

# DAVID LEVY, CFA, CRE, MAI, MRICS

## PORTFOLIO MANAGEMENT AND RESEARCH & STRATEGY



**David Levy** is an innovative and strategic global real estate investment executive focused on delivering performance and managing risk. He has held senior positions and led teams within prominent real estate investment management firms throughout his career.

David Levy is currently Managing Partner of Milestone Investment Research, LLC, a boutique real estate investment advisory firm. Prior to Milestone, he was a Managing Director of Portfolio Management and Research & Strategy at BentallGreenOak (BGO). He guided the strategic direction for the US equity real estate portfolio of the Sun Life General Account and supplied oversight for the Sun Life US mortgage portfolio. David was a senior member of the Research & Strategy team at BGO focusing, particularly, on the development of a research-driven approach to data analytics. He also led a team of professionals based in Toronto who managed the property valuation process for the company's private real estate direct equity investment portfolios across Canada. Through these efforts, David and his teams provided market intelligence for North American and global markets, as well as tactical investment recommendations relative to asset and property cycles.

David joined BentallGreenOak in 2019. Prior to BGO, he served as Head of the Valuation Center of Excellence for Bentall Kennedy & NewTower Trust and Managing Director at Sun Life, serving as Head of Real Estate Research and Valuation.

David has over 30 years of experience in the real estate sector. Prior to joining Sun Life, David was Global Head of Research and Investment Underwriting for Pembroke Real Estate, a private equity division of Fidelity Investments, where he managed the firm's strategic selection of markets and oversaw the risk analysis of all acquisition and development efforts across North America, Europe, Japan, and Australia. He was also formerly the original founder of Milestone Investment Research, Director of Research at Liberty Real Estate, a division of the Liberty Financial Companies, and a senior consultant at Laventhol & Horwath.

David is a CFA charterholder, a member of The Counselors of Real Estate (CRE) where he was recipient of the 2018 Chair's Award, board member and former Chair of the New England Chapter, local chair of the 2022 CRE Annual Convention, and Chair of the Virtual Programming Committee, a Member of the Appraisal Institute (MAI), a Member of the Royal Institution of Chartered Surveyors (MRICS), and an associate member of the Urban Land Institute (ULI). David holds a Bachelor of Arts in Environmental Geography from Middlebury College (Senior Thesis: Urban Revitalization - The Impact of Gentrification on Retailing) and earned a MA in Real Estate and Urban Analysis from the Warrington College of Business Administration at the University of Florida (Master's Thesis: Transferable Development Rights - TDRs). He has also authored and lectured on global real estate trends & issues and mentored students at numerous colleges and universities across the U.S.