
SENIOR REAL ESTATE INVESTMENT RESEARCH STRATEGIST

Analytically driven professional with an established background in real estate market research and strategy. A critical thinker with a history of producing custom resources designed to achieve specific investment performance goals. A track record of documented contributions including executing rigorous analysis to support transaction-based and market-level recommendations.

HIGHLIGHTS OF QUALIFICATIONS

- Furnished market and submarket analysis to investment committee members for real estate deals averaging \$100 million in value in key North American markets across property types.
 - Developed quantitative research deliverables using economic and real estate data to provide strategic investment guidance, risk assessment, and portfolio analysis for global private equity funds.
 - Collaborated in launch of new business initiatives to forecast rent growth using quantitative models for major U.S. metro areas and property types for underwriting purposes.
 - Increased revenue opportunities by expanding global research platforms and contributing to preparation for launch of new funds, including those in the U.S., Latin America, and Asia.
 - Established strong written and oral skills, authoring detailed research publications and delivering formal presentations to company executives and institutional clients.
 - Ensured a high level of performance by recruiting, training, and managing a team of talented researchers.
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PROFESSIONAL EXPERIENCE

The Davis Companies, Boston, Massachusetts (July 2021 – Present)

Director of Research

- Developing newly established real estate research platform to support investment strategy, acquisitions, and portfolio management.
- Identify expansion markets and compelling opportunities for launch of new fund with \$1 billion target through in-depth analysis.
- Highlight key macro trends that influence capital markets, sector allocation, and asset-level investment decisions.
- Created tool that combines demographic, economic, and real estate data for each major property type used regularly to evaluate investment prospects.
- Produced methodology for construction cost escalation projections that are updated quarterly to support underwriting efforts.
- Compose custom market outlooks for client presentations, executive meetings, and written materials.

ABERDEEN STANDARD INVESTMENTS, Boston, Massachusetts (August 2019 – June 2021)

Head of Real Estate Investment Research - Americas

- Communicate quarterly real estate market house views to global investment teams for the Americas region across all major property types, including apartment, industrial, office, and retail.
- Forecast returns for North American markets used to guide investment decisions in public and private real estate platforms.
- Evaluate and approve market strategies for Real Estate Multi-Manager fund recommendations as an investment committee voting member.
- Develop projections for alternative real estate sectors, such as data centers and single-family rentals, to inform investment selection process for research-driven exchange-traded fund.
- Present investment outlook to existing and prospective institutional clients to support fundraising efforts.
- Distribute regular written commentary and analysis to update stakeholders on relevant market trends.
- Publish thought leadership pieces highlighting key investment themes, such as global urbanization trends and U.S. suburban office.

PROFESSIONAL EXPERIENCE (Continued)

BENTALL KENNEDY, Boston, Massachusetts (August 2017 – August 2019)

Vice President, Research (June 2019-August 2019)

Assistant Vice President, Research (August 2017-June 2019)

- Led strategic research initiatives and formulation of market outlooks as a property sector specialist.
- Presented formal market briefs to investment committee members to evaluate prospective real estate acquisitions and dispositions across major property types.
- Introduced new methodology to forecast rent growth used in underwriting process.
- Collaborated with portfolio and asset management to rate existing assets through analysis of granular real estate, demographic, and economic data.
- Contributed to development of new market strategy efforts for launch of new funds.
- Delivered presentations to investment teams communicating sector and market views.
- Generated original content for the company's semiannual Perspective report and other written pieces.
- Supported business development goals through delivery of custom research materials.

PGIM Real Estate, Madison, New Jersey (May 2014 – July 2017)

(Formerly Prudential Real Estate Investors)

Assistant Vice President, Investment Research (February 2016 – July 2017)

Associate, Investment Research (May 2014 – January 2016)

- Provided custom, timely recommendations to support global real estate investment management business with assets of +\$60 billion.
- Served as the company's industrial research specialist, leading the sector's forecasting process and thought leadership efforts.
- Presented market and submarket research findings to investment committee members to support real estate transaction decisions in the U.S. and Latin America across property types.
- Developed quantitative tools to aid in investment strategy, market risk assessment, and portfolio analysis.
- Supported growth of Latin American business by providing new market research resources to investigate opportunities in Mexico and Brazil.
- Produced original presentations for institutional clients and global partners.
- Completed formal papers distributed to senior executives, portfolio managers, and clients.
- Ensured a high level of performance by recruiting, training, and managing a team of talented researchers.

COSTAR PORTFOLIO STRATEGY, Boston, Massachusetts (October 2010 – May 2014)

(Formerly Property & Portfolio Research)

Real Estate Economist (October 2010 – May 2014)

- Advised institutional clients regarding real estate investments and new opportunities in major North American markets, including San Francisco, Silicon Valley, Seattle, Phoenix, and Vancouver, Canada.
- Executed research for profitable decision making on real estate deals that included detailed analysis of key economic trends, demographic characteristics, and real estate fundamentals.
- Managed econometric forecasting process of real estate fundamentals and performance series.
- Orchestrated high-level quantitative analysis, formal reports, and created custom deliverables.
- Led efforts to expand medical office research platform and piloted the development of new metro-level fundamentals forecasts within this segment.
- Delivered formal presentations at semiannual client reviews, quarterly advisory board meetings, annual client conferences, and represented company to national and local media outlets.

EDUCATION

BOSTON UNIVERSITY, Boston, Massachusetts

- Master's Degree, Economics (Completion 2010)

FLORIDA STATE UNIVERSITY, Tallahassee, Florida

- Bachelor's Degree, Economics (Summa Cum Laude)

MIT SCHOOL OF ARCHITECTURE AND PLANNING, Boston, Massachusetts

- Certification, Data Science in Real Estate (2021)
 - Certification, Commercial Real Estate Analysis and Investment (2020)
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TECHNICAL SKILLS

- Microsoft Office (Excel, PowerPoint, Word, Access)
- Microsoft Power BI
- Tableau
- RStudio
- Real estate data platforms (Axiometrics, CBRE-EA, CoStar, Green Street, NCREIF)