the financial aspects of the business and is responsible for feasibility analysis, asset management, accounting, project underwriting, and building capital relationships. As a partner with the firm, Colin has been an integral part of the company's success and explains how their unique business model and way they identify and evaluate projects, has supported growth:

"There is extensive demographic and economic shifts that are quickly transforming America. Going beyond simple headlines, we use detailed frameworks and tools to delve deeply into demographic data. We use these analytics to identify attractive areas of investment."

The team at Investcor focuses on the senior housing market and developing affordable housing for under-served senior communities. Colin adds, "In the past four years, we have been able to enter markets with exceptional supply-demand fundamentals. The company's unique prototype has enabled us to deliver new products in markets that have not received new inventory in 20 years."

Prior to his role with Investcor, Colin served as the director of Capital Markets at Aspen Heights Partners, where he was responsible for sourcing, structuring and negotiating capital relationships. There, he successfully closed over \$725M in debt and equity financing. He also worked as an associate at Behringer Harvard, where he led analytical efforts in the valuation of \$1.5 billion in mid-stream multifamily development as part of a public REIT valuation and listing. He began his career in finance as a consultant for Ernst & Young, LP, where he served clients in the financial services industry.

Colin received a Bachelor of Science degree in finance from Brigham Young University. In 2015, he was selected as an *Emerging Leader in Multifamily* by *Real Estate Forum Magazine*.



## COLIN KILGORE

Partner at Investcor Capital

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### About Investcor:

*Investcor is a privately owned real estate development company located in Austin, Texas, which is dedicated to developing industry leading real estate projects in high growth markets. Founded in 2008, Investcor has since successfully developed 15 projects with a cumulative value of over \$654M.*

*We attribute our success to our strict core investment principles:*

- 1) Developing projects based on underlying value, and not speculation*
- 2) Developing conservatively with a margin of safety to mitigate risk during market downturns or unexpected circumstances*
- 3) Strict and meticulous underwriting to ensure accurate expectations*
- 4) Clear, consistent and transparent communication*



## CHRIS BURHANS

Senior Vice President | Chief Information Officer



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ATG GO app: [attorney.atgf.com/go](https://attorney.atgf.com/go)

Chris Burhans has spent the majority of his career developing new technology for the real estate industry. Currently serving as the chief information officer at Attorneys' Title Guaranty Fund, Inc. (ATG), his latest project is ATG GO, a collaborative order platform created to mobilize real estate attorneys.

"ATG GO was designed to provide real estate attorneys with the modern-day technology they need to efficiently conduct business and thrive in today's market," said Burhans. "It's the first of its kind, we see it as a game-changer."

Fueled by a passion for technology and a gift for problem-solving from an early age, Chris pursued a bachelor's degree in computer network administration from St. Ambrose University in 2002, where he also played varsity football. He went on to achieve a Master of Science degree in cybersecurity from DePaul University in Chicago, and earned several industry specific certifications including, Certified Information Systems Security Professional (CISSP) and Certified Ethical Hacker (CEH).

Over the last 15 years, Chris has held multiple leadership positions in the information technology field, gaining extensive experience in consulting, security, emerging technologies, enterprise sales solutions, and more. One of the highlights was the year he spent traveling the country hacking into banks while providing cybersecurity consulting for the financial services industry. Those who know Chris know that his relentless nature and quest for solutions makes him ideally suited for this type of work. He also built a suite of insurance technologies focused on driving innovation, some of these applications are still the most widely used across the country.

Chris's expertise in technology eventually led him to the real estate industry. Before joining ATG in 2017, he worked for one of the largest insurance companies in the world where his primary role was to investigate, develop, and deploy new, industry-specific technologies.

ATG hired Chris to oversee all areas of technology including support, development, and infrastructure. ATG is the originator of the attorney-agent model in Illinois and has a long successful history as a title insurance underwriter. Chris is now responsible for the strategic innovation of cutting-edge technology that will continue to keep ATG at the forefront of the title insurance industry.

A Chicago-area native, Chris is an avid Chicago sports fan. In the midst of his IT career in 2011, he founded Sports Mockery, Inc. Frustrated by having to scroll through multiple sports outlets to find stats and information on local teams, Chris was inspired to create a blog focused on interacting with fans. He designed it to leverage social media as its primary engagement tool. What began as a simple mission to make sports news more fun, eventually grew into a fan base of more than 250,000. Today, Sports Mockery entertains millions of readers every month.

Chris continues to build tools and provide cybersecurity education for the real estate industry. His recent public speaking engagements have covered topics ranging from the potential impact of blockchain technology to quantitative risk management.

The future is bright for Chris as ATG, its agents, and the industry await his next innovation. "My ultimate goal is to position ATG as a disruptive technology leader in the real estate market." Given what he's accomplished so far, he's well on his way.

# ANTHONY HAULCY

## THE DREAM HOME FINDER

Working with clients to buy and to sell homes is much more than a profession to Anthony Haulcy, a broker/associate for The Associates Realty Group in Anaheim, California. In fact, he says that he always knew his sole purpose in life would be to educate and to inspire others, especially members of the working class. Anthony takes his job seriously because he believes that creating knowledgeable consumers ultimately leads to a better world. Therefore, he strives to ensure that his clients are making well-informed, educated decisions built upon a solid foundation of trust and transparency.

The reason Anthony chose the real estate business is because he wanted to help make other people's dreams come true. He understands what it is like to struggle and to overcome adversity. Battling hunger, receiving the lowest level of education, and not having funds available to attend college were constant issues throughout his developmental years. Anthony explains, "Growing up in poverty made it hard to imagine anything different, even for the best of dreamers." His community offered few opportunities and lacked basic resources, mentorship, and guidance.

Unfortunately, even after Anthony managed to move away to begin a life of his own, he continued to face insurmountable obstacles. For instance, as young adults when he and his wife attempted to purchase their first home, they were informed that their loan was denied on the day of closing. Heartbroken at the news, his wife ran from the room. Anthony refers to this experience as "the defining day that would ultimately begin the shaping of [his] future." It was at that moment that Anthony felt a burning desire to make sure that him, his wife and no one else had to feel the disappointment he and his wife felt. On the day they were supposed to be celebrating their new home, they found themselves walking away devastated and empty handed, but over the past 27 years together would inevitably go on to purchase more than 23 homes of their own.

Due to his background and challenging life experiences, Anthony thinks of his clients as friends and family. He explains, "I am dedicated to providing an easy, efficient, and enjoyable experience for each of my clients, and I view what I do not as a job but as an act of love." Therefore, it is not surprising that lifelong relationships have always been key to Anthony's success with more than 50 percent of his business coming from the referrals of past and present clients. Anthony recognizes that he was fortunate to have beaten the odds. He hopes that by acting as their agent, investment coach, contractor, loan officer, and advisor, he can help his clients beat the odds and make their dreams come true as well.

With over 22 years in the industry, Anthony has earned numerous awards and designations. He began by being named *Rookie of the Year* during his first year as a realtor. Then, he went on to earn the title of *Top Agent* at Remax Integrity group for 11 consecutive years before opening his own firm. Anthony has also received the *Multi-Million Dollar Top 1% Producer Award*, the *5 Star Award*, and the *Elite 10 Best Agents in the State Award*.



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Tom Maoli considers himself a serial entrepreneur. As a successful real-estate developer, business owner, radio show host and philanthropist, there's not many stones left unturned in the admirable life of this New Jersey resident who follows the mantra, "Go big or go home".

Tom is the president and CEO of Celebrity Motor Cars, LLC a luxury automobile dealership group featuring Lexus, Mercedes Benz, Alfa Romeo, Maserati, and BMW dealerships located in New Jersey and New York. In addition to his successful automobile dealerships, Tom is also the president and CEO of Real Estate Opportunity Investments, LLC, a residential and commercial real estate development and investment firm.

He is also the founder and CEO of Joe Zone Coffee Company, an innovative business that combines coffee and sports. He also shares his elite experiences and offers business advice as host of the *Go Big or Go Home* radio show broadcast twice a month on *iHeartRadio*. Tom shares, "My radio show is for entrepreneurs who want to get out there and start their own businesses....they have ideas but they don't know how to launch them." The popular show focuses on real estate investments, making smart deals and entrepreneurship.

As a prosperous and highly successful figure in all the areas that he is involved in, Tom shares how it all began. He started working in the real estate business when he was in high school.

His father and grandfather were always involved in the industry and as he learned and gained more experience, he made smart decisions and took advantage of lucrative opportunities to make massive real estate purchases. From there his investment legacy began and he grew into a major commercial and residential real estate developer throughout the tristate area. His business history included ownership of a global logistics business with over 750 warehouses around the world. He sold the business before the economy crashed in 2008.

Tom's current business, Real Estate Opportunity Investments LLC, focuses on extremely lucrative commercial and residential investments, new developments and shopping centers. Today, he has several projects underway including the construction of a brand new 400 unit hotel, waterpark and activity center on the waterfront in Burlington, New Jersey as well as restoring and renovating The Abbey, a historic 1870's home and landmark. Tom also owns a management company, a subsidiary of Real Estate Opportunity Investments, which manages all of the properties.

In addition to all his business ventures, Tom is motivational speaker and holds speaking engagements throughout the country. He is a member of the Republican National Committee, has served on the board of directors for numerous financial institutions and universities, has been the recipient of many prestigious awards and has donated his expertise, time and thousands of dollars to community and philanthropic organizations.

# TIFFANY BARNES

Owner of Level Up Wealth Academy

**Before negotiating and closing any real estate deal, Tiffany Barnes asks herself three questions:**

- Is this a good deal for me?
- Is this a good deal for the other parties involved?
- Would I make the same deal for my own grandmother?

Tiffany has worked tirelessly to solely support herself since a very young age. She left an abusive home and was emancipated from her parents at only 15 years old. Throughout high school, she worked three jobs to pay rent and support herself, all while excelling in school and ultimately receiving a full scholarship to the University of Utah.

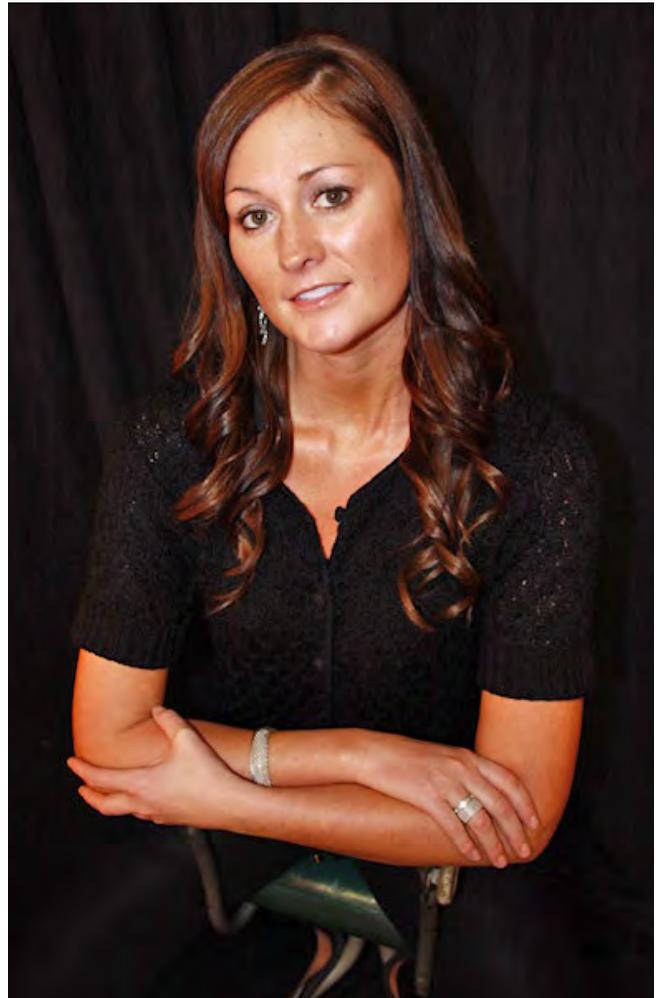
While working as a waitress during college, Tiffany encountered a regular customer who was a real estate investor. She was intrigued by his business and asked him to train her in the industry. She was unable to afford the expensive formal training courses that he offered, so they struck up a deal for her to work in his office for free in her spare time so she could learn the “ins and outs” of the real estate industry. Highly impressed with her work ethic, he ultimately guided her to making her first successful real estate deal. As she started to become more and more successful in the business, Tiffany left college to pursue a full-time career in real estate.

Despite her difficult upbringing, Tiffany excelled in real estate, becoming a millionaire at just 28 years old. She has traveled the country for the last 15 years, training thousands of investors, sharing her expertise on lease options, creative funding and financing, fixer-uppers and flips, as well as short term vacation rentals, including VRBO and Airbnb.

Tiffany overcame so many personal obstacles to get where she is today. She explains, “I still live below my means because I do not equate money with success.”

Armed with over sixteen years of experience in real estate and her ongoing passion for helping women break into a very male-dominated industry, Tiffany founded Level Up Wealth Academy. She had traveled extensively for years and knew that she wanted to be closer to home, so she set up in Salt Lake City with the mission to be a comprehensive, *BY investors FOR investors* educational forum. Now, through the Academy, Tiffany hosts classes and workshops, sharing her business experiences and providing guidance to professionals in the real estate industry.

In addition to her professional accomplishments, Tiffany is also the founder of a non-profit organization called SHARE (Sharing Hope for the Abused through Resilience and Empowerment), a charity that helps and empowers sexually abused women and youth.



As a successful real estate investor and consultant, a motivational speaker and the founder of a non-profit organization, Tiffany Barnes prides herself on always putting her ethics and morals first – in anything that she does.

**Tiffany Barnes, Owner of Level Up Wealth Academy**

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## KYLE BARRILLEAUX

Insta Real Estate Solutions

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As an experienced realtor and real estate investor, Kyle Barrilleaux knows the true “ins and outs” of the real estate industry. A licensed real estate agent for over five years, and a lifelong resident of the local area, Kyle expertly assists clients with buying and selling properties throughout the Tampa/Saint Petersburg area of Florida.

His comprehensive knowledge of the real estate industry has also benefited Kyle at his newest business venture, Insta Real Estate Solutions. Insta Real Estate Solutions is a hybrid, boutique brokerage that offers clients full representation and assistance with buying and selling properties, managing investment portfolios, coordinating renovations, property management and obtaining insurance, just to name a few services. They offer a full array of services or personalized, “ala carte” support, depending on the client’s individual needs.

Kyle joined the business in 2019 as only the third agent hired since inception and he explains that it is experiencing rapid growth, “As an experienced investor myself, I am very focused and strategic with numbers and pricing— which is a terrific advantage for my clients. And as a boutique brokerage, we can do things that larger brokerages are simply unable to do . . . we have the agility and the speed to get things done quickly.”

Kyle also runs KB's Properties Inc., a successful real estate

investment company that focuses on rental portfolios and rehabilitation projects. He specializes in waterfront homes in the Tampa and Saint Petersburg area and works with first time home buyers, VA/USDA/FHA programs, investment properties, either rental or fix-n-flip, and more. The business also has an in-house property management service and a portfolio of partner vendors and contractors, so they are able to offer reputable services and special pricing to their clients and business partners.

As an experienced investor who also works with investment clients, Kyle has an in-depth understanding of the market, more so than most realtors, because he has worked on both sides of the industry. He is constantly analyzing market trends and researching the data to find a lucrative investment opportunity, whether it is for himself or a client.

Kyle is an involved leader and mentor to his sales force, following the mantra, “teamwork makes the dream work.” With the business continuing to grow, he is always pursuing new talent to add to his sales team. There are currently several opportunities available and all positions include complete sales training, CRM and provided leads. The brokerage offers 100% commission less a small transaction fee and the sales team under Kyle can earn up to 90% on all leads provided by him. If you are interested in an exciting and successful career in real estate in the Tampa Bay area, contact Kyle directly.



# Jenny Ellul

Owner and Managing Director

**Jenny Ellul** specializes in the long-term success of her clients and investors by developing strategic solutions and partnerships that focus on growth and profitability. As a commensurate real estate professional, she has a strong background in real estate finance, capital management, and placement, syndication, joint ventures and asset arbitrage.

Jenny is the owner and managing director of Duke Capital Advisors, a commercial real estate firm that primarily focuses on commercial lending and investment strategies. The firm provides funding for real estate assets with in-house funds as well as bank, institutional, private and government programs to offer their clients the funding they need to purchase properties, including multi family, fix and flips, single family, retail, and more.

Duke Capital Advisors also specializes in joint venture equity for improved property and land development projects for investors who cannot readily access capital from traditional banking sources.

“ My company has the proven ability to structure simple and complex real estate transactions for real estate sponsors both at the fund level and at the individual asset level across the capital spectrum to minimize dilution and optimize the capital structure. ”

These solutions often involve a combination of debt and equity and the team at Duke Capital Advisors strategically targets a specific group of investors, either private or institutional, and organizes meetings that effectively maximize the sponsor’s time.

Jenny decided to build her business to better assist her clients and explains, “The biggest challenges that my clients had was finding inventory (property). We focused on obtaining these properties for our clients, which has resulted in terrific growth for the business.”



Jenny adds that they focus primarily on properties that are community initiative programs; community stabilization, mostly national not for profits. They pass these properties along to vetted investors, who then renovate the properties using local contractors, plumbers, and local workers. After the properties are rehabilitated, they are marketed to interested homeowners or renters with the goal of revitalizing the community and neighborhood, as Jenny has a true belief that “real estate is community.”

Jenny has over thirteen years of experience in lending and real estate, focusing the past six years on commercial financing and joint ventures. She is an expert at what she does and plans to continue to grow her business by offering key financial partnerships and rehabilitating properties throughout the Chicago area.

Jenny Ellul  
Owner and Managing Director at Duke Capital Advisors

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**Rudy Lira Kusuma** is the founder of Your Home Sold Guaranteed Realty, an innovative real estate agency based in California, and the only company that focuses on helping real estate agents to grow and develop their own *Millionaire Real Estate Sales Team*. Launched just this year, the company stands as a testament to one man’s mission to change the real estate industry by breaking out of what he saw as outdated industry norms and standards to better service both home buyers and sellers.

While Your Home Sold Guaranteed Realty only recently emerged, Rudy put the concept into action over 11 years ago in 2007, when, as a solo agent, he became frustrated with a status quo that seemed to him to limit both clients and agents. “I realized agents were spending most of their time chasing people,” Rudy explains. “I was spending 80% of my time cold calling, door knocking, and trying to talk to people, and only 20% of my time servicing clients. Then, as technology became more advanced and buyers could view listings online, I thought, what is the value of agents if we’re not available to actually show them homes?”

To solve this problem, Rudy came up with an alternative strategy that would allow him to reach prospective clients, who could then contact him directly, rather than him calling them. He launched *Cash Flow Game*, where buyers come in to play the game and at the end, he made an offer on their homes. The concept worked. By eliminating the time wasted in prospecting, Rudy was able to devote all of his time to his clients. Soon after, he used this concept to start his own team within RE/MAX; Team NuVision, and he and his agents quickly realized its success. To date, his team has helped sell over 5,000 homes, ranking for several years as the number one RE/MAX team in the entire state of California, and Rudy himself, is the recipient of scores of industry awards.

With clear evidence of demand, by both clients and agents, for his innovative approach, Rudy launched, Your Home Sold Guaranteed Realty. “The company started because there is a problem in real estate today, and I wanted to solve that problem,” states Rudy. The real estate office of the future, Your Home Sold Guaranteed Realty, has fulfilled this promise with a model that puts clients at the center of its business and fosters the success of its agents. Its customers benefit tremendously with agents who are focused solely on them and with access to *all* homes that meet their criteria, including those not listed online.



Your Home Sold Guaranteed Realty’s agents are also reaping the rewards. “There is no brokerage that really helps the agents. I launched this company with a focus on helping agents that were just like me so that they are positioned for success from day one,” Rudy explains. “We help them build teams and we encourage them to start their own teams. When they join a team, we book them face-to-face with buyers and listing appointments, as opposed to prospecting.”

The company’s literal moniker embodies Rudy’s core principle of putting clients first. “Everything is about the clients, everything,” Rudy shares. “I wanted the name to reflect our dedication to them: Your Home Sold Guaranteed—*Your* home.”



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Read what home buyers and sellers have to say about Rudy’s service: [www.zillow.com/profile/rudyilk/reviews](http://www.zillow.com/profile/rudyilk/reviews)

# COLLIN MCDOWELL

VP/Sales Manager, Garrett Realty Partners



Since starting in the real estate industry 11 years ago, Collin McDowell has become one of the most consistent, award-winning agents and created one of Coastal Virginia's best real estate sales teams. While serving as member for Forbes Real Estate Council, Collin juggled the roles of both the general sales manager and vice president for Garrett Realty Partners.

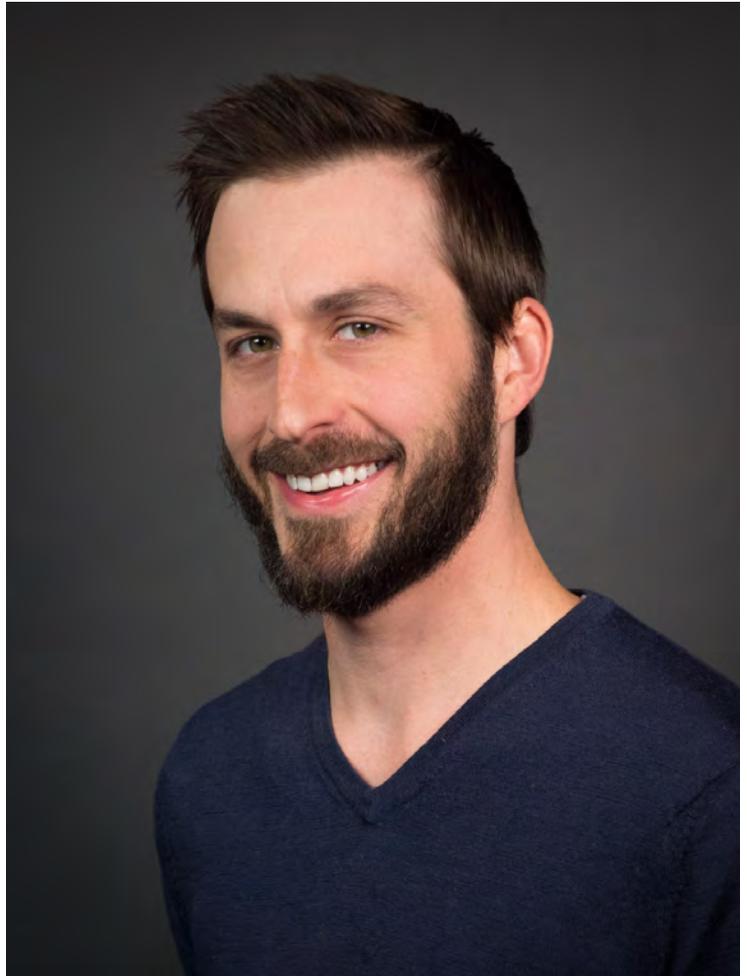
Continuing to break the status-quo, Collin trains, coaches, and sells, while never losing his passion for people and his true love for service. He takes pride in helping others succeed, regardless of their career field, and works with business owners and employees to assist them in the pursuit of their personal and professional goals.

Recently, Collin began creating motivational videos to encourage more people to follow their passions and find success. With an altruistic agenda to create a better community for all, Collin also speaks at local colleges and other academic events to share his experiences and strategies.

At the heart of Collin's personal and professional success is his wife, Nicole, and their two children, Madison and Ryker. As an active parent, he remains steadily involved in community programs such as the Angel Tree and Keith Ivey's *Youth Empowerment Program*. Despite his active schedule of work and philanthropic projects, Collin continues to search for more opportunities to make an impact locally, as well as nationally.

Collin's free time is spent in the company of family and friends. He also enjoys reading, writing, sports, and art. He comments, "People make the difference in my life, both professionally and personally. Each person has something unique to bring to the table and their differences shouldn't go unrecognized."

It is this philosophy that Collin injects into each and every client relationship. He adds, "Embracing the clients' individuality ensures that the home buying or selling process is less stressful and more fulfilling, ultimately resulting in the best results possible."



Read Collin's Feature Articles at:



[forbes.com/sites/forbesrealestatecouncil/people/collinmcdowell/#2c5466087ad8](https://forbes.com/sites/forbesrealestatecouncil/people/collinmcdowell/#2c5466087ad8)

To experience a true heart of service that is fun and unique, contact Collin McDowell today!



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*At Garrett Realty Partners, we are all about you: your experience, your happiness, and your future. We are a diverse group of individuals who work hard, laugh harder, and treat each other like family. When you work with us, you become a part of that family. For over 30 years, we've been the experts in Hampton Roads because of our knowledge of the area, the innovations we've made in the real estate industry, our passion for people, and the opportunities we provide to our clients and our agents.*



# SETH ESLAMI



## Contact Details:

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Seth Eslami takes pride in truly listening to the needs of his clients and providing top-notch service at a lower cost. He is adeptly skilled at creatively finding the most cost-efficient ways to get things done.

As the COO of Stellar International, a privately held commercial real estate company based in Houston, Texas, Seth was instrumental in the development of the company and currently manages operations while focusing on business growth. Stellar International Commercial Real Estate, LLC is managed by a diverse group of innovative individuals, who are committed to developing and implementing ideas and strategies in the commercial real estate market. Their comprehensive range of services includes commercial and residential property management, asset management and construction and project management. With a diverse background in property management, the team effectively evaluates “the way things have always been done” and provides a fresh approach towards ownership and tenant needs. Seth and his team are extremely focused on maintaining and improving assets through cost-effective measures to ensure tenant retention remains at the forefront of everything they do.

Seth is also the asset manager for 1225 North Loop Investments, Inc., a commercial office building where, in addition to managing the property, he oversees all leasing decisions. Seth explains that creativity is the key to getting things done the right way and adds, “I am very good at finding ways to make things happen. I do extensive research in order to find the most efficient and the most cost-effective way possible while maintaining the quality and level of service.”

Seth successfully managed the very first commercial office PACE (Property Assessed Clean Energy) project in the state of Texas. This was a \$1.3M project that provided carbon sequestration equivalent to 29,895 tree seedlings grown over ten years, or 1,359 acres of U.S. forests in one year at no additional cost to the owner!

Prior to his role at Stellar International, Seth worked in residential high-rise property for nine years, where he gained valuable experience and knowledge of HOA management strategies. As a result, his business today is one of the very few management companies that can successfully manage both commercial and residential properties.

Seth’s academic education in civil engineering provided him with a strong foundation and understanding of mathematics and the mechanical structure and aspects of a building. He has also lived in numerous countries around the world, which gives him a diverse and fresh perspective on positively dealing with all different types of people.

In addition to his professional accomplishments, Seth is involved with various organizations, including the Houston BOMA (Building Owners and Managers Association) Editorial Committee, the Community Association Institute and the High Rise Advisory Council. He is also a frequent panelist for many local environmental discussions in the Houston area.

Seth is especially focused on corporate responsibility and ethics. He incorporates several principles into his day-to-day activities, including:

Saving the Earth: “This should not be considered a nonprofit begging for donations and volunteers. Save energy, save money, and save the planet at the same time.”

Flexibility: “I listen to the owners and try to understand their concerns and needs, then develop a plan to fit those concerns and needs based on their budget and assets.”

Value: “I strongly believe in providing the best possible value. This doesn’t necessarily mean the lowest cost.

High Standards: “I have very high standards for myself and hold myself responsible for reaching them.”

# STACEY GLENN

Broker Associate, Team Leader

Stacey Glenn specializes in helping people who are looking to buy or sell real estate in Southwest Florida. Whether they are locals, 'transplants,' retirees, 'snowbirds,' or even 'aliens,' which is what people who are foreigners in real estate are affectionately called, Stacey gets the deal done!

Stacey is a *Top Producing Real Estate Agent* for Royal Shell and the host of *Realty-V* (real tv), a weekly series in which she shares her local market expertise, smart advice, and fun information about Southwest Florida, plus top tips for buyers and sellers along with other things you need to know if you're thinking about moving to the area. Stacey states, "You can join me each week as I share why YOU will love living in Southwest Florida. It's where I live and it's what I love."

Stacey's *YouTube* channel has hundreds of subscribers and a total of over 60,000 views. Be sure to check out her most-watched video, *10 Things you Need to Know Before Moving to Florida*, or *Etiquette for Snowbirds*, which is the most commented on.

What sets Stacey apart from other agents is that she excels at pricing and marketing her listings. She consistently beats the market to get her clients more money, in less time, with less stress, while prioritizing their lifestyle desires. From beach life and boating, to golfing, adult-only, kid-centric, or pet-friendly communities, Stacey finds the properties that will make her clients' lives the most enjoyable.



Stacey brands herself and her team at Royal Shell Real Estate with the Florida duck. The mallard is the symbol for her business and Stacey explains, "The Florida duck is a unique species that, unlike most ducks that migrate each year, spends its entire life in Florida." Its beautiful teal diamond-shaped feather is its trademark feature. Stacey came up with the branding strategy one day by chance as she was explaining how her job is to make the real estate process as easy as possible for her clients.... like how a duck, which appears to be gracefully gliding across the water, but underneath it's paddling like crazy. You can rest assured that Team Stacey is working hard behind the scenes to ensure that all home sales go smoothly.

Stacey is extremely talented at writing the most compelling

property descriptions that successfully capture interested buyers. Through her comprehensive property analyses and the level of service that she provides, she ensures that her clients will always receive the best ROI for their home, whether they are selling or renting.

Royal Shell Real Estate is a member of Leading Real Estate Companies of the World, has been in business for over 23 successful years, and has 13 offices throughout Southwest Florida and North Carolina. It is a boutique firm with highly experienced agents who offer first-class, personalized service. Stacey is a Florida licensed real estate broker, team leader, a Certified Negotiation Expert (CNE), and a graduate of the Realtor Institute (GRI).



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Justine Belson Photography

# ALEXIS MCGEE

PRESIDENT, BROKER



**ALEXIS MCGEE GROUP INC**  
BROKERAGE • INVEST • COACHING • DESIGN



“The few that do are the envy of the many who only watch.”  
-Jim Rohn

With a long and comprehensive history in real estate and investments, Alexis McGee is a successful business owner who taps into her 36 years of knowledge and experience to provide guidance and mentoring to her real estate agents.

As the president and head broker of the Alexis McGee Group, Inc., a boutique real estate brokerage based in California, Alexis specializes in residential and commercial real estate, with a focus on acquisitions and dispositions of both wholesale and retail real estate.

Alexis began her lucrative career in real estate after she graduated from Arizona State University with a B.S in finance and real estate in 1983. She worked as an investment property specialist for Grubb & Ellis Commercial Real Estate and was eventually promoted into the role of national director of REO Properties, a position that was created for her. At Grubb & Ellis, Alexis was the first woman investment real estate agent in the Sacramento region. She closed her first deal at the young age of 24; an exclusive listing for three multi-family projects with a total sale of \$13 million. As a result, Alexis was awarded *Rookie of the Year* for the firm. Alexis adds that she had to prove herself in what was a very male-dominated industry at the time. “I wasn’t successful because I was trying to be like the guys, I succeeded because I believed that I was just as talented, and there was enough business for everyone.”

After the *Tax Reform Act of 1986* and the housing market crash that followed, Alexis began investing in foreclosure homes to fix and sell for profit. In 1992, she left commercial real estate and co-founded Foreclosures.com, an internet-based business that specialized in foreclosure real estate information. As the co-owner of the business, she trained and coached thousands of investors and realtors on how to make profits through foreclosures, the right way. In 2006, she was interviewed and featured on a front-page *Wall Street Journal* article that focused on the investment opportunities in the foreclosure sector. Alexis explains that this article, entitled, *Slower Home Sales Open Up a Market For Some Investors*, changed her life and as a result, she became the author of two best-selling books and a nationally sought-after foreclosure expert.

After running Foreclosures.com for over twenty years, Alexis retired from the internet and seminar businesses in 2014 and went back to her roots of real estate investing. By 2017, she had launched her real estate brokerage, where she mentors her agents to help them successfully build their own real estate businesses. Alexis explains that she has built her business on more than just technology, but by creating lasting relationships and providing her clients value; skills that she passes on to her agents. She adds, “I built my business the old-fashioned way, by getting out and meeting people and actually caring enough to provide quality service to every client. My goal is to become their number one real estate resource.”

In addition to her professional accomplishments, Alexis continues to give back to the community by hosting local, monthly real estate meetups with the California Real Estate Investors: Alexis McGee Group.

Her two books, *Guide to Making Huge Profits Investing in Pre-Foreclosures Without Selling Your Soul* and *Guide to Advanced Investing Techniques You Won't Learn Anywhere Else*, are both available on Amazon.

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# MARCUS FRENCH

Assistant Vice President



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Marcus French, an Assistant Vice President with Jersey Mortgage Company, has dedicated the past twenty years of his professional career to the mortgage industry. He is respected by his peers as a leader and top producer for Jersey Mortgage Company and for the past 5 years, Marcus has been awarded to the President Club. Marcus credits part of his success to the experience he gained from his previous places of employment, starting at the age of sixteen in various customer service positions, which helped him gain the knowledge in sales to build a foundation of people skills, business sense, and basic economics.

Marcus graduated with a business management degree and a minor in sports management from New Jersey City University and attributes much of his success to being a life-long learner. He values the importance of education and continually attends business seminars and training sessions in order to better serve his clientele. It is this determination that inspired his motto of, "getting the challenging deals done!" The confidence that Marcus displays is a confidence that stems from knowing that anything is possible if a person is willing to put forth the time and effort to learn the fundamentals of their craft.

Starting as a loan officer in 1998, Marcus quickly began to take on more responsibility and to move up the ranks within the company quickly. Today, in addition to his responsibilities as Assistant Vice President, he is considered a producing manager. Although it may be uncommon for an AVP to personally manage every client, Marcus says that it is this amicable relationship that separates the "French Team" from all the other companies in the industry. As a small company, team members can offer higher quality assistance and follow-up services. This is evident in Marcus's phenomenal online reviews from both realtors and clients.

Jersey Mortgage was the perfect company for Marcus. Unlike other mortgage firms, all loans are completed in-house. Marcus expressed his love for Jersey Mortgage Company (JMC) during his interview; "We may be a small unit, but we are moreover, a tight knit family. JMC is a name you can really trust, internally as an employee, and externally as a client. With our company, we stress the importance of communication and follow-up, seeing every transaction through until the end with



all of our borrowers. We don't have third party fees or hidden costs associated with our transactions. What we do have is a deep history of honor and integrity. JMC has been established since 1938 and has maintained an impeccable reputation for their clients for decades."

In particular, Marcus enjoys working with veterans and first-time home buyers. Although he and the company deal with many different types of financing options, they specialize in jumbo and government loans such as a FHA, FHA 203K, and VA, just to name a few. Marcus and his team really enjoy working with families and being able to help them make their dreams of home ownership become a reality. JMC recognizes the value of established relationships and customer dedication.

Marcus and Jersey Mortgage have close ties with the community that they actively support and participate in; local charity organizations such as Jeremy's Heroes and Habitat for Humanity. In addition, Marcus was nominated in 2017 for *The Governor's Excellence Award for Housing and Development*, and Jersey Mortgage was ranked as one of the *Top Three Institutions in New Jersey for Providing Superior First Time Home Buyer Programs to Consumers* by the New Jersey Housing and Mortgage Finance Agency. Marcus and every other team member of Jersey Mortgage believes that "Integrity is doing the right thing when no one is looking." Their goal is to continue showing the same level of integrity for their customers that they have proudly maintained for over thirty years!

*Authored by Marcus French*



*Black Diamond Realty*

## DARYL B. HARRIS

OWNER/FOUNDER/BROKER

Daryl B. Harris has a true vision for Black Diamond Realty, the company he founded in January of 2019. As the owner and broker for this emerging business, Daryl's goal is to successfully revitalize and rejuvenate the Metro Detroit area.

Born and raised in Detroit, MI, and with over four years of experience in real estate, Daryl has a true passion to resurrect Detroit and bring it back to the bustling and prosperous city that it once was. As a local to the area, Daryl explains that he has an advantage over many other brokers and realtors because he knows the city from the "inside out."

The team at Black Diamond is focused on investors, who can purchase newly renovated properties or old, run-down homes or buildings, and have the capital to rebuild and turn the property around. In addition, the team also works with owner-occupants who are looking to revitalize the city of Detroit and the Metro Detroit area.

Daryl adds, "We deal with a lot of properties that the average person may be afraid to go to. There are many suburban agents who only come to Detroit to get the high value listings, but Black Diamond Realty is ready and willing to work in all areas of Detroit."

As a new company, Black Diamond may not have a big marketing budget like larger companies, but they rely on their knowledge of the area, the personal service they provide, and the relationships that they build with their clients to grow the business. The team at Black Diamond also has partnerships with contractors and subcontractors in every trade, to help with the building and construction for a revitalized property.

Black Diamond focuses on both residential and commercial properties. They have a specialized staff that works directly with first-time home buyers and owner occupants, as well as investors who may be interested in apartment complexes and multifamily housing within the commercial division.

Daryl adds that his team works very well together and the combination of their strengths, knowledge, efficiency, and personal connections is what sets them apart from other agencies.

**"AT BLACK DIAMOND REALTY, THE TEAM IS TRULY WORKING TOGETHER TO BUILD THE COMPANY TO BE THE BEST IT CAN BE, WHILE REVITALIZING THE CITY OF DETROIT."**



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# ANI PAULSON

Commercial Real Estate Agent

## Marcus & Millichap

Ani Paulson, an investment sales professional with Marcus & Millichap Real Estate Investment Services in Charleston, South Carolina, prides herself in both understanding and aligning with the goals of her clients. As an investor herself, Ani has the ability to identify with clients and to establish long-term relationships with them, which has been key to her success at the firm.

Ani specializes in the analysis and disposition of office, industrial, and retail properties with an emphasis on exclusive seller representation nationwide. The company's mission, as well as her own, is "to help clients create and preserve wealth by providing the best real estate investment sales, financing, research, and advisory services available."

One way that Ani endeavors to fulfill the company's mission is through her unwavering commitment to offer the highest level of customer service. In order to do so, she maintains direct involvement in every transaction and ensures superior underwriting services. Her clients are also granted access to the largest pool of qualified investors, both nationally and internationally, which creates maximum exposure for their properties as well as a competitive bidding environment.

As an additional means of carrying out the mission of the company's founders, George Marcus and William Millichap, Ani works to customize and personalize her services to meet the diverse needs of private investors, professionals, and institutions. By focusing only on investment sales and by working to build stronger advisory relationships, Ani and her team help clients achieve their real estate objectives and keep them informed of transactions and trends, both locally and nationally.

Ani provides clients with complimentary property evaluations to give them a better understanding of their property value as well as ways to improve their property's performance. These benefits are substantial because they may ultimately lead to increasing a client's net operating income. Ani will do whatever is required before listing a property to ensure the client is maximizing value and well positioned for a sale. For example, she recently sold Advance Auto Parts, a large national retail store. However, before putting it on the market, Ani helped her client to renegotiate the lease with the tenant. This increased the seller's property value by 30% before it was listed. Ani was also instrumental in assisting a high-net-worth client in San Diego by touring his 141,000sf property in South Carolina and identifying the tenant's improvement needs in renewing their lease extension. Using Ani's recommendation, the tenant, a Fortune 500, A credit-rated tenant, extended its lease for an additional 7 years, which increased the value of the property for the landlord by an estimated \$3MM.



A final benefit that Ani has to offer her clients is a culture of information sharing. In fact, one of the mottos at Marcus & Millichap states, "Together, we make markets and maximize value." The company has a long-standing policy of information sharing across its vast network of investment professionals in order to assure maximum exposure for each listing. Each professional specializes in a property type and has a database of local properties and owners, so clients are completely covered across the U.S. and Canada with every investment. This foundation of information sharing maximizes pricing for clients and gives Marcus & Millichap the largest inventory of any real estate firm in the industry.

Ani Paulson graduated from the College of Charleston with a bachelor's degree in science. She majored in international business and minored in global logistics and transportation. She has also earned a Global Scholar Certification, a Global Logistics and Transportation Certification, and has been named a Certified Global Business Professional. She is fluent in both Russian and Armenian.

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# George Valiotis

## CEO & Co-Founder of Pace Glass Recycling

As the founder and CEO of Pace Glass Recycling, George oversees plant management, collaborates with current and potential clients regarding the current and future demands of recycled glass, and also works closely with financiers and investors.

As the co-founder and CEO of Pace Glass Recycling, George Valiotis explains that while his business may be considered a small company, they have very big ambitions.

Pace Glass Recycling is a technologically advanced glass recycling company that was founded in 2013. They strictly follow a recover and recycle objective by recovering mixed glass commonly found in household waste, cleaning and processing it, and then selling it to companies to be further recycled and made into new products. The company has quickly become a pioneer in the glass recycling industry, servicing large publicly traded companies throughout the Northeast, including New York, New Jersey, Connecticut, Massachusetts, Vermont, and New Hampshire.

He also has an important role working with local cities and towns to initiate the transfer of glass from landfills and other waste areas to be recycled and entered back into the market to be used for new products.

George graduated from Northeastern University with a bachelor's degree in civil and environmental engineering and then went on to receive an MBA in financial management from Pace University. After graduating from college, George began working for his family's real estate firm, Alma Realty, as the head

of acquisitions and development. In that role, he successfully managed the acquisition of over one billion dollars' worth of distressed property and real estate in NY and NJ.

In 2013, one of the distressed properties that he acquired was an existing glass recycling facility in Jersey City. Under George's innovative planning and supervision, a new, state-of-the-art glass recycling facility was built on the site. Shortly thereafter, an additional site was purchased and built in Hanover, NJ, and the business has been in full operation since 2016. This successful project became George's full-time career and lifelong passion.

Today, there is an immense demand for recycled glass in the industrial market and a great need to properly dispose of recycled glass in United States. As a result, Pace Glass Recycling has grown exponentially. Under George's elite management and direction, this small startup went from operating in a small facility in Jersey City to one of the largest glass recycling companies in the nation.

George adds that Pace Glass Recycling has set an ambitious 10-year goal to become the leading glass recycling company in the world. They recently received a *Congressional Award* for recycling, which proves that they are on their way to meeting, if not exceeding, their goal.

# SYLVIA Weddington

As a successful broker, business owner, and entrepreneur, Sylvia explains what motivated her to start her own business,

The brokerage would take a large percentage of my profits. I wanted to be able to keep what I worked so hard for. I also saw clients paying more and more and I thought it was unfair. I wanted to change the way things were done.



**S**ylvia Weddington has always had a passion for real estate and is a lifetime member of the Multi-Million Dollar Club. It initially began as a hobby, after she had her two sons and attained her real estate license, but in time, she became a successful broker with a lucrative career.

As the CEO and owner of Weddington Realty, the business she founded in 2000, Sylvia offers knowledge, experience, and personalized service to all of her clients. While her business primarily focuses on the luxury market, her team assists a diverse range of clients with buying, selling, and investing in both residential and commercial properties. Weddington Realty is endorsed by the NBA Retired Players Association-Atlanta Chapter, Gilchrist Law Firms, NewAge Security Companies, Georgia Conservatory Safari Park, Atlanta Peach Movers, and Southern Crescent Physical Therapy, among others.

Weddington Realty is renown for their integrity, honesty, exemplary service, and confidentiality, and have established a stellar reputation in the real estate industry. Their corporate and international relocation services, complemented by a wide array of concierge amenities, helps clients to assimilate into their new homes and locations effortlessly.

Under Sylvia's expert guidance, Weddington Realty employs a diverse staff of professionals, many of whom are multilingual, which is an asset when dealing with international clients. Sylvia is also licensed in three states; Georgia, Florida, and Texas.

Sylvia also credits her mentor, Orlando Lynch, who is the president and CEO of Atlanta Peach Movers. She states, "Orlando willingly shares his professional knowledge and expertise and is always

available to answer questions relevant to business. He has a genuine interest and is gratified by helping others succeed. I appreciate his ongoing support and fostering of professional development."

In addition to her professional agenda, Sylvia is a hospital chaplain and has an advanced education in the field of theology. She received a master's degree in pastoral care in chaplaincy from the Georgia Association for Pastoral Care, a Master of Arts degree in divinity from Liberty School of Theology, a degree in biblical studies and human resources from Atlanta Christian College, and a degree in interior design from Penn Foster University. She is also a REBAC real estate designation instructor.

Sylvia maintains an active profile within her community. She is on the board of the Zoological Association with the George Conservatory Safari Park as well as a member of the Executive Leadership Volunteer Board for the American Heart Association.

Sylvia has been endorsed by Ella's Heart Foundation, a non-profit organization that she founded and named after her mother, who passed away suddenly from heart disease. She also supports Go Red for Women and The American Red Cross.

Sylvia is married to L. Damon Weddington, MD, a former lieutenant commander and physician for the U.S. Navy. The couple has two sons, Langston and Lawson, as well as two lovable pugs, Libra and Lazer. In her spare time, Sylvia enjoys gardening, dancing, bike-riding, long walks, and making people happy.

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## CHARLIE FITZGERALD

Chief Executive Officer  
REI Investor Funds, LLC



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\*Each Office is independently owned and operated.



# “IT’S UP TO US TO DELIVER THEIR DREAMS”

*-Charlie Fitzgerald*

As the CEO and founder of REI Investor Funds, LLC, Charlie Fitzgerald is dedicated to achieving the most positive outcomes for all of his clients. He works closely with all of his clients, offering personalized services and developing long-term, meaningful relationships.

With over twenty five years of experience in the real estate industry, Charlie is an expert in investment real estate in the areas of lending, passive income portfolio development and utilizing buying, renting, refinancing and real estate flipping methods to acquire, renovate and sell properties and programs. Since entering the residential lending sector over twenty years ago, Charlie has personally closed in excess of 1.5 billion dollars in conventional residential mortgages for clients across the country.

His firm, REI Investor Funds, LLC has deployed hundreds of millions of dollars of capital to the investment real estate industry for over 20 years. As the CEO, Charlie oversees all day-to-day operations of the business and manages the deployment of capital to residential and commercial real estate investors throughout the United States. His experienced team at REI Investor Funds also works with foreign investors who are interested in buying residential real estate investment properties in the U.S. Charlie explains that the team at REI looks at every opportunity to deploy capital, through the eyes of the borrower, so they can accurately determine whether or not the transaction is going to be a good experience for their client. This is especially important when working with investors and even more important for those that are not local to the area that they are investing in.

Charlie is the architect of the "White Glove - Full Service" platform that he and his team use to provide exemplary service to their passive residential and commercial real estate investor clients and he adds, "The mission of our team is to do everything we can to make the experience for our clients the very best possible - from the initial contact with an investor that needs capital, sourcing assets to acquire, funding that transaction, managing any necessary renovations, sourcing a tenant or, procuring a buyer. – All while delivering a hassle-free experience for our clients."

Prior to his successful career in real estate, Charlie held global executive management positions with two of the world's largest armored car companies as well as executive management roles in several privately held corporations. He has degrees in business management and legal support services and maintains active Real Estate Licenses in Kansas and Missouri.

Charlie has received numerous industry awards and has been recognized nationally as a real estate expert, speaking on the subject for over 20 years. He has also authored numerous articles and published white papers about numerous topics related to the real estate investment industry.

## THOMAS CULLEN

Thomas Cullen has been a part of the Southern New England real estate industry for over 30 years. Tom began his career at the age of 22 when he became the youngest appraisal officer in the history of Providence's Old Stone Bank. Through the years, Tom has held several significant positions at leading lending institutions in the Southern New England area. Today, as the founder and chief appraiser of Cullen Real Estate and Appraisal Company, Tom continues his successful career. Tom is a certified residential real estate appraiser in both Massachusetts and Rhode Island, as well as the broker of record for the company's selective real estate sales division. With more than 30 years of extensive real estate valuation experience, Tom is often consulted when the issue of determining the precise market value of a property is crucial. His appraisal experience is comprehensive, and he often deals with complex appraisals commissioned by governmental agencies, municipalities and corporations as well as assignments relating to legal matters such as divorce, foreclosures, tax abatement, estates or eminent domain. Additionally, the company also has a focus on real estate sales. Most of Cullen Real Estate's sales listings are generated through attorneys, accountants and other professionals that encounter complex situations where professional expertise and market knowledge is vital to a successful outcome. Tom has written many articles on procedures and methodology when handling complex appraisal assignments. Tom's expertise is often sought after by his industry peers from across the country for consultation or advice when handling complex, difficult or unique real estate appraisals. Tom is an affiliate member of the Appraisal Institute and is approved by the Federal Housing Administration and is a member of the Greater Providence Board of Realtors. Cullen Real Estate and Appraisal Company is accredited and holds an A+ rating with the Better Business Bureau. Tom was awarded *Best of Home Advisor 2019* for outstanding professionalism and customer service and has hundreds of individual 5-star reviews written and posted online by his clients.



Cullen Real Estate and Appraisal Company | [www.cullenrealestateandappraisal.com](http://www.cullenrealestateandappraisal.com) | [cullenre65@gmail.com](mailto:cullenre65@gmail.com)

Locations in Providence, Rhode Island and Boston, Massachusetts | O: (978) 315-0141 | (401) 919-7114 Jessica (Business Mgr.)

## SAVITRI RICHARDSON

Savitri Richardson is a licensed real estate broker and owner of Savitri Lela Richardson Real Estate LLC, a Brooklyn-based full service, boutique real estate brokerage. With 16 years of real estate experience, Savitri's expertise encompasses brokerage, investment, appraisals and development. Over the course of her career, Savitri has established a reputation among her clients and colleagues as a professional, dedicated to exceeding expectations with a proven track record for results. Savitri's love of New York real estate runs deep. Born in the Prospect Heights neighborhood of Brooklyn, NY, she was raised in a family of landlords and developers. Encouraged by her family's success, she embraced her passion for real estate at a young age. After earning her Bachelor of Arts degree from University of Virginia, Savitri purchased her first home at the age of 22. Soon thereafter, she obtained her real estate license and began a successful career as an investor and real estate agent. Launched in 2015, Savitri followed her innate entrepreneurial spirit to open her own boutique brokerage. Although she enjoyed a highly successful career at one of New York's top-rated real estate firms, Savitri felt there was a niche in the market for something different. Her vision was to capitalize on her years of experience in corporate real estate, coupled with her seasoned knowledge of each unique New York residential neighborhood, to offer clients the same full array of services and amenities as the big firms, but with a focused, highly personalized approach. Savitri Lela Richardson Real Estate LLC, specializes in the buying, selling, leasing, and marketing of residential properties in the Brooklyn, Manhattan, Queens, and Bronx areas. Savitri, along with her team of agents, pride themselves on (as Savitri puts it) "Brokering the Brooklyn way." As a full-service firm, they also have partnerships with vendors that provide moving, storage, photography, staging, decorating, and other services to ensure the entire process runs



**SAVITRI LELA RICHARDSON**  
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*"brokering the brooklyn way"*

smoothly for clients. In keeping with her commitment to deliver highly personalized service, Savitri works tirelessly to match her clients with exactly the right property, based on their preferences, goals, and values. Savitri has amassed an impressive network of clients and affiliates through her passion for helping people, and her devotion to providing outstanding, reliable services. As her firm continues to grow, this client-focused workmanship has paid off in the form of a stream of repeat and referral business. Savitri credits her success to hard work, persistence and the support of her family. [www.slr-realestate.com](http://www.slr-realestate.com) | [savitri@slr-realestate.com](mailto:savitri@slr-realestate.com)



## TRACY MARKS

As the president of LenderSelect Mortgage Group, Tracy Marks is an exceptional leader that focuses on building relationships, cultivating business growth and supporting and mentoring his experienced team of employees. In 2011, Tracy was approached by the leadership team at Atlantic Bay Mortgage Group to pioneer and launch a third-party origination platform for credit unions and community banks. With Tracy's strategic vision, execution and strategy, LenderSelect has experienced tremendous growth with nearly 150 community lending teammates throughout the country. Tracy focuses to be a servant leader to both his employees and business teammates. He explains, "I am providing a service to my customers and my employees to help borrowers achieve the American dream of homeownership. I strive to be attentive to the needs of clients but also to the LenderSelect team, which essentially makes them more passionate employees." LenderSelect Mortgage Group is a full-service mortgage provider committed to empowering community lenders with the necessary tools for growing a profitable mortgage platform. As a Fannie Mae, Freddie Mac, and Ginnie Mae approved lender, LenderSelect's collaborative approach offers community lenders the benefits of directly offering mortgages, without increased overhead costs or risk. LenderSelect offers a customized model that provides financial institutions maximum return on investment by increasing borrower retention, production, and profitability, while ensuring compliance oversight.



Through their unique model, they empower credit unions, community banks, and farm credit associations with access to the secondary market. Experiencing double-digit growth, LenderSelect is strategically focused on expanding into additional markets to enable more community lenders to leverage its services. Tracy adds, "We act as a consultant, a catalyst and a caretaker. When we sit with community financial institutions to talk about mortgages and how they are running their business, we really act as a consultant first and foremost. We listen to their needs and then strategize their best options." Tracy has over 20 years of experience in the finance and lending industries and previously owned a furniture business. He also worked with the government of Virginia, running a rehabilitative state agency that helped find employment for people with disabilities. Tracy adds that it was one of the most rewarding jobs that he ever had and it taught him empathy, humility, respect, and compassion.

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## JASPAUL KAPOOR

Jaspaul Kapoor is vice president of CBRE Capital Markets, the world's leading commercial real estate services firm, which offers real estate investment sales, leasing, financing, advisory and investment banking services. In his current role, Jaspaul covers the gamut of financing assignments, with a focus on apartments and government agency lending programs. Over the course of his career, he has participated in over \$5B of real estate transactions.

Jaspaul joined the Debt & Structured Finance group at CBRE in 2017 and brought with him valuable experience and specialized expertise gained during his previous tenures at ARA Newmark, CBRE and Arch Bay Capital, where he held roles in the areas of capital markets, investment sales and distressed investments. Focused primarily on institutional business earlier in his career, Jaspaul now directs his efforts and his particular ingenuity on the underserved niche of workforce housing, large targets for government agency business, and his clients are benefiting tremendously. "Given where the market is, there's enormous opportunity in workforce housing specifically and the government agency programs continue to resonate with investors," Jaspaul explains. "But I also cover small business lending, providing capital to underserved business owners for owner-occupied commercial real estate, for example."

While Jaspaul is based in CBRE's LA office, his particular skill with government agencies enables him to pursue business all over the country. This allows him to help clients, especially out-of-state borrowers, who may have more limited financing options, and this is one area in which Jaspaul's unique expertise shines brightest. "These government agency programs allow investors the ability to borrow in less liquid markets, including smaller metros in Middle America. Deep-pocketed coastal investors gain access to higher leverage, non-recourse agency loans to finance these deals, which typically sport higher cash flow and a lower price point." With Jaspaul's record of executing some of the most challenging transactions, the substantial number of deals flowing within his niche comes as no surprise.

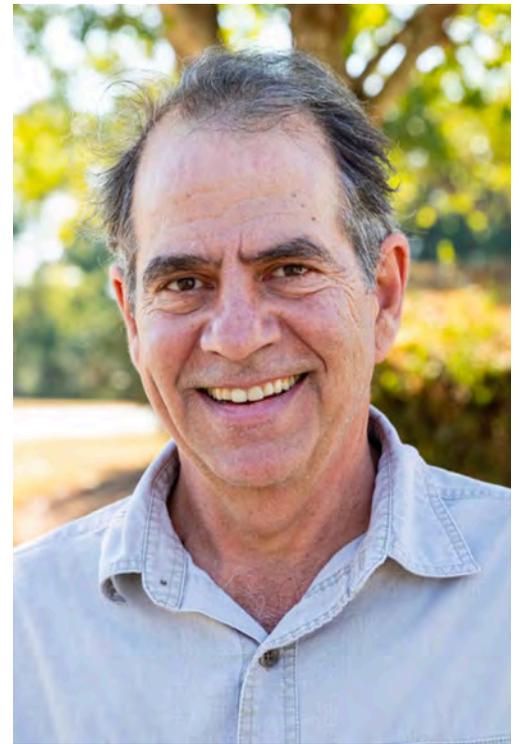
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## BILL BAZZEL

Bill Bazzel is owner of EAM Landscaping, Inc., an Atlanta-based company that provides maintenance and installation services and stormwater solutions primarily to subdivisions, office parks, and condominium complexes across Georgia. He is also CEO and president of PondBusters, which specializes in detention pond maintenance management, inspection and certification to meet EPA requirements. After a lucrative 27-year career in the mortgage industry, executing over \$1B in loans at Bank of America and NetBank, Bill purchased EAM Landscaping in 2015. With the EPA's increasing stormwater requirements, his rare expertise in both areas is a valuable asset to his EAM clients, which include Pep Boys, Extra Space Storage, and Cortland Partners. Bill not only identifies stormwater and landscape issues that could affect the property, structure, or EPA compliance, but he also is able to provide insight into the potential impact on property or mortgage values.

Bill's interest shifted to landscaping after decades of witnessing the correlation between landscape and water-related issues and property/mortgage values. However, an epiphany in 2011 truly changed his career trajectory, after he read the book, *Half Time* by Bob Buford. "I had a successful career as a mortgage banker/lender of record, but I didn't want to be a broker; I had no passion for it," he explains. "I kept asking myself, what am I passionate about?" For Bill, the answer was obvious. Three short years later, he purchased a landscaping company. He adds, "I have a very proud mortgage background and now I'm in the really cool position of being able to use that knowledge to help people on the other side of the property coin. But the same thing drives me. I want people to be in the best possible situation and clean water is an absolute." His commitment to this mantra encompasses both his professional and personal life, with his involvement in charities such as BuildinGUATE, which seeks to empower a community in Guatemala that formerly lived on top of a municipal landfill with vital resources and the promise of God's love. Bill offers this sage advice: "Read Bob's book and find haltime. You can reinvent yourself. Change your career, do something significant, give back. Find your passion and follow it."

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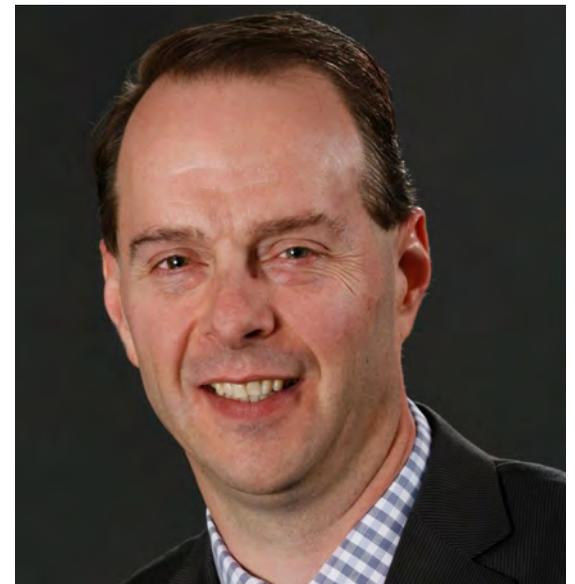


## KEITH UTHE

Keith Uthe's personal vision is that 'everyone shall live a life of abundance.' As a top real estate investment advisor and successful independent mortgage specialist, Keith endeavors to achieve his vision by providing his clients with the most knowledgeable service and trusted guidance that will positively impact their lives.

As a mortgage specialist, Keith represents clients on multiple levels and works with many different lenders to find his clients the best terms for their mortgage. He is also able to assist with commercial mortgages and business financing solutions. Keith adds, "most people assume that there are fees for my services with a typical mortgage and that is actually not the case." Based in the province of Alberta, his company, Mortgage Alliance Enrich Mortgage Group, services clients across Canada. He truly believes that every home or property is an important investment and adds, "Whether you are buying your first home, your last home or an investment property, it is one of the most important purchases that you will make and you need to work with someone who truly understands every aspect of the purchase including rate and the terms of the mortgage." He passionately guides his clients and offers them the best advice so they will live an abundant life moving forward. In addition to assisting clients with the financial lending needed for their homes, Keith is also a certified real estate investment advisor, specializing in legal secondary suites, which help his clients to build portfolios that can offer continued growth. He also offers personalized coaching services to investors that may be struggling with their current real estate portfolio. As an outside the box thinker, Keith works tirelessly and exhausts every possible option to provide the best solution for his customers and to help them achieve their goals.

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## KAMRON BARR

With over 10 years in the construction industry, Kamron Barr has held a variety of titles and has worn many hats in his design, preconstruction, business development, client management, estimating, project management, and executive roles. His experience in the construction and real estate development industries include automotive, government, multi-family, medical office, educational facilities, office, retail, restaurant, manufacturing, and industrial projects. In fact, Kamron has been involved with over 80 projects totaling over \$480 million during his short career. From January 2018 until May 2019, Kamron was in a master's level program at the University of Utah. He was heavily involved not only with in-class participation and presentations but also with outside opportunities. For example, in the spring, he led a team of students to win the 2019 *Utah Real Estate Challenge*. Simultaneously, Kamron was working a full-time job (45-60 hours/week), coaching and raising three young boys at home, with another on the way.

In October, Kamron was named project manager for Project Control Inc., an owner's representative and real estate development firm with five locations in the western United States. PCI's experience covers more than \$3B in the management of the design and construction of hospitality, commercial, civic, municipal, and healthcare facilities. When he is not at PCI, Kamron recognizes the great mentors he has had in his life by giving back to others. He especially enjoys volunteering his time to

those pursuing careers in the development and construction industries. He has mentored students from Brigham Young University, Utah Valley University, The University of Utah, and Weber State. Currently, Kamron is involved with bachelor and graduate programs that offer services to students who need additional help. He teaches individuals construction scheduling, estimating, and project management. He hopes to teach a class at the University of Utah in the future because whether he is in a classroom or in an outside environment, Kamron wants to be a mentor to those who could use one.

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## MACDEUR ALABRE

Macdeur Alabre has successfully utilized his management, analytical and business skills and experience to build an innovative company that offers a technologically advanced product to the real estate industry. Mac is the CEO and cofounder of Lien Library Inc. Established in 2019, Lien Library offers an advanced software platform that assist clients with searching for, finding and fighting liens on real estate properties in southern Florida. The business was developed to change the current title search process which can often be time consuming and expensive. Mac explains, "Through our unique service and user friendly platform, we connect title companies, lien search companies, home buyers and sellers with municipalities that can offer a successful lien search on a property." As a result, liens can be litigated or negotiated based on different terms or local government regulations.

As a founder and CEO, in addition to technical support, Mac manages business growth and development, as well as offering leadership and coaching to employees. Mac says that he is always looking for ways to improve – both personally and professionally and adds, "Just because something is working, doesn't mean it can't be improved. Real estate is one of the oldest industries in the country – but I can still make a difference and the industry can always be improved and innovated." As a unique, niche business, Lien Library continues to grow and the entire staff is dedicated to the following mission, "We are committed to bringing innovation and passion right to your door and we seek to make a difference in every community."



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## MATT G.M. LYONS

As senior vice president, chief lending officer for USE Credit Union, Matt Lyons harnesses his years of experience in finance and lending to mentor and empower his team. In this role since 2017, he manages loan portfolio volume including production of all loan types, establishing competitive rates and also oversees underwriting, capital markets, loan servicing and financial solutions.

Previously, Matt worked in lending and capital markets for La Jolla's Silvergate Bank and spent 14 years in hedge fund, banking and private equity management. He holds a Bachelor of Science degree from Tulane University, A.B. Freeman School of Business.

Active in the community, he has served on the board of VETS, advised an international home building project, and currently serves on the board of the S.L. Scholarship Foundation which helps low income, single parents with college expenses.

With over 200 employees and a net worth of over one billion dollars, USE Credit Union is a California-based lending, banking, investment and financial services provider with locations throughout San Diego and northern California. Listed as one of the *Top 300 Mortgage Loan Originators* in the country in 2018, the Credit Union was also recently named among the *Top Work Places* by the *San Diego Union Tribune*.



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## TREVER EPPERSON

Trever Epperson is director of investments for Future Real Estate, a California real estate investment firm that specializes in the acquisition and sale of mobile home parks, a growing market for investors of multifamily properties. The company has locations in Los Angeles and San Bernardino Counties, with San Diego County on the near horizon. Trever launched Future Real Estate just one year ago with a primary focus on California, and the company hit the ground running, now expanding into three additional states to serve increasing investor demand. In his role as director of investments, Trever specializes in brokering mobile home parks, as well as helping clients with financing and managing the communities.

Multifamily properties have historically been defined in the minds of investors as apartments or apartment buildings—the golden children of institutional lenders, “big money,” and investors. However, mobile home parks, the “cousin” of apartment investing, so to speak, have recently emerged as attractive investment assets. “The market has been building for quite some time, as more and more investors and banks not only have noticed how well the notes on mobile home parks have consistently performed, but have realized that the sector is virtually recession proof,” explains Trever. With 11 years of experience in the industry, Trever’s journey to founding Future Real Estate was a straight and focused path. He began his career as a junior agent with a boutique real estate firm that specialized in mobile home parks, where he gained valuable expertise and honed his skills. His natural entrepreneurial spirit drove him to cofound a company that sold mobile home parks, before leaving to launch his own firm, Future Real Estate, a dual agency that represents both buyers and sellers of mobile home parks. “The concept for Future Real Estate was actually a simple one: to connect buyers and sellers of mobile home parks with the mission to add value to our clients’ selling, buying, financing, holding, and analysis of these properties,” Trever shares. “That’s exactly that we do. That’s our focus every single day.”



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## A.J. CRANE

A.J. Crane explains that he got into the real estate business, pretty much by accident. Born and raised in southern California, after graduating from San Diego State University with a bachelor's degree in political science, A.J. initially worked on staff at the district office for a California congressman, who unfortunately was not reelected. That time period became a crossroads in his life and A.J. decided to leave the political arena and begin a career in the real estate industry.

In 2012, A.J. joined Marcus & Millichap, a renowned real estate brokerage, as an investment sales broker, specializing in retail and investment assets. A.J. quickly moved up the ranks as a successful broker and together with his team, underwrote, listed and sold over \$30 million in assets.

In 2017, after spending five years in a prosperous career with Marcus & Millichap, A.J. was recruited by Sonder Inc. to become the head of real estate for San Diego. Sonder is a revolutionary business that was founded in 2014 with the idea to modernize and reinvent the short-term rental market. A.J. explains, "What we offer is a true hybrid between a hotel and a short-term rental that combines the amenities and services of a hotel with the comfort and functionality of a home."

Under A.J.'s direction the San Diego market was built entirely from scratch and is now one of the largest markets in the company. As the Head of Real Estate, A.J. orchestrated the largest deal in company history – a 38 floor high rise modular construction project, with 260 units in downtown San Diego. Sonder's real estate offerings have grown from an initial presence in nine cities to over 27 cities worldwide. They began with 600 rental units and have increased to over 8,000 and the business is valued at over \$1 billion.

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## JANINE MCVEIGH

As a successful realtor, Janine McVeigh likes to find homes for her clients that meet their very specific needs. With over twenty years of experience in the real estate industry, Janine explains, "Unlike most realtors, who focus on a local geographic area, I focus on niche markets in all five Philadelphia area counties. I help my clients buy and sell homes that have the special features that they desire. For instance, homes with in-law suites, master bedrooms on the first floor, two kitchens, and many other non-traditional amenities"

Janine's broker, Christopher Real Estate Services, is a full-service independent brokerage that focuses on superior service, building strong client relationships, and highly ethical business practices. She is licensed in the states of Pennsylvania and Delaware and while she works with clients throughout both states, she focuses on the Philadelphia 5 county area as well as beach homes on the beautiful Delaware shores. Janine shares that she absolutely loves what she does.

Janine has a unique career background which helps her negotiate agreements for her clients. Before focusing solely on real estate, she worked as an investment analyst, a bank acquisitions officer, and a senior manager of an international software company that delivered financial solutions for Internet merchants. She also managed construction and maintenance projects for commercial office parks and facilities.

Janine is also a world traveler and lived abroad for several years, which she explains, "Helps me to better understand the needs and desires of people from various cultural backgrounds." Janine has a degree in business commerce and was recently recognized by HomeLight for being a *Top 5% Buyer's Agent*.



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## GUILLEM MACIÀ PUIG

At only 29 years old, Guillem Macià Puig has an advanced education, six years of hands-on real estate experience and is already a successful business owner.

Guillem is the founder and CEO of Will To Capital, a real estate investment platform based in Barcelona, Spain. They specialize in property development that offers a 360° service that embraces a global asset management strategy, from the acquisition and start of the project until the commercialization of the properties.

Under Guillem's leadership, the team at Will To Capital studies business opportunities and advises clients regarding when and where to invest. They are a team of experts who complete a full evaluation of property assets, market analysis and business and financing plans to guarantee profitable investments for all of their clients. Whether using their own resources or partnering in joint ventures with different investors, their platform offers a comprehensive system of investment management focused on the activity of property development. Current projects include the construction of more than 60 apartments in Barcelona's top locations.

Prior to opening his business, Guillem worked for over six years in the real estate industry and gained experience in all aspects of real estate hedge funds. His education has also supported his expertise in the business world; he has two master's degrees in real estate law and he also received a bachelor's degree in law from the University of Barcelona.

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## KALEIGH SULLIVAN

After graduating from the University of Maryland in 2012 with a bachelor's degree in kinesiology and exercise science, Kaleigh Sullivan found herself in a challenging situation. Like many young adults, she had a hefty student loan debt, an entry level job and a degree that she struggled to utilize. Fortunately, her luck changed with what she describes as "an accidental house-hack" that helped open her eyes to the power of real estate investing. Buying this first house led to the purchase of additional properties and to her career in real estate.

Kaleigh became an official real estate investor in 2016 and began focusing on both short and long-term rental properties as well as flipping houses. Her responsibilities as an investor include finding the houses, analyzing the deals, securing financing, interior design, managing contractors and sub-contractors, property and project management, hosting Airbnb's, administrative work and the buying and selling process. As Kaleigh's love and knowledge for real estate grew, she wanted to find a way to share her experiences and inspire others. This led to her social media presence where she posts renovations of both hers and those she admires along with tips, statistics and facts about real estate. After she began to receive a lot of questions pertaining to the facets of real estate, Kaleigh decided to start a consulting business so that she could better answer these questions for the public.

KD Development was established in 2019, and Kaleigh serves as the founder and chief executive officer. It is a real estate-based company that specializes in design consulting, real estate investing coaching, home selling resolutions, and social media growth and influencing. Kaleigh explains that the company's motto is "from house to home" because whether it is from flipping a property or from redesigning a client's current residence, they strive to make each home unique. According to Kaleigh, clients who choose KD Development can expect to receive exceptional service, valuable information, and an increase in the property value of their homes. Kaleigh also takes pride in incorporating "a touch of personality" and "purposeful design" into every project in order to meet the specific needs of each individual client. This is how she guarantees that each house will become a home.

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**Greg Hixon** uses his talented writing and web-design/development skills to successfully draw online traffic and prospects to real estate professionals in Mexico. He accomplishes this through his company, RE/MEX IMAGE/ ReMexIMAGE.com, which provides blogging and website services that elevate the online image of his clients.

**RE/MEX BLOGS – ReMexBLOGS.com:** As a professional real estate blogger in Mexico, Greg’s clients include distinguished Mexican real estate brokers, Mr. David Pullen of DavidPullenProperties.com in Puerto Vallarta, and Mr. Nick Fong of LosCabosAgent.com in Los Cabos. They hire him to write informative and insightful blog posts about specific aspects and features throughout their region to attract readers even before they visit Mexico. These posts provide the perfect introduction to the broker ahead of time. Therefore, when visitors decide to buy a vacation home, they already know who to call! Greg utilizes keyword market research to ensure his clients’ posts rank highly with online search engines. The phenomenal results happen when people search about Mexico, they are directed to the broker’s website and blog for answers; valuable content that satisfies their curiosity and entices them to become a new prospect.

**RE/MEX AGENT – ReMexAGENT.com:** Being a professional website designer and developer, Greg builds exceptional Mexican real estate websites for his clients. It all starts with a great design; the artwork! He works closely with each client in Mexico to design a beautiful and fully functional website for them. To explain, Greg helps his clients choose the right colors, style, and layout for their custom website theme. After each design is exactly what Greg’s clients fall in love with, he develops them to perform according to his clients’ needs and wishes. Then, Greg publishes each completed website onto his clients’ internet domains and fully supports them moving forward. Finally, he installs the best technology for IDX MLS, online forms, email lists, newsletters and drips, and SEO (search engine optimization), to ensure the most reliable and effective real-estate platform possible.

**Greg Hixon’s Experience:** While working as an engineering technician, technical writer, and project manager at Intel Corporation for over 15 years, Greg honed his excellent communication and presentation skills. There, he wrote and published white papers, training materials, proposals, and other technical documentation. Also, his notable success as a project manager at Intel reflects his array of skills to plan and complete projects on schedule and within budget. Greg began blogging in 2014, with GravyGrowth.com, his entrepreneurial business-startup blog. During his first few years, he meticulously refined his skills based on feedback from professionals, research, and practice. Since then, he’s written for many blogs; both his own and for his numerous clients. In mid-2017, he became a real estate assistant for Susie Flinn, a prolific, well-known, top-selling real estate broker in Puerto Peñasco (Rocky Point), Mexico. Greg has learned all aspects of the Mexican real estate industry while helping her educate clients, walk them through the process, create listings, and close the real estate sales. Also, that is when Greg began blogging about amazing topics in Mexico. Greg has combined his skills in writing great blog posts and high-end web design/development with Mexican real estate to become a professional online Mexican real estate image creator. He offers reliable, engaging and informative websites and blogs that feature everything his clients wish to feature about them and their regions in Mexico. His clients’ websites and blogs draw visitors from around the world, especially from the United States and Canada, to increase exposure and ultimately grow their businesses.



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**Zack Hilgendorf** is vice president of Quantum Real Estate Advisors, Inc., an investment sales brokerage company focused on assisting clients across the globe with the acquisition and disposition high-quality commercial real estate. Zack uses his unique skill set and extensive knowledge of the nuances of net-lease transactions to advise clients in buying or selling retail properties nationwide. His mastery of the industry and his dedication to their success has proved a valuable combination for his clients. Zack joined the company in 2016, and in just three short years, he has achieved over \$300 million in sales – an impressive testament both to his commitment to his clients and to his industry expertise. With his recent execution of a \$50 million Walmart/Home Depot portfolio and pending closure of 20 retail properties worth \$100 million this year, the industry has taken notice of Zack’s success. He is ranked among the nation’s top investment sales brokers in the U.S., and has been featured in numerous publications, including *REJournal’s*, *CRE Future Leaders* and *Real Estate Weekly’s, Rising Stars*.

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## RICARDO MENDIOLA

Ricardo Mendiola has taken the elite skills and experience that he gained establishing MSI Credit Solutions, a successful credit restoration company, and turned his focus into a lucrative career in real estate.

As the founder and owner of MSI Credit Solutions, Ricardo and his team work closely with each individual client, offering personal and effective solutions through each phase of the credit restoration and rebuilding process. With over thirteen years in business, he has extensive experience working with clients and guiding them to make the right financial decisions to better their credit and their lives.

Ricardo has taken the same personal touch and skill set that works so well with the credit repair process and applied these unique characteristics to his career as a licensed real estate agent. He explains, "I developed this idea about five years ago, as most of my clients wanted to buy homes after their credit was restored. I wanted to help these clients with the next step they were taking." Since 2015, Ricardo has excelled as a real estate agent working for Keller Williams and explains that many of his real estate clients were previous credit repair clients who finally have their financial feet back on the ground again. By leveraging former clients and helping them with the next steps in their financial real estate journey, Ricardo feels he has truly found his niche. He adds that his wife is also a loan officer who handles all the mortgage lending – so they have ultimately established a "one-stop-shop" for clients.

Ricardo also has a wealth of knowledge when it comes to real estate investing. He has experience with long term rentals as well as investing in properties that he rents through partner companies like Airbnb and VRBO. As Ricardo continues to focus on growing his business, he is also gaining additional certifications from TREC (Texas Real Estate Commission) to further educate his clients.



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## STEVEN SPERANDIO

As a partner and senior managing director for the newly launched B6 Real Estate Advisors, Steven Sperandio leads production for its Capital Advisory Division, where he arranges debt, and sources equity and joint-venture investments on behalf of clients. Steven has an extensive history in commercial real estate finance, including expertise in debt placement, loan origination and asset valuation. This expertise stems from over ten years of lender experience prior to his entrance over to the advisory space, where Steven developed an elite skill set by performing loan sizing, underwriting and due diligence on \$6+ billion of balance sheet and CMBS financings.

Steven explains, "I have significant experience sourcing debt and equity financing across all asset classes, which enables me to position the firm as a disruptor in the debt and equity space, ultimately allowing B6 to secure the most favorable financing on behalf of our clients." B6 Real Estate Advisors ("B6") is an investment sales and capital advisory brokerage firm, founded by real estate legend and former mayoral candidate, Paul Massey, that has operations in NYC & NJ. The firm focuses on a distinct territory network model that ensures sub-market expertise for its agents, along with an owner-aligned philosophy and a technology forward platform. Steven joined B6 in September 2018, and was both privileged and excited to work with industry veteran, Paul Massey. He explains, "To collaborate with B6's investment sales professionals, combined with the ability to further advance my career at a firm that prioritizes the growth of its people, weighed heavily in my decision to join B6."

Leading up to his current role, Steven served as the key lieutenant for deal execution in the Debt & Structured Finance Group at Newmark Knight Frank ("NKF"), where he received NKF's *Rising Star Award* in 2016. Previous to NKF, Steven was a vice president in loan originations at Cantor Fitzgerald's CCRE. Steven earned a Master of Business Administration (M.B.A.) degree from the University of Miami, with a dual concentration in finance and real estate, and a Bachelor of Business Administration (B.B.A.) degree in finance from Pace University. In 2019, Steven received the *Rising Star of Commercial Real Estate – Advisory Award* from the *Real Estate Finance & Investment* industry publication.





# MATT BECK | BECK INVESTMENT GROUP

After running his own successful California-based real estate investment company for over 25 years, managing a full staff of employees and focusing mainly on acquisitions, Matt Beck decided to make a change. He sold the business to his partner, moved across the country, and set up a new shop in New York City.

Today, Matt is CEO of the Beck Investment Group, a business that he founded in 2018. Based in downtown Manhattan, Matt handles the investments start to finish, which as he explains, “Allows me to ensure that everything is handled properly.” As the CEO, Matt manages the entire scope of the business including marketing, acquisitions, deal source communication, legal communication, sales and operations.

Beck Investment Group provides commercial banks with an exit strategy for non-performing, environmentally distressed, commercial property notes. Beck Investment Group purchases these notes, which are often secured by contaminated or environmentally challenged commercial property. His clients are banks and financial institutions throughout the US. With a fair amount of experience in the industry, Matt is an expert at assisting banks with the disposal of their problem loans. After purchasing these assets, his goal is to revitalize and remediate, in order for the properties to become fit to occupy and once again add value to the community.

In addition to his professional accomplishments, Matt is passionate about helping and giving back to communities and organizations across the world. He is very active in charitable work, spending his time in Uganda, Kenya, South Africa, Haiti, Brazil, and Mexico, working with several causes including, Free Wheelchair Mission, Care Point Ministries, and outreach with Mariners and Bel Air Church.

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# RALPH TRINIDAD

With over 20 years of comprehensive experience in the mortgage industry, focused on loan originations and sales leadership roles, Ralph Trinidad decided to use his expertise to start his own business, United Solutions Mortgage Group.

Ralph is the president and owner of United Solutions Mortgage Group, a mortgage brokerage that he founded in May, 2018. Licensed in the state of Pennsylvania, Ralph and his team focus on first time home buyers, consumer education and developing lasting relationships with clients.

Ralph explains that United Solutions is part of a resurgence of the local mortgage broker and part of a movement to deliver the best financing options to consumers, “We did our research, spoke with local real estate agents and compared our prices to our local competition. We are able to deliver superior financing options to our community.” As experienced mortgage brokers, they have strong relationships with many lenders and believe the wholesale channel is the best way for consumers to obtain mortgage financing.

The business focuses on community, taking time to connect with residents and provide honest financial guidance. Ralph explains, “Here in Lehigh Valley, 53% of our population is Latino; we are a Spanish speaking organization and part of our mission is to ensure that the Latino community has an equal opportunity at home ownership, financial education and mortgage financing.”

United Solutions Mortgage Group is a steadily growing mortgage brokerage and Ralph has continued plans for growth including offering clients other financial services such as insurance and financial planning. He sums up his business success, “I value my real estate partners. Above all I seek relationships with those partners and more importantly each of our clients. We are not in the transaction business. We are in the people business.”

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## AARON SAMPLES

As a strategic leader and the CEO of First Guaranty Mortgage Corporation, Aaron Samples is responsible for managing and guiding an elite team of employees to fulfill the corporate vision of the business as well as continuing to build share value for stakeholders. First Guaranty Mortgage Corporation (FGMC) is a successful, independent mortgage banking firm that has been in business for over 30 years. They are licensed in 49 states and offer a variety of mortgage loan solutions across the nation. The success of the business is based on the philosophy of thinking “outside the box”, recognizing that every person’s situation is unique.

FGMC offers a robust line of products and programs to help consumers achieve their financial goals. They provide homeowners the ability to purchase homes, refinance and take out equity through their nationwide retail lending platform, GoodMortgage. FGMC also maintains a robust business to business platform with executions in both correspondent and wholesale lending. FGMC and GoodMortgage recently launched Maverick Solutions, a proprietary suite of products designed for the entrepreneurial mindset. This non-QM and alternative product offering is intended to help borrowers who fall just outside standard agency guidelines and get them into the homes they deserve. FGMC estimates it will originate over \$6 billion this year and service the loans of over 50,000 clients across the nation.

Aaron adeptly oversees the entire business at FGMC including the areas of production, operations, servicing, compliance, and strategy for the firm. He adds that his biggest daily challenge is to motivate a large employee base across the nation, including outsource services to ensure that they continue to move forward in a progressive, fresh, efficient way that best services our clients' needs and keeps FGMC ahead of the market. It is apparent that he has been successful in his leadership as FGMC was named a *Top Mortgage Employer* by the *National Mortgage Professional Magazine* in 2019.



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## ZACHARY KAYAL

As the head of marketing and business development for Lynx Mortgage Bank LLC, Zachary Kayal applies the knowledge and skills that he acquired studying mass media and communications in college and the hands-on experience he gained working as a marketing intern. A master of social media marketing, Zachary has taken Lynx Mortgage Bank LLC into the spotlight by growing their digital presence exponentially. Lynx, one of the area’s premier mortgage companies has been nominated as *Long Islands Best Mortgage Company*.

Zachary graduated with a B.A. from Hofstra University in 2018. As a student he was active in several organizations and was the president of his fraternity, *Alpha Epsilon Pi*. While studying communications, Zachary submitted an independent communications study about social media and the 2016 presidential election. As a result, he and his peers were selected to go to Boston to speak at the Eastern Communications Association (ECA). They were among the youngest participants to ever speak at the conference. In his senior year, he conducted an independent study on the connection between social media and mental illnesses for his senior thesis. Hofstra presented the thesis and Zachary was named *Senior of the Year* for the Mass Media Department at Hofstra.

While still in college, Zachary began interning at Lynx Mortgage Bank LLC, a local mortgage bank on Long Island, handling marketing and social media. After graduation, he was offered a permanent position as the head of marketing and business development. In this role, Zachary handles all facets of communications, including social media, marketing and advertising. In August 2018, Zachary was honored to be contacted by Facebook for successfully using their platform to promote a small business. He was invited to Facebook headquarters to share his feedback and give suggestions on how to enhance their platform for small businesses. In addition to his professional accomplishments, Zachary is an Eagle Scout and was recently selected as one of the recipients of the 30 *Under 30*, which honors the 30 most successful young professionals under the age of 30 in Long Island. Zachary received the award from the Huntington Chamber of Commerce.



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## TJ CORNWALL

With a record of successful startups and a growing real estate firm, TJ Cornwall is a dream maker of sorts. As director of sales and business development for The Realm Agency, he attributes the firm’s success to his team of like-minded dreamers and the relationships they’ve built with their clients. Founded in 2018 in Dallas, Texas, The Realm Agency focuses primarily on apartment leasing in the Dallas-Fort Worth area, and has just opened a residential division to serve home buyers and sellers. Its leasing services are free for its clients, and the process is personalized from beginning to end. “Our main goal is to help our clients find something they’re going to love. We make sure everyone is always happy and satisfied.”

In his role, TJ is responsible for finding agents, hiring them, and growing the business; however, he also feels it’s his duty

to nurture the dreams of his agents. “My team is amazing,” he explains. “I look at them, and they all have big dreams and dedication. I had people in my corner when I started, so I want to be that for them. The growth of the business is largely due to the team.” Since its launch, the company has grown from three to 10 agents, and forecasts to more than double that in the next year. Prior to starting at the firm, TJ’s short but wild career path took him from touring musician, “grinding away to make a dream come true,” to a corporate role in Baltimore, followed by a stint in Australia where he met one of his first mentors, Justin Viles. “He was one of the first employees at Google Australia,” TJ shares. “He shaped my entire business career teaching me that there is no dream too big if you possess the grit to bring it to life.” Armed with a decade of experience and a degree in economics from Penn State, TJ helped launch The Realm Agency with the goal to become a household name. “Our immediate focus is to continue to develop talent and connect on a deeper level with the various communities in and around Dallas-Fort Worth to further expand our footprint,” he explains. “Our long-term vision includes expanding into additional cities across the country and developing technology solutions to streamline the process for renters, buyers, and sellers.” TJ points to the firm’s core philosophy as its driving force, and one he instills in his agents: “Provide the most elite customer service you could possibly provide to clients. Everything else is just noise. Treat your client like you would treat your best friend, and if you do everything you can, it usually ends in happiness.”

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## DEBORA PEREZ-RUIZ

Debora Perez-Ruiz was one of the few Hispanics in real estate when she began her career 36 years ago. In fact, she worried about showing her last name in fear of losing potential clients. However, Debora believed that the real estate community needed to be diversified because buying and selling a home is one of the biggest investments most people ever make and having bilingual realtors available guarantees them the best service possible.

In 2007, Debora decided to start her own business in Lubbock, Texas. One of the primary reasons she was motivated to enter the real estate industry in the beginning was because she wanted the flexibility as a mom of two girls. Therefore, she was inspired to name her company after them. The name MoVaDe came from Monica, her oldest daughter’s name; Vanessa, her youngest daughter’s name; and Debora, her own name.

At MoVaDe, Debora specializes in residential real estate, and assists investors with property management as well. She particularly enjoys working with veterans and says, “They have fought for us and have paid their dues to use their VA loans.” Unfortunately, that sometimes presents challenges, but Debora is determined to help them to get what they are owed. In fact, she just became a military relocation specialist in order to better assist her clients.

Debora says that she always does her best to get the designations needed to stay on top of the ever-changing field of real estate. In addition to becoming a military relocation specialist, she is a senior real estate specialist and has the short sales and foreclosure resource designations; GRI, CRS, and CRB, and has just obtained the Commitment to Excellence (C2EX) Endorsement from the National Association of REALTORS®. She also became the first Hispanic president of the Lubbock Association of REALTORS® in 2012.

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