



United Plus Property Management®
by **unitedgroup**

AWARD-WINNING
PROPERTY MANAGEMENT

SENIOR | MULTIFAMILY | STUDENT | COMMERCIAL



TABLE OF CONTENTS

| | |
|-----------------------------|----|
| I. Overview | 03 |
| II. Operations | 10 |
| III. Lifestyle Programming | 16 |
| IV. Sales | 22 |
| V. Marketing | 28 |
| VI. Accounting | 36 |
| VII. Human Resources | 38 |
| VIII. Facilities Management | 42 |
| IX. Reporting | 46 |
| X. Additional Services | 48 |
| XI. Next Steps | 50 |



A group of people, including a man in a vest and several women, are gathered around a roulette table in a casino. The man is looking at the roulette wheel, while the women are watching. The background shows a large room with windows and a sign that says "SOVANA".

I. OVERVIEW

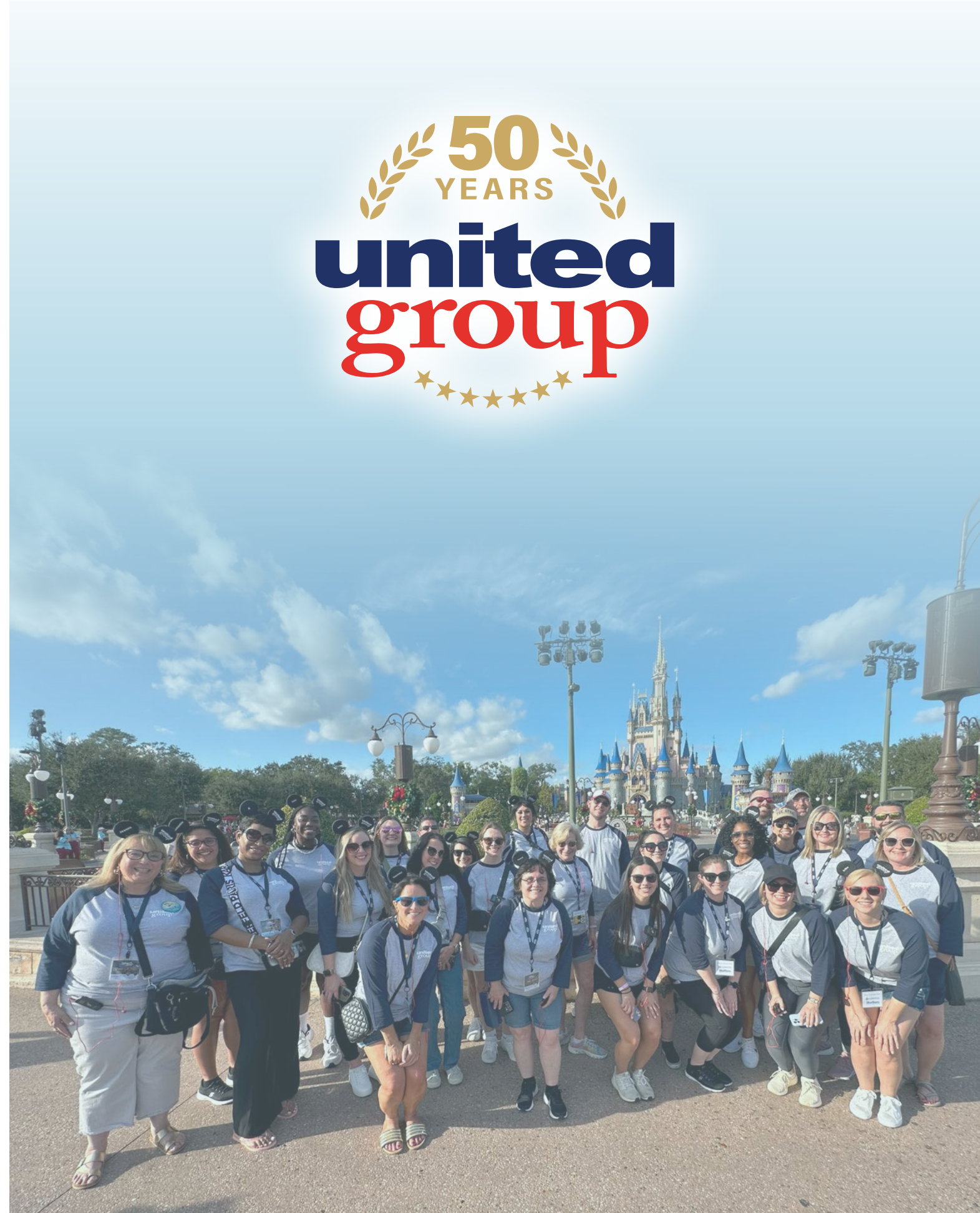
Who We Are

Mission Statement

United Group is a full-service, vertically integrated leader in real estate development and management with over 50 years of industry expertise. Our mission is to develop, build and acquire vibrant communities where our residents, investors, partners, and commercial clients feel welcome, connected, and fulfilled. Our commitment to innovation sets us apart and is evident in our award-winning lifestyle programs. We firmly believe that where you live, and work, should be an experience that enriches and improves your life. United Group provides a place to call home and a space where businesses thrive in all communities we join.

What Sets Us Apart

- » **Boutique property management firm** with a focus on precision, and offering strategies beyond the standardized ones delivered by larger firms.
- » **Award winning:** Over 50 awards including two time winner of the Accredited Management Organization (AMO®) of the Year by the Institute of Real Estate Management (IREM)
- » **Focused on elite results:** Optimized NOI, revenue growth that outperforms market forecasts, tenant retention and satisfaction, and cash flow consistency.
- » **Top 5 in the industry** for leasing efficiency, access to executive expertise, customized reporting, and lifestyle programming



Leadership Team

With over 300 combined years of experience in real estate management, as well associated industries, the leadership team at UPPM has the talent, knowledge, and enthusiasm to drive results.



Michael J. Uccellini
Principal & CEO
33 years experience



Michael DiGiacomo
Chief Operating Officer
18 years experience



Joan Cavanaugh
Chief Human Resources Officer
39 years experience



Tracey Poissant
Chief Financial Officer
23 years experience



Jonathan Kaplan
VP, Asset Management
17 years experience



Francine Bass
VP, Sales
31 years experience



Joanne DiMarco
VP, Lifestyle & Commercial Leasing
39 years experience



Corey Deame
Director of Marketing Services
16 years experience



Ashley Wysocarski
Director of Field Marketing
13 years experience



Erin VanDeusen
Director of Operations
12 years experience



Marybeth Riscica
Sr. Regional Manager
17 years experience



Julie Bohl
Regional Manager
24 years experience

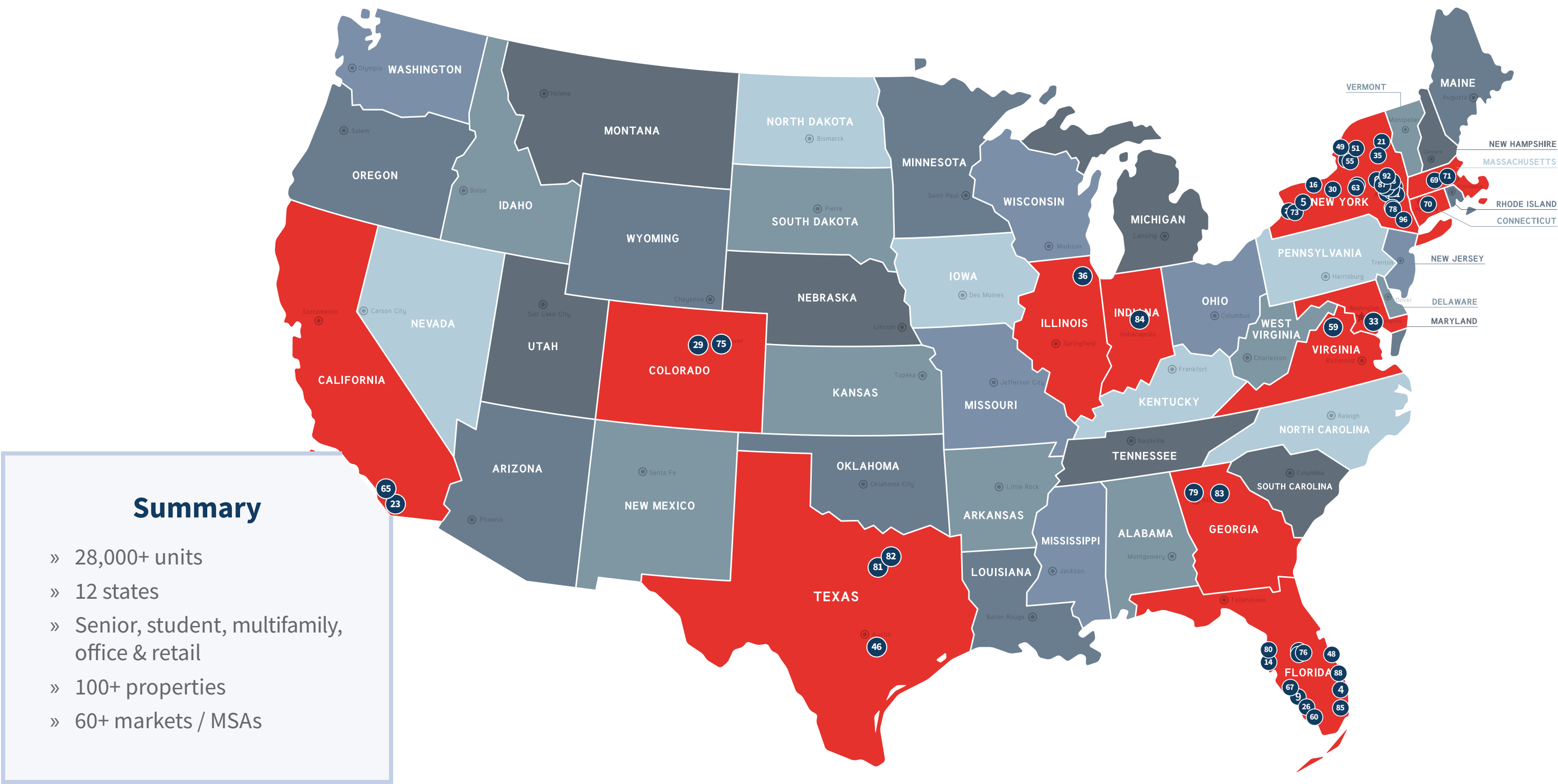


Stacey Spinner
Regional Manager
25 years experience



Cullen Moran
Regional Manager
5 years experience

Properties Managed – Historical



Properties Managed – Historical (continued)

| # | Property | Asset Type | Units | City | State |
|----|--------------------------------------|-------------|--------------|--------------------|-------|
| 1 | 300 Jordan Road | Commercial | | Troy | NY |
| 2 | 39 Columbia Street | Commercial | | Albany | NY |
| 3 | 400 Jordan Road | Commercial | 100,000 | Troy | NY |
| 4 | Arcadia Gardens | Senior | 220 | Palm Beach Gardens | FL |
| 5 | Asher Crossing | MultiFamily | 90 | Williamsville | NY |
| 6 | Avis Lube | Commercial | | East Glenville | NY |
| 7 | Beltrone Living Center | Senior | 248 | Colonie | NY |
| 8 | Bermuda Lakes Apartments | MultiFamily | 208 | Kissimmee | FL |
| 9 | Campo Felice | Senior | 323 | Fort Meyers | FL |
| 10 | Capital Repertory Theater Garage | Commercial | | Albany | NY |
| 11 | Cedar Park Apartments | | | Troy | NY |
| 12 | City Station North | MultiFamily | 66 | Troy | NY |
| 13 | City Station North | Commercial | | Troy | NY |
| 14 | Clearwater Apartments | MultiFamily | 90 | Clearwater | FL |
| 15 | Cohoes Redevelopment Associates | MultiFamily | 77 | Cohoes | NY |
| 16 | College Suites at Brokport | Student | 122/401 beds | Brockport | NY |
| 17 | College Suites at City Station East | Student | 48/157 beds | Troy | NY |
| 18 | College Suites at City Station South | Student | 54 | Troy | NY |
| 19 | College Suites at City Station West | Student | 48/184 beds | Troy | NY |
| 20 | College Suites at Hudson Valley | Student | 72/268 beds | Troy | NY |
| 21 | College Suites at Plattsburgh | Student | 114/397 beds | Plattsburgh | NY |
| 22 | College Suites at Washington Square | Student | 69/264 beds | Schenectady | NY |
| 23 | Country Villa | MultiFamily | 200 | Escondido | CA |
| 24 | Crescendo Lofts | MultiFamily | 42 | Buffalo | NY |
| 25 | Deerfield Place | MultiFamily | 156 | Utica | NY |
| 26 | Diamond Oaks Village | Senior | 160 | Bonita Springs | NY |
| 27 | Diamond Rock Terrace | Senior | 117 | Troy | NY |
| 28 | Empire Commons | Student | 1196 beds | Albany | NY |
| 29 | Epoque Golden | Senior | | Golden | CO |
| 30 | Finger Lakes College Suites | Student | | Canandaigua | NY |
| 31 | Fox Run at Fulton | Student | | Poughkeepsie | NY |
| 32 | Fulton Landing | MultiFamily | | Poughkeepsie | NY |
| 33 | Gardens of Annapolis | Senior | 106 | Annapolis | MD |
| 34 | Glenmont Abbey Village | Senior | 138 | Glenmont | NY |
| 35 | Greenwood Apartments | Senior | 122 | Lake Placid | NY |
| 36 | Hanover Place | Senior | 150 | Tinley Park | IL |
| 37 | Hearthstone Village | Senior | 144 | Latham | NY |
| 38 | High Street Lofts | MultiFamily | 67 | Poughkeepsie | NY |
| 39 | Hudson Valley Student Housing | Student | 144 | Troy | NY |
| 40 | Huntington Heights Apartments | MultiFamily | 151 | Watertown | NY |
| 41 | Kennedy Garage | Commercial | | Albany | NY |
| 42 | Loudon House | MultiFamily | | Loudonville | NY |
| 43 | Midrise Apartments | Senior | 101 | Mechanicville | NY |
| 44 | Monument Square Apartment | Senior | 94 | Troy | NY |
| 45 | New York State Assembly Building | Commercial | | Albany | NY |

| | | | | | |
|----|--------------------------------------|-------------|--------------|---------------|----|
| 46 | Northstar Georgetown | Senior | | Georgetown | TX |
| 47 | Office of Real Property Services | Commercial | | Albany | NY |
| 48 | Parasol Melbourne | Senior | | Melbourne | FL |
| 49 | Parkstead Clayton | MultiFamily | 100 | Clayton | NY |
| 50 | Parkstead Copenhagen | MultiFamily | 75 | Copenhagen | NY |
| 51 | Parkstead Gouverneur | MultiFamily | 75 | Gouverneur | NY |
| 52 | Parkstead Philadelphia | MultiFamily | 150 | Philadelphia | NY |
| 53 | Parkstead Watertown at Black River | MultiFamily | 224 | Watertown | NY |
| 54 | Parkstead Watertown at City Center | MultiFamily | 256 | Watertown | NY |
| 55 | Parkstead Watertown at Thompson Park | MultiFamily | 120 | Watertown | NY |
| 56 | Pinewood Park | MultiFamily | 204 | Kissimmee | FL |
| 57 | Pinnacle Living at Forts Ferry | Senior | 63 | Latham | NY |
| 58 | Pizza Hut | Commercial | | Menands | NY |
| 59 | Prosper at Winchester | Senior | | Winchester | VA |
| 60 | Sandalwood Village | Senior | 163 | Naples | FL |
| 61 | Schaffer Heights | Senior | 118 | Schenectady | NY |
| 62 | Schaffer Heights | Commercial | | Schenectady | NY |
| 63 | Schulyer Commons | Senior | 144 | Utica | NY |
| 64 | Sheridan Hollow Plaza | Commercial | | Albany | NY |
| 65 | Sun d' Dale Apartments | MultiFamily | 299 | San Diego | CA |
| 66 | Terracotta Terrace | Senior | 152 | Casselberry | FL |
| 67 | The Alloro at University Groves | Senior | 183 | Sarasota | FL |
| 68 | The Apex at Crossgates | MultiFamily | | Guilderland | NY |
| 69 | The Arbella at Ashland | Senior | 190 | Ashland | MA |
| 70 | The Arbella at Blue Hills | Senior | 164 | Bloomfield | CT |
| 71 | The Arbella at Bramble Hill | Senior | 123 | Worcester | MA |
| 72 | The Belvedere | Senior | 146 | Williamsville | NY |
| 73 | The Dorian | MultiFamily | | Willamsville | NY |
| 74 | The Gables at Lakeside | MultiFamily | 208 | Kissimmee | FL |
| 75 | The Grove at Stapleton | Senior | | Denver | CO |
| 76 | The Hamilton at Lakeside | MultiFamily | | Kissimmee | FL |
| 77 | The Kenmore | Commercial | | Albany | NY |
| 78 | The Legion | MultiFamily | | Poughkeepsie | NY |
| 79 | The Lodge at BridgeMill | Senior | 144 | Canton | GA |
| 80 | The Lofts at Cobbs Landing | MultiFamily | | Palm Harbor | FL |
| 81 | The Orchards Arlington Highlands | Senior | 180 | Arlington | TX |
| 82 | The Orchards Market Plaza | Senior | | Plano | TX |
| 83 | The Outlook Gwinnett | Senior | | Buford | GA |
| 84 | The Outlook Hamilton | Senior | | Noblesville | IN |
| 85 | The Residences at Monterra Commons | Senior | 175 | Cooper City | FL |
| 86 | The Shoppes at City Station | Commercial | | Troy | NY |
| 87 | The Six at City Station | MultiFamily | 87 | Troy | NY |
| 88 | The Sovana at Stuart | Senior | 182 | Stuart | FL |
| 89 | The Station at City Station | Commercial | | Troy | NY |
| 90 | The Wallkill Living Center | Senior | 136 | Middletown | NY |
| 91 | Union Associates | Commercial | | Albany | NY |
| 92 | United STEP I | Commercial | | Malta | NY |
| 93 | University Heights College Suites | Student | 120/429 beds | Albany | NY |
| 94 | University Partners LLC | Commercial | | Troy | NY |
| 95 | Urbach, Kahn & Werlin Building | Commercial | | Albany | NY |
| 96 | Varick Peterson Homes | MultiFamily | 122 | Newburgh | NY |
| 97 | Village College Suites at NCCC | Student | 86/309 beds | Sanborn | NY |
| 98 | Watertown Industrial Park | Commercial | | Watertown | NY |

Awards

United Group is built on a foundation of excellence, consistently striving to exceed expectations in every endeavor. This commitment is evident in the numerous awards and accolades we have earned over the years, reflecting our dedication to quality, innovation, and industry leadership. These achievements are a testament to the hard work and talent of our team, as well as the trust and loyalty of our clients and partners. By maintaining a relentless focus on excellence, we continue to set the standard for success in our field, ensuring our reputation as a proven leader remains unmatched.

| | | | | | | | | | |
|---|---|---|--|--|---|--|--|--|---|
|  2012 - AMO[®] of the Year United Realty Management Corp |  2016 - Best 55+ Lifestyle Program SUN [®] Program |  2016 - Best 55+ Clubhouse Diamond Oaks Village |  2017 - Top Workplaces United Group |  2017 - Best 55+ Direct Mail Piece Sandalwood Village |  2018 - Top Workplaces United Group |  2018 - Best 55+ IL Community Diamond Oaks Village |  2019 - Top Workplaces United Group |  2019 - AMO[®] of the Year United Plus Property Management |  2019 - Builder of the Year United Group |
|  2019 - Best 55+ Market-Rate Rental Community Alloro at University Groves |  2020 - Top Workplaces United Group |  2020 - Best 55+ Market-Rate Rental Community Arcadia Gardens |  2021 - Top Workplaces United Group |  2021 - Best 55+ Market-Rate Rental Community The Sovana at Stuart |  2021 - Top Workplaces USA United Group |  2021 - Best Green Initiative The Hamilton at Lakeside |  2022 - Top Workplaces United Group |  2022 - Top CEO Michael J. Uccellini |  2022 - Best 55+ MF Community Alloro at University Groves |
|  2022 - Best 55+ IL Community Arcadia Gardens |  2023 - Top Workplaces United Group |  2023 - Top Workplaces USA United Group |  2023 - Best 55+ Marketing Campaign The Orchards |  2024 - Best 55+ Lifestyle Program SUN [®] Program |  2024 - Top Workplaces United Group |  2024 - Top Workplaces USA United Group |  2024 - Best New or Redesigned Logo The Sixty City Station - CRBRA |  2024 - Best New Multi-family Project The Apex at Crossgates - CRBRA |  2024 - AMO[®] of the Year United Plus Property Management |

Award-Winning Management Company



AMO[®] of the Year
(Accredited Management Organization[®])



II. OPERATIONS

Operations Overview

UPPM's operations are built on a foundation of strategic partnerships and a relentless focus on maximizing asset value. We collaborate with a network of the industry's top companies, services, and experts, leveraging their specialized knowledge and resources to ensure seamless operations and superior outcomes for your properties.

At the core of our operational philosophy is robust asset management and financial stewardship. We constantly analyze market conditions and future trends, proactively identifying opportunities to drive growth in Net Operating Income (NOI) and optimize the overall value of your portfolio. Beyond day-to-day management, our team also offers specialized services for ceremonial and large events, ensuring every aspect, from planning to execution, reflects the quality and professionalism synonymous with your properties. Furthermore, our annual Manager's Retreat is a cornerstone of our operational excellence, providing a dedicated forum for comprehensive training, invaluable team building, and a rewarding experience that empowers our property managers to consistently deliver exceptional results. This holistic approach, encompassing everything from vendor management and tenant relations to preventative maintenance and technology integration, guarantees that your properties are managed with unparalleled efficiency and an eye toward sustained success.



- **National partners**
- **Asset management & financials**
- **Ceremonial/Large event services**
- **Manager's Retreat**

National Partners

We are proud to partner with the best in the industry to ensure our clients achieve exceptional results. By collaborating with top-tier professionals, cutting-edge service providers, and innovative organizations, we deliver tailored solutions that maximize performance and drive NOI for our clients. Our strategic partnerships allow us to leverage expertise, advanced technologies, and proven methodologies, ensuring that every project is executed with precision and excellence. Together, we create value and deliver measurable outcomes that support our clients' success and long-term growth.



Asset Management & Financials

The Asset Management team at United Groups is focused on enhancing the strategic, long-term performance of the portfolio. Their primary objective is to drive growth in Net Operating Income through well-planned strategic initiatives. This involves continually evaluating new revenue opportunities and optimizing portfolio performance to ensure sustained income growth. By analyzing current market conditions and future trends, the team identifies and capitalizes on emerging opportunities, ultimately aiming to achieve consistent increases in financial performance and long-term portfolio value.

The team is committed to developing long-term partnerships with key stakeholders, ensuring that we are always aligned with the evolving needs of our clients. By fostering these relationships, the team strengthens its ability to deliver tailored solutions and consistently meet client expectations, driving mutual success.



Ceremonial/Large Event Services

We are equipped to handle every detail of your ceremonial events, from groundbreaking to grand openings and large prospect gatherings. We'll manage everything, including invitation and RSVP coordination, meticulous budget oversight, and comprehensive vendor management for caterers, decorators, live music, entertainment, tents, and linens. We'll also take the lead on public relations and the coordination of local dignitaries, ensuring your event runs seamlessly and makes a lasting impression. Partner with us to guarantee your special occasions are executed flawlessly, leaving you free to focus on your guests and celebrating your milestones.



Ground Breaking Ceremony



Going Vertical Ceremony



Grand Opening / Ribbon Cutting



Large Prospect Event

Manager's Retreat

Every year United Plus Property Management hosts a highly anticipated Manager's Retreat for all our property managers. This annual event serves a triple purpose: providing essential training on relevant current topics, fostering strong team building, and acting as a well-deserved reward, often held at luxurious resorts in desirable locations. A significant portion of the retreat's cost is generously covered by donations from our key partners and vendors, highlighting their commitment to our success. For our milestone 10th annual retreat in 2024, we celebrated in grand style at Walt Disney World, where our managers also benefited from their renowned Disney Institute Training.



Orlando, FL – Disney's Yacht Club Resort
2024



Lake Placid, NY - Crowne Plaza
2015



Cooperstown, NY – The Otesaga
2016



Lake Placid, NY – Whiteface Lodge
2017



Lake George, NY – The Sagamore
2018



Lake Placid, NY – Mirror Lake Inn
2019



At Home – Virtual
2020



Cape Cod, MA – Wequassett Resort
2021



Delray Beach, FL – Opal Grand Resort
2022



Canandaigua, NY – The Lake House
2023



III. LIFESTYLE PROGRAMMING

Lifestyle Overview

There is an abundance of stunning and amenity-rich apartment home communities. What sets UPPM-managed communities apart from others is the attention and focus on the “heartbeat” of our communities, the lifestyle we curate.

Lifestyle refers to the typical way of life of an individual, group, or culture. It encompasses the habits, attitudes, tastes, moral standards, and economic level that together constitute the mode of living of an individual or group. Lifestyle encompasses anything that touches the senses.

Our lifestyle team members are charged with creating events that educate, celebrate, impress, inspire and protect our residents. Their passion and dedication is crucial to the success of our Lifestyle programing.

At the core of our lifestyle programs is the spirit of hospitality. Imagine if your favorite relative came for a visit. What would you do to make their visit memorable? What kind of food and beverages would you serve? What fun things would you do? How would you make them feel special? That is the thought process our team members use to make our events sparkle as we create and capture memories and moments our residents and their families talk about for years to come.

Our lifestyle programming is fluid as the characteristics and expectations of the different demographics morph as the face of seniors, students and families change. We must remain agile to meet the ever changing expectations of our residents, while maintaining the integrity of and commitment to our Lifestyle programs.

Lifestyle is now the biggest topic for owners, investors and developers. There is direct correlation between robust lifestyle programing and the retention rate of residents.

Forward-thinking property managers have always known that the investment they make in tenant experience pays for itself in the form of tenant retention and brand identity. Prior to a groundbreaking study by Kingsley Associates there hasn’t been a way to quantify the return on investment in tenant satisfaction.

Kingsley Associates reported that satisfied tenants are more than three times as likely to renew their leases than dissatisfied ones. The researchers at Kingsley also found that a one-point increase in satisfaction on the Kingsley survey resulted in an 18% lower likelihood of tenants leaving, and the intent to renew increased by 8%. The same one-point increase in satisfaction decreases vacancy by 7%.

Our focus on Lifestyle at United Group has intensified. The creation of a role that provides executive level oversight of our Lifestyle Programs combined with our overall Lifestyle and program specific trainings challenge our team members to be creative and resourceful to take our programing to the next level so we continue to be the benchmark for others in our industry and a sought after 3rd party management company.

Programs



(Senior)



(Student)

Award-Winning Senior Lifestyle Program

At United Plus Property Management, AMO®, we believe in putting our residents’ needs at the **center** of everything we do. That’s why we’ve developed the SUN® Program, a lifestyle program that **revolves around YOU** (the resident) – their health, happiness and well-being.

The SUN® Program entered the national scene by winning the Gold Award for **Best 55+ Lifestyle Program** by the National Association of Home Builders in 2016 and then again in 2024. Since then the program has grown exponentially!

Our nationally-recognized SUN® Program focuses on seven core lifestyle concepts, providing access to a robust selection of classes, clinics, events, outings and learning opportunities designed to keep the resident feeling young, healthy, and socially engaged. The result – a vibrant, connected community that allows them to enjoy an unparalleled 55+ living experience tailored perfectly to their individual wants and needs.

The Program’s Seven Core Lifestyle Concepts:

- 1. Fun & Recreation
- 2. Health & Wellness
- 3. Community & Friendship
- 4. Education & Lifelong Learning
- 5. Finance, Legal & Administrative
- 6. Convenience & Economies
- 7. Safety & Security



2016
Best 55+ Lifestyle Program
National Association of Home Builders



2024
Best 55+ Lifestyle Program
National Association of Home Builders



A LIFESTYLE PROGRAM
CENTERED AROUND YOU!



The Seven Core Lifestyle Concepts



1. Fun & Recreation

At its core, the SUN® Program exists as a resource to help fully enjoy one of the most special times of life. One of the largest roles the program plays in helping achieve that goal is providing plenty of opportunities for fun and entertainment!

- » Happy hours
- » Off-site recreational outings
- » Movie showings
- » Bingo, cards and board games
- » Ice cream socials
- » Pot luck parties
- » Resident appreciation events
- » Paint & Sip



2. Health & Wellness

To fully enjoy a robust, active senior living experience, focusing on both physical and mental well-being is critically important. The program prioritizes offering the tools and resources to stay fit and feel their best!

- » Fitness classes
- » Aqua aerobics
- » Flu shot clinics
- » Health screenings
- » Nutrition education
- » Partnerships with local healthcare partners
- » On-site health fairs



3. Community & Friendship

Fostering a lively community isn't just an important aspect of the program's offerings, it's a cornerstone of our efforts to cultivate the sense of togetherness and social connection central to a healthy, happy lifestyle.

- » Block parties
- » Birthday socials
- » Special interest clubs
- » Holiday parties
- » Happy hours
- » New resident meet and greet
- » Wine-Down Wednesday r family



4. Education & Lifelong Learning

Not only is the continued pursuit of knowledge a key way to stay active and engaged, but it's also an essential piece of cultivating a fulfilling lifestyle. The program offers a diverse selection of learning opportunities.

- » Lunch-and-learn seminars
- » Online learning
- » Educational & cultural outings
- » Craft, cooking, and computer
- » classes
- » Lecture series from local college professors
- » Language classes



5. Finance, Legal & Administrative

We understand that in retirement, our residents often face unfamiliar and sometimes daunting tasks and responsibilities. The program is structured to provide the knowledge and tools to handle these duties with ease.

- » Assistance with understanding and managing financial and legal affairs
- » Access to government benefits
- » Health insurance programs
- » Estate planning
- » Asset management
- » Understanding your taxes



6. Convenience & Economies

By creating strategic partnerships with local shopping, dining and entertainment, the program has put an emphasis on providing residents with ample opportunities to enjoy nearby conveniences and activities.

- » Concierge services to help provide local information and resources
- » Group discounted rates to local programs and services
- » Group transportation to grocery stores, pharmacies, doctor appointments, dining out, and so much more!



7. Safety & Security

Empowering residents with the knowledge and tools needed to look out for themselves is critical in ensuring, not only safety and wellness, but the ability to fully embrace a worry-free senior living experience and maintain independence.

- » Identity theft seminars
- » Fraud/scam protection and education
- » AARP safe driving courses
- » Fire marshal seminar
- » Home health care

Student Lifestyle Program – Live. Learn. Relax.



LIVE.



LEARN.



RELAX.

The Live. Learn. Relax. Program is designed to create an unparalleled living experience for the average college student. Our residents are immersed in a fun, active, and academically supportive environment where there is no shortage of entertainment. Every year, our goal is to create a unique college community that allows residents to expand their horizons without having to leave the comfort of their home away from home. We strive to enhance their living experience by providing an academically supportive atmosphere that also promotes personal wellness, professional development, and social etiquette.

LIVE.



COMMUNITY



CULTURAL

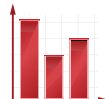


ADVENTURE

LEARN.



PERSONAL
WELLNESS



PROFESSIONAL
DEVELOPMENT



SOCIAL
ETIQUETTE

RELAX.



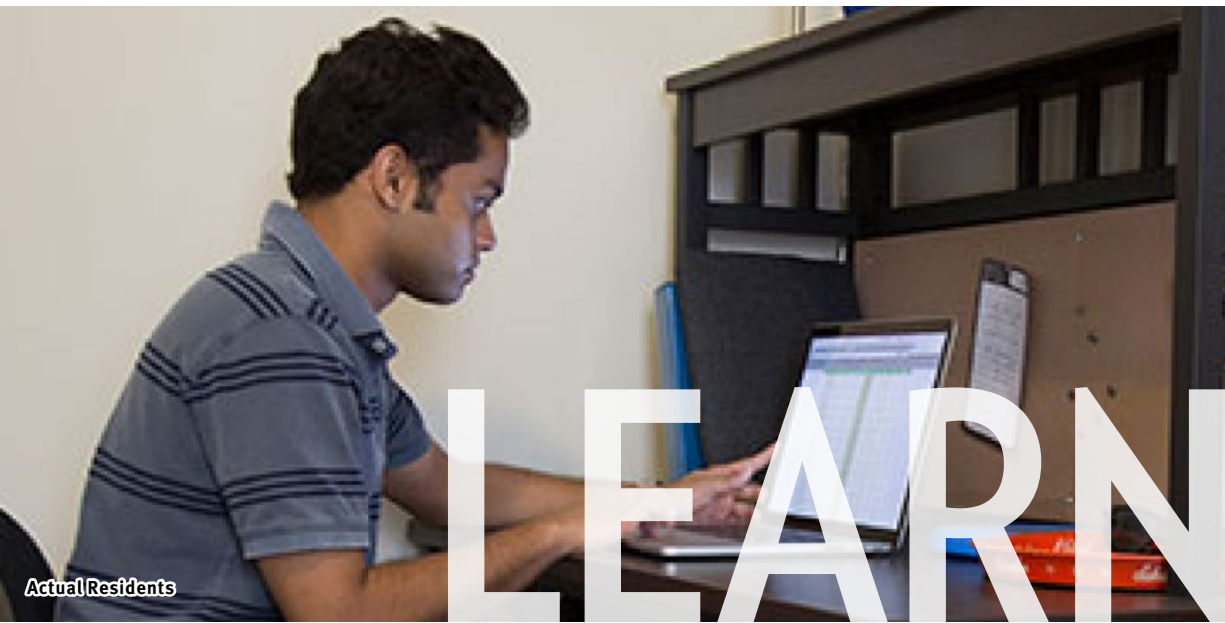
ENTERTAINMENT



GAMES



RESIDENT
APPRECIATION



Resident Rentention

UPPM is dedicated to fostering vibrant, engaged communities, a commitment vividly demonstrated through our award-winning lifestyle programs. This innovative program goes beyond traditional property management, offering residents enriching experiences and opportunities for connection that transform their living space into a true home. By prioritizing resident well-being and satisfaction, we cultivate a strong sense of belonging and provide unparalleled value, leading to consistently higher resident retention rates that significantly surpass the industry average. Happy residents stay longer, and our lifestyle program is the cornerstone of creating those lasting relationships.

We start building this relationship on move-in day with a strategic retain and renew program. Our approach begins with a personalized welcome, and we continue with multiple touchpoints throughout the year, including community events, satisfaction surveys, and exclusive resident-only content. As the renewal period approaches, we offer rewards and incentives, making the decision to stay not just easy, but exciting. This proactive strategy ensures our residents feel valued from the moment they arrive, building a foundation of loyalty that makes them want to renew their lease year after year.

Furthermore, this sustained resident satisfaction directly translates into a significant increase in Customer Lifetime Value (CLV). Longer residencies reduce turnover costs, optimize occupancy rates, and often lead to residents upgrading within our portfolio or referring new tenants. This robust CLV not only enhances our financial performance but also solidifies our reputation as a community-centric property manager, ensuring long-term success and resident loyalty.





IV. SALES

Sales Overview

UPPM employs a meticulously-crafted and highly-effective sales process designed to maximize lease-up success and optimize resident acquisition. Central to our approach is the unwavering commitment to **customizing the experience** for every single prospect, understanding that each individual's needs and aspirations are unique. From the initial inquiry, our dedicated leasing teams engage in an **aggressive contact cadence**, ensuring timely, personalized follow-ups across multiple channels to nurture interest and guide prospects seamlessly through their decision-making journey. This proactive engagement is rigorously measured against well-defined **Key Performance Indicators (KPIs)**, with a sharp focus on optimizing our traffic-to-tour conversion rates and, critically, our tour-to-close percentages, allowing for real-time adjustments and continuous improvement. Our leasing professionals are not just salespeople; they are highly trained community ambassadors, empowered by our proprietary **School of Leasing**, an advanced training program that instills best practices in sales psychology, relationship building, and product knowledge. Furthermore, to accelerate momentum in new developments, we strategically leverage our innovative **SUN® Blazers Program**, offering compelling incentives to early adopters who recognize the value and vision of our emerging communities. This comprehensive, data-driven, and people-centric sales methodology consistently delivers exceptional results, a testament to which will be evident in the historical lease-up data we will present.



- **Customized experience**
- **Aggressive contact cadence**
- **Key performance indicators**
- **Mystery Shop Program**
- **School of Leasing**
- **SUN® Blazers Program**

Key Performance Indicators

At UPPM, our commitment to excellence is underpinned by a rigorous, data-driven approach, where we adhere strictly to our Key Performance Indicators (KPIs). We understand that effective measurement isn’t one-size-fits-all; therefore, these KPIs are dynamically tailored based on several critical factors. This includes the product type—whether it’s Independent Living, Active Adult, Multifamily, or Student housing—the stage of the community’s lifecycle (new construction/lease-up, stabilized, or even struggling assets), and seasonality, as illustrated in the accompanying chart.

Our comprehensive set of KPIs covers every stage of the sales funnel, from initial interest to signed lease. These include total traffic, qualified leads (which is our refined measure of qualified traffic), the percentage of qualified traffic that converts to leads, the number of tours conducted, the traffic-to-tour rate, the total number of leases signed, the tour-to-close rate, and finally, the overall traffic-to-close conversion. By meticulously analyzing each of these metrics, we gain granular insights that inform our strategy. This continuous analysis allows us to swiftly identify areas needing corrective action or opportunities for supportive behaviors, ensuring our sales and marketing efforts are consistently optimized for maximum performance and efficiency across our diverse portfolio.

| | Traffic | Qualified Lead Rate | Leads (Qualified Traffic) | Lead-to-Tour Rate | Tours | Tour-to-Lease Rate | Leases | Lead-to-Lease Rate |
|------------------------|---------|---------------------|------------------------------|-------------------|-------|--------------------|--------|--------------------|
| Senior Lease-Up | 120-170 | 66% | 80-112 | 25% | 20-28 | 35% | 7-10 | 8.75% |
| Senior Stabilized | 40-50 | 90% | 36-44 | 25% | 9-11 | 35% | 3-4 | 8.75% |
| Student Summer Turn | XXX | XX% | XXX | XX% | XX | XX% | XX | XX% |
| Student Stabilized | XXX | XX% | XXX | XX% | XX | XX% | XX | XX% |
| Multifamily Lease-Up | 120-160 | 75% | 90-120 | 33% | 30-40 | 50% | 15-20 | 15% |
| Multifamily Stabilized | 40-64 | 75% | 30-48 | 33% | 10-16 | 50% | 5-8 | 15% |

School of Leasing

At UPPM, our commitment to sales excellence is embodied in the School of Leasing, an unparalleled internal training program meticulously developed and refined over the past decade. This comprehensive curriculum instills our proprietary best practices, empowering our leasing consultants to become the most aggressive and elite sales agents in the industry. The program dives deep into essential concepts, ensuring our teams are not just knowledgeable, but true market experts. Consultants gain a profound understanding of housing market trends, learn to cultivate invaluable relationships with referral partners, and master impactful grassroots marketing and outreach efforts to generate high-quality leads. Furthermore, they receive advanced training in expert dashboard management, leveraging data to inform their strategies, and hone their skills in custom-tailored lead nurturing, ensuring every prospective resident receives a personalized and compelling experience. The School of Leasing is more than just training; it's a continuous development platform that transforms talent into top-tier performance, directly contributing to our consistent lease-up success.



Topics Covered

- » **Current housing market trends** and overcoming home sale delays
- » **Referral Partners** and how to best leverage them
- » **Grassroot marketing** and cultivating an “Outreach Grid”
- » **Daily sales strategy** by optimizing dashboard management and staff morning standup meetings
- » **OneDay® videos** used for personalized follow-up
- » **UPPM’s KPI benchmarks** for target performance metrics
- » **Follow-up cadence** for abbreviating the sales cycle

Mystery Shop Program

Quarterly, each asset is shopped for internet inquiries, phone inquiries, and in person. Each Field Sales and Marketing Manager monitor their portfolio and coaches on the shops on completion, in real time. Roll up reporting is done monthly, and quarterly.

- » **Purpose:** Provides a structured and comprehensive platform for mystery shopping to assess and enhance the performance of our communities.
- » **Customization:** United shops have been tailored by product type with each ensuring that our universal key differentiator, our commitment to hospitality-based lifestyle programs, is appropriately represented by our team members.
- » **Real-Time Reporting:** Offers immediate access to detailed results, analytics, and insights, making it easy to identify trends and areas for improvement.
- » **Consistency:** Ensures standardized evaluation across all properties, maintaining a uniform approach to service excellence.
- » **Training Integration:** Connects seamlessly with Grace Hill's training solutions, allowing for targeted coaching and development based on shop results to be memorialized and appropriately rewarded.



validate[✓] by  Grace Hill[®]

Timely, unbiased performance assessments

See your property and team through the eyes of your prospects and residents with Validate from Grace Hill, an easy-to-administer, discrete mystery shopping program designed specifically for multifamily property managers like you! Choose from 12 different shop types, including:



Phone



Online



Onsite



Combined

SUN® Blazers Program – Igniting New Communities

The SUN® Blazers Club is a proprietary program meticulously developed by UPPM to dramatically jump-start leasing efforts in our new senior developments. This innovative initiative directly addresses and overcomes common hurdles faced by early adopters: the initial quiet of a new community, ongoing construction in adjacent areas, and the natural desire for trust in a new property management company. We’ve found this program to be an invaluable accelerator for our leasing efforts, consistently enabling us to surpass proforma goals without resorting to traditional, often costly, move-in specials.

Our unique program offerings are designed to ease the significant decision of choosing a new home, creating a sense of urgency through the promise of high-value, yet relatively low-cost services. Prospective residents find their choice made simpler and more appealing with benefits such as pack and move service reimbursement, priority apartment selection, a deep clean at lease renewal, convenient guest suite passes, and distinctive name tags, among many other thoughtful amenities.

Crucially, the SUN® Blazers Club fosters an immediate sense of camaraderie and community among these foundational members, keeping them actively engaged and invested even during the construction phase. This has proven remarkably successful in retaining residents, even in the face of unexpected construction delays. Furthermore, early social events specifically for SUN® Blazers provide a powerful closing tool: we invite “hot leads” to meet these engaged members, who enthusiastically serve as our personal ambassadors, sharing their positive experiences and reinforcing the value of joining our growing community.

The chart to the right is a sample ►

| Level | Benefit | Cost |
|---|----------------------------------|----------|
| Diamond <i>(First 15 Residents)</i> | Priority Apartment Selection | \$0 |
| | Designated Parking Space | \$50 |
| | Pack and Move Service | \$1,000 |
| | SWAG Box | \$75 |
| | 1 year anniversary deep clean | \$150 |
| | 8 training sessions or pedicure | \$280 |
| | Sun Blazer Meet and Greet | \$25 |
| | Three 2-night guest suite passes | \$0 |
| | VIP Invitation to Grand Opening | \$0 |
| | Sun Blazer Entertainment Card | \$0 |
| | Name Tag | \$10 |
| | Sub Total | \$1,590 |
| Level Total (x15 residents) | | \$23,850 |
| Platinum <i>(Next 15 Residents)</i> | Priority Apartment Selection | \$0 |
| | Designated Parking Space | \$50 |
| | Pack and Move Service | \$750 |
| | SWAG Box | \$75 |
| | 4 training sessions or pedicures | \$140 |
| | Sun Blazer Meet and Greet | \$25 |
| | Two 2-night guest suite passes | \$0 |
| | VIP Invitation to Grand Opening | \$0 |
| | Sun Blazer Entertainment Card | \$0 |
| | Name Tag | \$10 |
| | Sub Total | \$1,050 |
| Level Total (x15 residents) | | \$15,750 |
| Gold <i>(Next 15 Residents)</i> | Priority Apartment Selection | \$0 |
| | Designated Parking Space | \$50 |
| | Pack and Move Service | \$500 |
| | SWAG Box | \$75 |
| | 2 Training Sessions or Hair Cuts | \$70 |
| | Sun Blazer Meet and Greet | \$25 |
| | One 2-night guest suite passes | \$0 |
| | VIP Invitation to Grand Opening | \$0 |
| | Sun Blazer Entertainment Card | \$0 |
| | Name Tag | \$10 |
| | Sub Total | \$730 |
| Level Total (x15 residents) | | \$10,950 |
| Tier Total | | \$50,550 |

A group of people are gathered around a table covered with a white cloth. On the table is a large, colorful wheel with various handwritten notes and a small container of pens. The people are engaged in conversation, and the setting appears to be a community or office event.

V. MARKETING

Marketing Overview

At the core of our success is a full-service, in-house marketing team that delivers industry-leading traffic numbers via strategic and results-driven solutions tailored to each community's unique needs. For owners struggling with underperforming assets, we offer a comprehensive marketing approach designed to boost visibility, drive qualified leads, and increase occupancy. Each property benefits from a customized marketing plan that includes competitor analysis, rental rate recommendations, clearly defined value propositions, target audience profiles, and demographic insights. We identify the right marketing channels and craft messaging that resonates – maximizing reach and return.

Our process includes rolling monthly 90-day marketing plans, which analyze performance from the previous month while laying out actionable strategies for the next three. Every initiative is backed by advanced reporting with ROI and KPI analysis by lead source, paired with in-depth recommendations prioritized by urgency and impact. Our branding services cover everything from market studies and property naming to logo creation, taglines, style guides, websites, and collateral packages. Additionally, our in-house team delivers ongoing support through graphic and web design, public relations, copywriting, marketing technology management, and paid media execution. We also provide a proprietary social media program called Socially FIT, where each property is evaluated monthly and scored out of 100 to ensure best practices are being followed and digital presence is optimized. This holistic and data-driven marketing engine consistently positions our properties—and their owners—for long-term growth and performance.



- **Comprehensive marketing plans**
- **Rolling 90-day plans**
- **Industry-leading traffic generation**
- **Advanced ROI analysis**
- **In-house agency services**
- **Branding package**
- **Socially FIT™ program**

Comprehensive Marketing Plans

UPPM employs a two-tiered marketing plan approach for every property we manage, ensuring both a robust initial launch and continuous, adaptive optimization. The first is a comprehensive initial marketing plan, meticulously crafted after a deep dive into the property’s specific market. This involves a thorough analysis of the 5-mile radius and the broader Metropolitan Statistical Area (MSA), defining precise target demographics and audience personas based on market study, psychographics, and behavior analysis. We then establish clear property positioning and a compelling value proposition, allocate a strategic budget, identify the most effective marketing channels to reach our defined demographics, and develop impactful messaging. Complementing this is our rolling 90-day marketing plan, a dynamic strategy that looks back at the effectiveness of the previous month’s efforts, allowing for agile forward adjustments. This ongoing plan incorporates evolving geolocation trends of traffic and move-ins to refine targeting, adjusts messaging to maintain relevance, plans and promotes upcoming on-site events, and meticulously reviews the monthly outreach grid, ensuring continuous engagement and maximizing traffic generation.

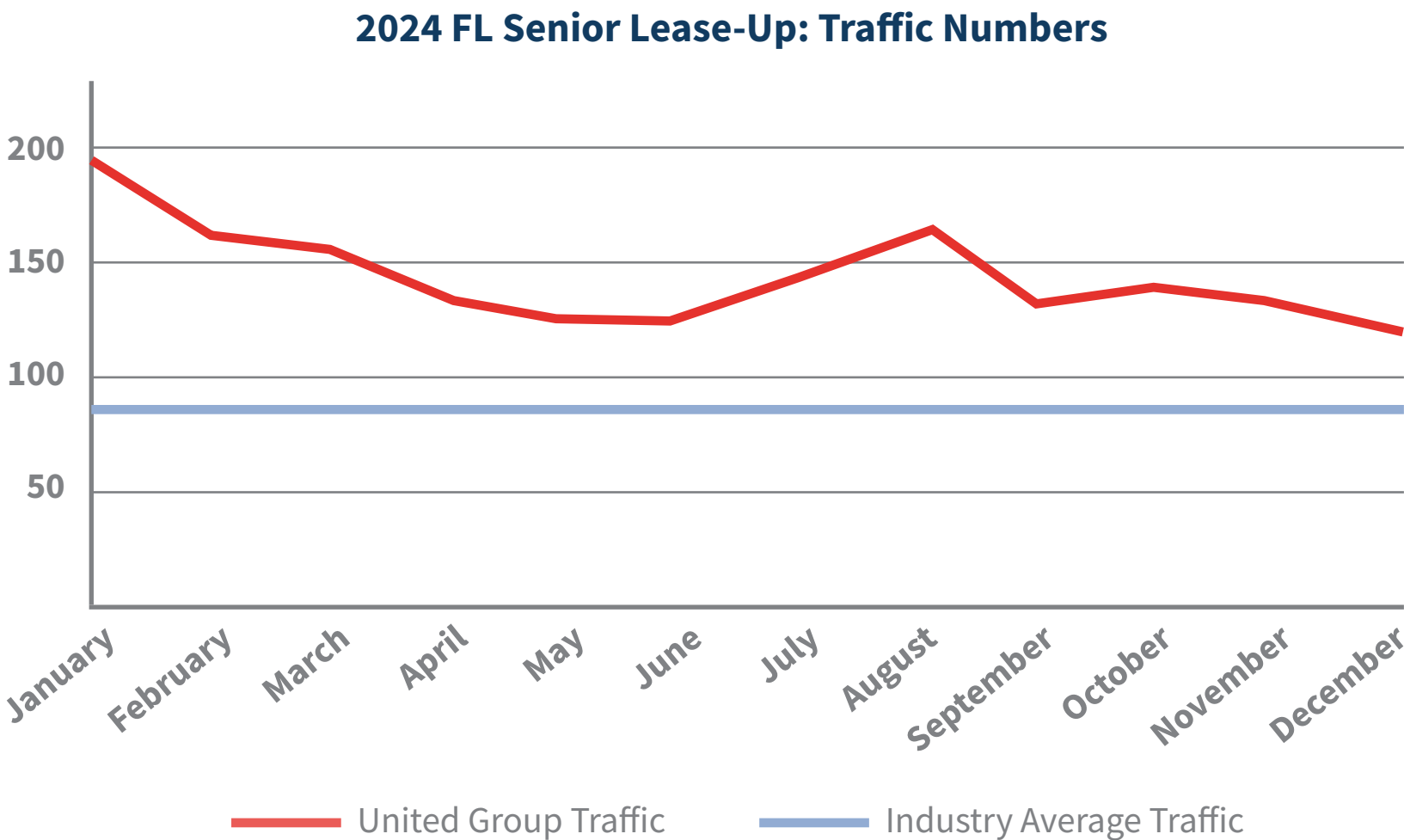
Initial Property Marketing Plan:

- » Executive Summary
- » Market Study
- » Target Demographics & Audience Personas
- » Positioning: Differentiation & Value Proposition
- » Budget
- » Marketing Channels
- » Messaging & Brand Identity
- » Social Media: Socially FIT™ Implementation
- » Public Relations & Reputation Management
- » Outreach

Rolling 90-Day Marketing Plans:

- » Previous Month Analysis & Forward Adjustments
- » Geolocation Trend of Move-Ins for Location Targeting
- » Messaging
- » ILS Audit
- » Referrals: Professional & Resident
- » On-Site Events
- » Marketing Channels
 - ILS Listings
 - Paid Search (SEM)
 - Paid Social
 - Organic Social
 - Print Advertising
 - Direct Mail
- » Outreach Grid

Industry-Leading Traffic Generation



UPPM stands above the rest in terms of revolutionizing marketing traffic generation through hyper-customized strategies. Unlike competitors who rely on generic plans for entire product types, we delve deep into the unique characteristics of each individual property’s market and nuanced target demographic. This meticulous approach allows us to craft bespoke marketing campaigns that resonate precisely with the local demographic and leverage the most effective channels, ensuring your property captures maximum attention and attracts the ideal tenants.

Marketing Reporting

| Lead Source | January | | | | | | February | | | | | | March | | | | | | Totals | | | | | |
|-----------------------|----------|-------|-------|--------|---------------|----------------|----------|-------|-------|--------|---------------|----------------|----------|-------|-------|--------|---------------|----------------|----------|-------|-------|--------|---------------|----------------|
| | Cost | Leads | Tours | Leases | Cost Per Lead | Cost Per Lease | Cost | Leads | Tours | Leases | Cost Per Lead | Cost Per Lease | Cost | Leads | Tours | Leases | Cost Per Lead | Cost Per Lease | Cost | Leads | Tours | Leases | Cost Per Lead | Cost Per Lease |
| ApartmentGuide.com | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - |
| Apartment List | \$39 | 8 | 0 | 0 | \$5 | - | \$39 | 6 | 0 | 0 | \$7 | - | \$39 | 6 | 0 | 0 | \$7 | - | \$117 | 20 | 0 | 0 | \$6 | - |
| Apartments.com | \$1,429 | 14 | 0 | 0 | - | - | \$1,429 | 12 | 0 | 0 | \$119 | - | \$1,429 | 9 | 0 | 1 | \$159 | \$1,429 | \$4,287 | 35 | 0 | 1 | \$122 | - |
| A Place for Mom | \$0 | 19 | 5 | 0 | \$0 | - | \$0 | 17 | 2 | 0 | \$0 | - | \$0 | 14 | 3 | 0 | \$0 | - | \$0 | 50 | 10 | 0 | \$0 | - |
| Caring.com | \$3,016 | 18 | 0 | 1 | \$168 | \$3,016 | \$0 | 19 | 0 | 0 | \$0 | - | \$0 | 17 | 3 | 0 | \$0 | - | \$3,016 | 54 | 3 | 1 | \$56 | \$3,016 |
| Collateral | \$200 | 8 | 1 | 1 | \$25 | \$200 | \$0 | 7 | 0 | 0 | - | - | \$200 | 8 | 0 | 1 | \$25 | \$200 | \$400 | 23 | 1 | 2 | \$17 | - |
| Direct Mailer | \$1,500 | 6 | 1 | 0 | - | - | \$140 | 7 | 3 | 1 | \$20 | \$140 | \$3,500 | 12 | 4 | 0 | \$292 | - | \$5,140 | 25 | 8 | 1 | \$206 | \$5,140 |
| Email Newsletter | \$0 | 5 | 1 | 0 | \$0 | - | \$0 | 4 | 1 | 0 | - | - | \$0 | 8 | 0 | 0 | \$0 | - | \$0 | 17 | 2 | 0 | \$0 | - |
| Facebook | \$0 | 8 | 0 | 0 | \$0 | - | \$0 | 12 | 0 | 0 | - | - | \$0 | 9 | 1 | 0 | \$0 | - | \$0 | 29 | 1 | 0 | \$0 | - |
| Facebook Lead Ads | \$648 | 12 | 1 | 0 | \$54 | - | \$650 | 10 | 0 | 0 | \$65 | - | \$650 | 10 | 3 | 0 | \$65 | - | \$1,948 | 32 | 4 | 0 | \$61 | - |
| Flyer | \$100 | 0 | 3 | 0 | - | - | \$100 | 6 | 2 | 0 | \$17 | - | \$100 | 7 | 0 | 0 | \$14 | - | \$300 | 13 | 5 | 0 | \$23 | - |
| Google | \$300 | 17 | 8 | 2 | \$18 | \$150 | \$300 | 11 | 6 | 2 | \$27 | \$150 | \$300 | 13 | 5 | 1 | \$23 | \$300 | \$900 | 41 | 19 | 5 | \$22 | \$180 |
| Google Ads | \$2,500 | 11 | 2 | 0 | \$227 | - | \$3,500 | 15 | 5 | 1 | \$233 | \$3,500 | \$3,000 | 14 | 5 | 0 | \$214 | - | \$9,000 | 40 | 12 | 1 | \$225 | \$9,000 |
| LocalIQ | \$0 | 0 | 0 | 0 | - | - | \$2,000 | 11 | 0 | 0 | \$182 | - | \$0 | 0 | 0 | 0 | - | - | \$2,000 | 11 | 0 | 0 | \$182 | - |
| Chamber of Commerce | \$425 | 1 | 0 | 0 | \$425 | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$425 | 1 | 0 | 0 | \$425 | - |
| My Care Finders | \$0 | 1 | 0 | 0 | \$0 | - | \$3,414 | 8 | 0 | 1 | - | \$3,414 | \$0 | 0 | 0 | 0 | - | - | \$3,414 | 9 | 0 | 1 | \$379 | \$3,414 |
| Sarasota Observer | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - |
| Outreach | \$200 | 1 | 1 | 0 | \$200 | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 6 | 0 | 0 | - | - | \$200 | 7 | 1 | 0 | \$29 | - |
| Property Website | \$200 | 10 | 5 | 1 | \$20 | \$200 | \$200 | 9 | 0 | 1 | \$22 | \$200 | \$200 | 9 | 2 | 1 | \$22 | \$200 | \$600 | 28 | 7 | 3 | \$21 | \$200 |
| Professional Referral | \$0 | 9 | 6 | 0 | \$0 | - | \$2,192 | 5 | 3 | 2 | \$438 | \$1,096 | \$0 | 4 | 4 | 0 | \$0 | - | \$2,192 | 18 | 13 | 2 | \$122 | \$1,096 |
| Rent.com | \$1,396 | 2 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$1,396 | 2 | 0 | 0 | - | - |
| Resident Referral | \$0 | 3 | 3 | 0 | \$0 | - | \$1,500 | 3 | 3 | 1 | \$500 | \$1,500 | \$1,500 | 3 | 2 | 1 | \$500 | \$1,500 | \$3,000 | 9 | 8 | 2 | \$333 | \$1,500 |
| Herald-Tribune | \$2,000 | 4 | 2 | 0 | \$500 | - | \$2,000 | 8 | 8 | 0 | \$250 | - | \$2,000 | 5 | 8 | 0 | \$400 | - | \$6,000 | 17 | 18 | 0 | \$353 | - |
| Senior Blue Book | \$2,500 | 11 | 6 | 2 | \$227 | \$1,250 | \$2,500 | 10 | 6 | 0 | - | - | \$2,500 | 8 | 0 | 0 | \$313 | - | \$7,500 | 29 | 12 | 2 | \$259 | \$3,750 |
| Senior Living Guide | \$0 | 0 | 0 | 0 | - | - | \$355 | 6 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$355 | 6 | 0 | 0 | - | - |
| Seniorly | \$0 | 5 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 1 | 0 | 0 | \$0 | - | \$0 | 6 | 0 | 0 | \$0 | - |
| Signage | \$150 | 10 | 4 | 1 | \$15 | - | \$266 | 7 | 2 | 0 | \$38 | - | \$0 | 6 | 2 | 2 | \$0 | - | \$416 | 23 | 8 | 3 | \$18 | - |
| SUN Program Website | \$0 | 0 | 0 | 0 | - | - | \$0 | 1 | 0 | 0 | \$0 | - | \$0 | 2 | 0 | 0 | - | - | \$0 | 3 | 0 | 0 | \$0 | - |
| Van Signage | \$0 | 0 | 0 | 0 | - | - | \$0 | 0 | 0 | 0 | - | - | \$0 | 1 | 0 | 0 | - | - | \$0 | 1 | 0 | 0 | - | - |
| Zillow Network | \$1,138 | 9 | 0 | 0 | \$126 | - | \$1,138 | 10 | 3 | 0 | - | - | \$1,138 | 4 | 0 | 0 | \$285 | - | \$3,414 | 23 | 3 | 0 | \$148 | - |
| TOTALS | \$17,741 | 192 | 49 | 8 | \$92 | \$2,218 | \$21,723 | 204 | 44 | 9 | \$106 | \$2,414 | \$16,556 | 176 | 42 | 7 | \$94 | \$2,365 | \$56,020 | 572 | 135 | 24 | \$98 | \$2,334 |

Sample property and data – ROI analysis by source, prior 3 months

Data Points Analyzed:

- » Avg. Cost Per Lead
- » Avg. Cost Per Lease
- » Top Lead Sources
- » Top Tour Sources
- » Top Lease Sources
- » Socially FIT Score
- » Digital Advertising
 - Impressions
 - CPM (Cost Per Thousand (\$)) Impressions
 - Clicks
 - CTR (Click Through Rate (%))
 - Conversions
 - CPA (Cost Per Acquisition (\$))

Branding

Our branding services offer a comprehensive process designed to elevate your property’s identity and market presence. We begin with an in-depth **market study** to understand the unique landscape, identify optimal positioning, and pinpoint key differentiators. This foundational research informs every subsequent step, including the strategic **naming of the property** that resonates with its target audience and market niche. We then move into the creative phase, developing a distinctive **logo design**, a memorable **tagline**, and a meticulous **style guide**. This guide is your brand’s bible, outlining precise **color palettes**, **typography**, various logo versions, complementary **textures**, and **design elements**. To ensure consistent and impactful execution, we also provide application mockups, showcasing how your brand comes alive across various mediums. Our services extend to **website design**, crafting an online presence that is both visually stunning and highly functional, as well as the creation of essential print **collateral** and engaging **promotional items**, all meticulously aligned with your new, powerful **brand identity**.

Brand Textures

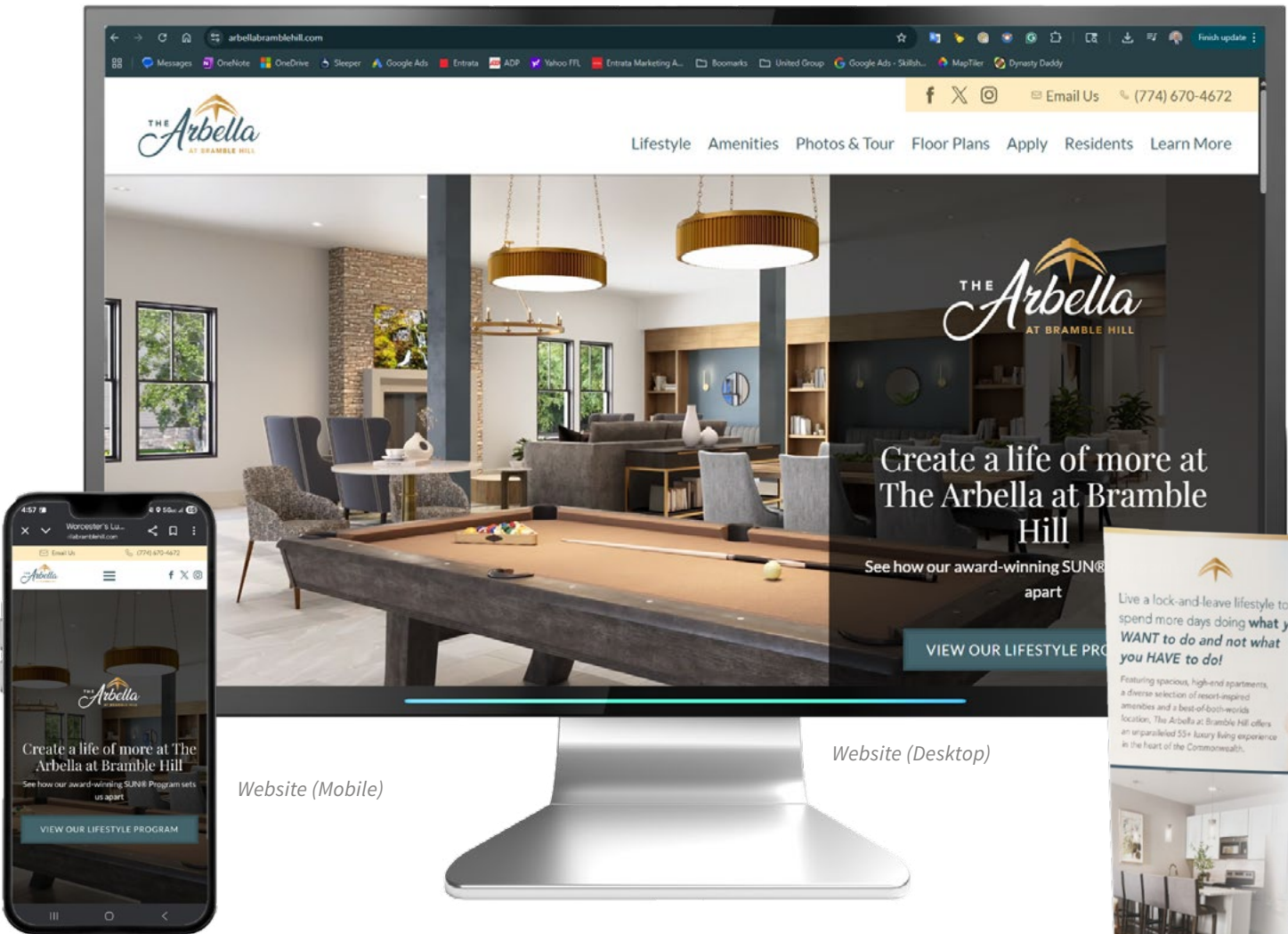


Primary Logo



Color Palette

| DARK TEAL | BROWN | DARK GOLD | GOLD | SAND | LIGHT TEAL |
|--|--|--|---|---|---|
| HEX: #406284 RGB: 64, 98, 110, 1 CMYK: 42, 11, 0, 37 | HEX: #776663 RGB: 119, 107, 99 CMYK: 0, 10, 17, 53 | HEX: #d4962c RGB: 218, 158, 44 CMYK: 0, 28, 80, 15 | HEX: #f3c982 RGB: 243, 201, 130 CMYK: 0, 17, 4, 5 | HEX: #e6dcd3 RGB: 234, 220, 211 CMYK: 0, 0, 4, 12 | HEX: #a6c0b6 RGB: 98, 176, 182 CMYK: 46, 0, 0, 29 |



Website (Mobile)

Website (Desktop)

Brochure

Marketing Services

Our in-house marketing team functions as a full-service internal ad agency, providing an expansive suite of specialized services designed to maximize your property’s exposure and success. This dedicated team handles everything from graphic design and web design to strategic public relations and compelling copywriting. We also manage event planning, curate engaging social media content, produce high-quality video productions, and leverage cutting-edge marketing technologies. Our expertise extends to optimizing paid search campaigns, overseeing print production, conducting in-depth data mining, media buying, managing ILS (Internet Listing Service) platforms, coordinating impactful signage, and proactively shaping reputation management. Having these marketing capabilities at your fingertips keeps you a step ahead of the competition



Creative Services

- » Graphic Design
- » Website Design
- » Copywriting
- » Video Production
- » Print Production (In-house)
- » Photography & Videography
- » Media Buying
- » Content Creation



PR & Communications

- » Public Relations
- » Event Management
- » Email Marketing
- » Reputation Management
- » Media Contact Management
- » Property Newsletters



Digital Marketing

- » Paid Search & Display Advertising
- » SEO
- » Organic Social (Socially FIT™)
- » Paid Social
- » Geofencing
- » OTT/CTV Live Streaming Ads
- » ILS Management



Traditional Marketing

- » Direct Mail Campaigns
- » Radio
- » Television
- » Billboard
- » Print Advertising
- » Outreach / Grassroots Marketing
- » Signage
- » Sponsorships



Marketing Technologies

- » Marketing Automation
- » AI
- » Text / Email / Video Lead Nurturing Campaigns
- » Lead Source Management



Data & Analysis

- » Market Research
- » Google Analytics
- » ROI + KPI Analysis
- » Geolocation Trends

Socially F.I.T.™ – Industry-Leading Best Practices

Purpose

UPPM’s Socially F.I.T.™ program details best practices for posting on each social media platform and evaluates the effectiveness via a monthly scorecard for every property’s social media activity. Through strategic social media marketing campaigns and continuous online interaction, our properties produce an industry-leading social experience for existing residents, engage our target audiences, and ultimately drive traffic to our properties.

Measuring Outcomes

Properties that are “Socially Fit” (on a monthly rolling basis) score a 95% based on the following metrics:

- » Posting frequency
 - » Response times
 - » Review quality
 - » Use of hashtags
 - » Spelling and grammar
 - » Image and video quality
 - » Tagging other businesses
 - » Location check-ins
- » Advanced metric bonus points given for:
 - Impressions
 - Engagements
 - Click Through Rate (CTR)
 - Net Audience Growth
 - Cross-Network Acquisition



VI. ACCOUNTING

Accounting Overview

UPPM offers comprehensive accounting services designed to provide complete financial oversight and strategic guidance for your real estate investments. Beyond meticulous bookkeeping, which encompasses the management of all financial transactions, accurate depreciation calculations, and precise portfolio valuations, we provide expert budgeting and insightful cash flow analysis to optimize performance. Our services extend to rigorous financial audits, in-depth financial analysis including loan covenant analysis, sales analysis, sources and uses of funds, broker's opinion of value (BOV), and thorough assumption vetting.

We also specialize in investor services, proforma creation and advising, and robust risk management strategies to safeguard your assets. Every one of UPPM's properties has a dedicated Property Accountant that is the financial expert for that property. We ensure all financial reporting is transparent, compliant, and tailored to support informed decision-making and maximize the profitability of your properties.





VII. HUMAN RESOURCES

Human Resources Overview

Our Human Resources team serves as the vital backbone of our organization, meticulously ensuring that every facet of our operations remains in full compliance with the evolving landscape of labor laws, regulations, and internal policies. From crafting clear employee handbooks and conducting essential training, to diligently managing compensation, benefits, and employee relations, they proactively mitigate risks and safeguard our business. This unwavering commitment to legal adherence and ethical practices is not merely about avoiding penalties; it's about fostering a fair, safe, and productive environment that enables our entire organization to thrive and confidently pursue its business objectives.

The functions they serve include:

- » Recruitment and talent acquisition
- » Benefits and wellness
- » Performance management
- » Recognition and support
- » Payroll administration
- » Professional development
- » Training
- » Employee engagement
- » Policy administration
- » On/Off boarding

Values

- » **Community:** We know how essential community is to overall wellness. That's why we're committed to creating a community where our employees, customers, partners, and stakeholders all thrive.
- » **Impact:** When you work at United Group, you're not just doing busy work. Your role is rewarding and impactful so that when you give, you get it back.
- » **Balance:** Our mission of creating better lives doesn't stop at residents or investors — it applies to our employees too. To uphold our mission, we provide the support needed for an ideal work-life balance.
- » **Longevity:** Since 1972, we've been changing people's lives for the better. Investors, employees, and other stakeholders have been with the company longer than our younger employees have even been alive.

Awards

United Group has been named “Top Work Places Albany” nine years in a row, and “Top Work Places USA” five years in a row.



Training & Professional Development - United University

United University is a comprehensive training program designed to provide a foundation of knowledge and skills as well as opportunities to learn and grow as employees. The program is a combination of online courses, instructor-led training, and field work. The program exists to provide exceptional training and tools to motivate, promote and support employee development and organizational effectiveness through curricula that are designed to meet individual needs and objectives for overall success. United University strives to enhance learning and development as the means for creating a better workplace, providing extraordinary customer service, and for promoting within.



Degrees

- » **Associate Degree:** 59 Courses | Upon completion, students will be well-versed to handle the daily tasks of leasing and marketing to prospective residents. They will be able to handle and manage conflict and operate efficiently and safely.
- » **Bachelor's Degree:** 36 Courses | Upon completion, students will be well-versed to handle the daily tasks of leasing and marketing to prospective residents. They will be able to handle and manage conflict and operate efficiently and safely. Students will have a better understanding on how to run a property.
- » **Master's Degree:** 8 Courses | Upon completion, students will be able to effectively market and lease to prospective residents and operate a property. They will have an understanding of property financials, capable leadership skills, and knowledge of the greater-real estate industry.
- » **PhD:** 5 Courses | Upon completion, students will be experts in marketing, leasing, and operating a property. Students' financial knowledge will be significant, leadership skills will be excellent, and they will be prepared to further advance within the real estate industry.

United Group Company Culture

Our company thrives on a vibrant culture that celebrates our collective spirit, emphasizing knowledge, professionalism, charitable giving, and a fun, engaging work environment. We foster a community where achievements are celebrated, and every team member feels empowered to contribute to both our success and the well-being of others.

We give our team the opportunity to:



Be Charitable

United Group fosters a culture of compassion, making a lasting positive impact on the lives of individuals and the community. Exemplifying dedication to the community through impactful fundraisers and meaningful initiatives that uplift and empower those in need.

- » Susan G. Komen Walk / Making Strides
- » Against Breast Cancer fundraising
- » Alzheimer’s Walk
- » Toys for Tots
- » Go Red for Women
- » Habitat for Humanity
- » Ronal McDonald House
- » Things of My Very Own
- » 518 Day: Community Baby Shower



Be Well

United Group places a paramount emphasis on employee well-being, evidenced by our robust investment in comprehensive health and wellness programs. Through tailored initiatives and resources, we nurture a thriving workforce, prioritizing their physical and mental health for sustained success.

- » UGOC Walking Challenge
- » Health & Wellness Fair
- » Corporate Biggest Loser & Maintain Don’t Gain Competition
- » Water Challenge
- » Mental Health – UCM Mental Health (SAM by UCM); Calm App Subscription



Be Celebrated

United Group takes pride in fostering a culture of recognition, celebrating employee achievements through regular awards, acknowledgments, and appreciation events. By spotlighting individual and team successes, we cultivate a motivated and empowered workforce dedicated to continuous excellence.

- » Milestone Anniversary Celebrations
- » Annual Award Recognition
- » Employee Appreciation Day
- » Birthday Cards
- » Maintenance Appreciation Week



Be Knowledgeable

United Group takes pride in fostering a culture of recognition, celebrating employee achievements through regular awards, acknowledgments, and appreciation events. By spotlighting individual and team successes, we cultivate a motivated and empowered workforce dedicated to continuous excellence.

- » United University
- » School of Leasing
- » Annual Managers’ Retreat
- » HR Summit
- » Success Model
- » IREM



Be Fun

United Group fosters a lively work environment through team-building activities and events, promoting creativity and camaraderie for an enjoyable workplace experience.

- » National Holiday Celebrations
- » Fun at Work Day
- » March Madness Competition
- » Summer Picnics
- » Summer Hours (Corporate Scheduling)
- » Group outing



VIII. FACILITIES MANAGEMENT

Facilities Management Overview

The Facilities Management team at United Groups is dedicated to ensuring the long-term operational efficiency and safety of the portfolio. Through a comprehensive preventative maintenance approach, the team proactively addresses potential issues before they arise, minimizing disruptions and extending the life of assets. This involves regular inspections, scheduled maintenance, and the prompt identification of areas requiring attention, all aimed at reducing operational costs and enhancing the overall performance of the portfolio.

In addition to maintenance, the team is focused on optimizing the functionality of each community, ensuring they meet the highest standards of safety, sustainability, and tenant satisfaction. The team continually evaluates new safety products, technologies, and protocols to ensure we remain at the forefront of industry advancements, actively preserving asset value and reducing risk. By leveraging industry best practices and staying ahead of evolving regulatory requirements, the team works to create a safe and reliable environment for both tenants and stakeholders, contributing to the long-term value and success of the properties managed.



Maintenance and Facilities Management Capabilities

Preventive Maintenance: Proactive Solutions for Commercial Facilities

- » At United, preventive maintenance is at the core of our services. We understand that a well-maintained facility is key to your business’s success, and we focus on proactively addressing potential issues before they disrupt operations.
- » Our preventive maintenance programs are tailored to meet the needs of your commercial facilities, ensuring that HVAC systems, electrical infrastructure, plumbing, elevators, and common areas are inspected and serviced regularly to avoid costly downtime.
- » Through regular inspections and scheduled service, we keep your systems running smoothly, enhancing operational efficiency and reducing the need for emergency repairs.

Corrective Maintenance: Swift and Reliable Response

- » Even with proactive care, unexpected issues can arise. When they do, we pride ourselves on rapid response times to minimize disruptions to your commercial operations.
- » We offer 24/7 emergency support, ensuring that any facility-related issues—whether electrical, plumbing, HVAC, or safety concerns—are addressed promptly, keeping your business up and running without unnecessary delays.
- » Our team is trained to resolve issues quickly and effectively, with the expertise to handle even the most complex commercial facility challenges.

Comprehensive Facilities Management

- » United offers a full suite of facilities management services designed to meet the specific needs of commercial properties. From routine janitorial services and waste management to landscaping, building security, and compliance with health and safety standards, we take care of every detail.
- » Our focus is on creating safe, clean, and welcoming environments where employees, tenants, and visitors can thrive. We manage everything from cleaning common areas to ensuring that your building meets all local codes and regulations.

Energy Management and Sustainability

- » Energy efficiency is a priority for many businesses looking to reduce operational costs and lower environmental impact. United offers energy management services that help you optimize energy usage, implement energy-saving upgrades, and reduce waste.
- » We conduct energy audits, identify areas for improvement, and implement solutions that help cut energy costs while promoting sustainability.

Asset Management and Reporting

- » Our asset management services ensure that the critical systems and infrastructure in your commercial buildings are well-maintained and properly managed. We track the performance of assets, monitor condition, and create long-term maintenance plans to maximize efficiency and reduce operational risks.
- » Our regular reports provide you with valuable insights into asset health, upcoming maintenance needs, and strategic recommendations for your facility’s long-term upkeep.

Work Order Types

All Work Order Types

Recurring

Service Request

Make Ready

Subtask

Renovation

☒

Work Order Priorities

All

Work Order Statuses

All

Work Order Origins

All

Period

Current Week

Week starts on:

Monday

Generate By

Created Date

Location Type

Property

Problem Categories

All Problem Categories

Non Categories

Appliances

Cabinetry

Doors and Windows

Electrical

Flooring

Assigned Employee

All Assigned Employee

No User Assigned

Daniel Dane

Kevin Barie

Ronnie Gonzalez

Alex O'Rourke

Gary Lopez

Problems

All Problems

1000 Mailroom

2000 Mailroom

2nd floor parking garage

4th Floor County Parking

Locations

All Locations

1st Floor Common Area

2nd Floor Common Area

3rd Floor Common Area

APM Office

Our Approach: Proactive, Responsive, and Hospitality-Focused

United emphasizes a comprehensive, proactive approach to facilities management that prioritizes both operational efficiency, hospitality, and customer service:

Infusing Hospitality and Customer Experience into Facilities Management

- » United integrates hospitality and customer service into every aspect of our facilities management. We believe that every interaction—whether with employees, tenants, or guests—should reflect our commitment to professionalism, courtesy, and attention to detail.
- » From our technicians to our customer service team, we prioritize respectful communication and a positive attitude in every service call, ensuring that all individuals interacting with your facility feel valued and well cared for.

Preventive Maintenance Focus

- » We recognize that commercial properties require consistent, proactive maintenance to avoid costly repairs and ensure smooth day-to-day operations. Our preventive maintenance programs are specifically designed to keep critical systems in top condition, addressing potential issues before they impact your business.
- » With tailored maintenance schedules, we ensure all areas of your commercial facility—from HVAC to plumbing to electrical systems—are regularly inspected and serviced.

Rapid Response to Emergencies

- » United is committed to delivering rapid response times to address any emergency or urgent repair needs. We understand that your commercial property needs to remain operational at all times, and our team is available 24/7 to respond quickly and effectively to any service request.
- » Whether it's an HVAC system failure, plumbing leak, or electrical issue, we are on-call to ensure your business experiences minimal downtime.



Tailored Services for Commercial Needs

- » We understand that commercial properties come with specific needs, and we tailor our services accordingly. Whether you operate a corporate office building, a retail space, or a mixed-use commercial complex, we work with you to ensure that all aspects of your facilities management align with your business goals.
- » We ensure that all systems, from security to maintenance to cleaning, work seamlessly to create a productive, safe, and comfortable environment for everyone on the premises.

Work Order Process:

I. Request Submission:

Branch staff submit maintenance requests through our dedicated system or support platform, detailing the issue and any relevant information (e.g., location, type of problem, urgency).

II. Request Review & Prioritization:

Once submitted, the request is reviewed by our maintenance management team. We assess the priority based on urgency, impact, and available resources. Emergency or high-priority issues are expedited, while less urgent matters are scheduled accordingly.

III. Assignment to Technicians:

The request is assigned to an appropriate technician or maintenance team based on the nature of the issue and their expertise. If required, specialized contractors are engaged for specific tasks.

IV. Execution of Maintenance:

The technician or team arrives on-site to assess the problem and perform the necessary maintenance or repairs. They provide updates to the branch staff on the progress and completion timeline.

V. Completion & Documentation:

Once the maintenance is complete, the technician ensures the issue is fully resolved. The maintenance request is then marked as complete in the system, with relevant details documented for tracking and future reference.

VI. Follow-up & Feedback:

To ensure satisfaction, the Regional Manager will reach out consistently for feedback on the service, and any follow-up actions are promptly taken.

IX. REPORTING

Reporting Overview

UPPM is committed to providing owners and key stakeholders with detailed and insightful performance reports. We adhere to the principle that all operational activities and interactions must be meticulously documented within our system, ensuring data accuracy and reliability. This rigorous approach to record-keeping enables us to generate thorough, data-driven reports that offer a complete overview of your property's financial and operational health. These insights collectively illuminate successes and identify opportunities for strategic enhancements, empowering you to optimize your asset's performance.

Client Calls

» Cadence:

- Lease-up/distressed: bi-weekly
- Stabilized: monthly
- *This cadence will be adhered to unless otherwise requested*

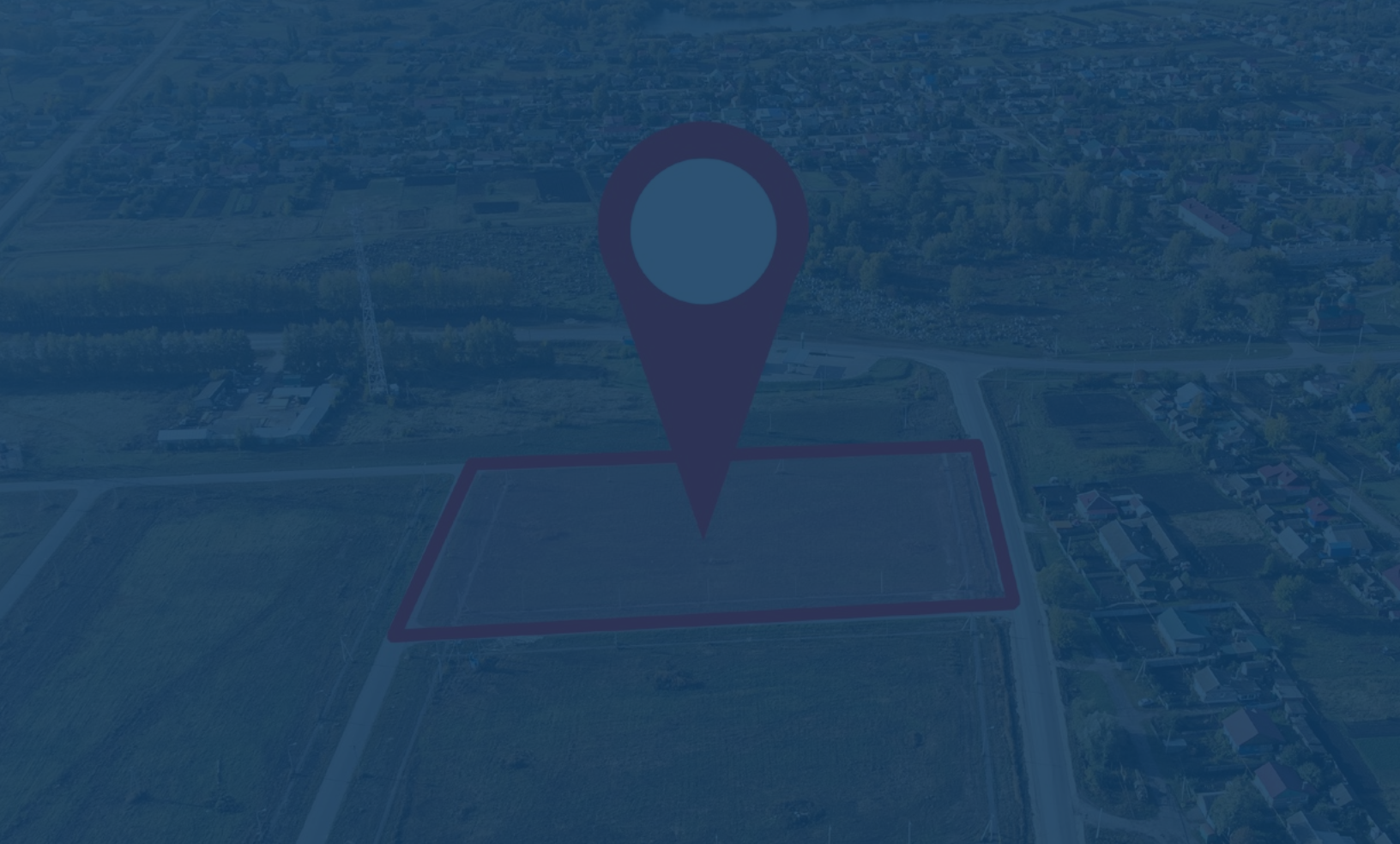
» Topics:

- Occupancy status: move-ins, move-outs, renewals
- Financial review: budget, actual, NOI, loss to lease
- KPIs: traffic, tours, traffic to tour, leases, tour to close, close ratio
- Lead management: applications, hot & warm leads
- Marketing strategy: current and future
- Lifestyle and programming



Reports

- » **Financials:** Cashflows and distributions
- » **Business Intelligence:** Historical data trends over time (monthly, quarterly, and yearly)
- » **Stacking Plan:** Unit availability by location within property
- » **Renewal Performance:** Expiring leases vs. out of sequence
- » **Resident Data:** Demographic, financial, and behavioral data
- » **Market Analysis:** Rental recommendations based on competitor survey
- » **Marketing:** Outreach grid and 90-day marketing plan
- » **Lifestyle:** Monthly calendar of events



X. ADDITIONAL SERVICES



Additional Services Overview

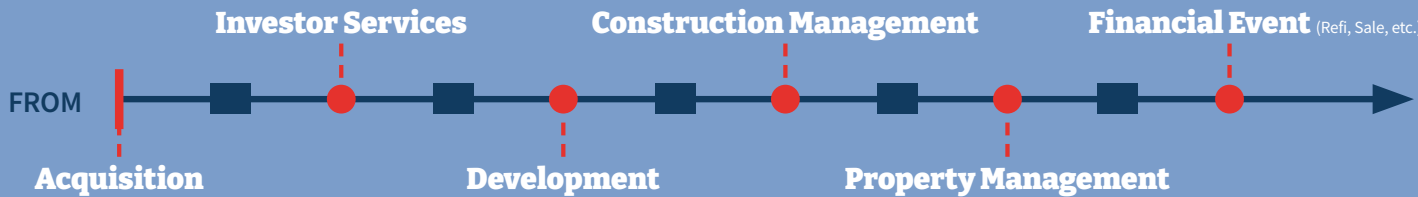
Vertically Integrated

United Group is a full-service, vertically-integrated leader in real estate development and management, boasting over 50 years of industry expertise. Our fully-staffed departments in each discipline mean we can support your project every step of the way. We’re here to get your project off the ground, from conducting market studies and feasibility reports for land purchases to raising debt and equity. Once the property has closed, our Development and Construction Management teams ensure the ideal property is designed and built. Finally, our award-winning management, marketing, and sales services will take your project from zero to stabilized in record time. No matter if you engage United Group for one service or all, you can expect custom-tailored, elite results.

Partner with us for the **full-service, vertically-integrated** experience...

| Development & Construction Mgmt | Finance & Accounting | Property Management | Human Resources | Marketing |
|---|--|---|--|--|
| Project Drawing + Plan Review Advise on designs, materials, building systems, equipment, and constructability | Bookkeeping Manage all financial aspects including transactions, depreciation, and portfolio valuation | Operations Resident activities, facility maintenance, leasing, marketing, and event planning | Recruitment + Talent Acquisition Placement of the industry's top talent to meet the needs of the business | Project Naming Market research and due diligence inform the process in creating the perfect property name |
| Code Review Expert knowledge for conducting thorough code reviews for ensuring quality and compliance | Cash Flow Analysis Financial health analysis by examining the inflow and outflow of cash for strategic financial planning | Vendor Relations Contract management and master agreements for utilities, marketing sources, contractors, and more | Payroll Administration Managed weekly payroll services, related reporting, and market analysis | Branding The branding process crafts a visual identity, including logo, style guide, collateral, & signage |
| Municipal Approvals Understanding local code and permitting and attending zoning/planning board meetings | Monthly Reporting Summarizing all financial transactions and performance for a clear and concise overview | Award-Winning Lifestyle Programs Each portfolio type has its own unique program overseen by our VP of Lifestyle | Health + Financial Wellness Strategic employee-focused informational programming to support physical, mental, and financial wellness | Marketing Plan Crafting the marketing plan involves strategic analysis, target audience identification, goal setting, tactics, and evaluation |
| Reporting + Punch Lists Performed proactively and consistently to ensure contract and quality enforcement | Due Diligence Audits services for asset transactions including lease, property, financial audits and more | Data Analysis Optimize performance via rent analysis, current housing market analysis, tax analysis, Claritus reports and more | Benefits Comprehensive and expansive employee benefits; health & supplemental insurances, telemedicine services, 401K retirement, and PTO | Lead Generation Maximize traffic by seamlessly integrating digital and traditional marketing channels for comprehensive outreach |
| FF&E Design + Procurement Management of Interior Designer partnerships and advisement based on market research | Analysis Loan Covenant Analysis, Sales Analysis, Sources & Uses, BOV, and Assumptions | Asset Management Fiduciary responsibility by maximizing NOI and operate through an ownership lens | Professional Development Certifications, licensing / credentialing, and continuing education requirements | Reporting ROI, Lead & Lease Attribution, Geo Traffic Reports, Demographics by Unit Type, and more |
| Schedule Creation + Management Coordinating efforts between general contractor and third parties to ensure on-time delivery of the project | Investor Services Manage investor communications and updates via Update Capital portal, Manage K1s, etc | Advanced Reporting Business Intelligence tools, daily & weekly activity reports, plus custom reporting based on client needs | Training Job-and-industry-specific, compliance, and KSA enhancement to improve performance | Dedicated Field Marketing Manager Responsible for driving traffic and consults on 90-day marketing plans, assists in outreach and event planning |
| On-Site Management Consistent and active presence on all construction sites including daily reporting and corresponding photography | Key Partnerships Leverage UGOC relationships with auditors and insurance brokers | Best Practices Proprietary database of best practices, standard operating procedures, and resident handbooks for all properties | Employee Engagement + Recognition Culture-focused programming dedicated to workplace satisfaction, diversity, equity and inclusion, and sustainability | Creative Services In-house team specializing in content creation, design, copywriting, digital advertising, social media, marketing technologies, and more |
| Partner Selection Assist in selecting and coordinating services of architect(s), surveyors, geotechnical engineers, special consultants, and more | Proforma Creation / Advising Partner with Development, Construction, and Management teams for creating a comprehensive financial model | Organization Chart Each discipline overseen by an executive: Lifestyle, Sales, Marketing, Asset Management, Regional VP | Performance Management Ongoing and purposeful feedback to plan, monitor, develop and reward employee performance | Public Relations In-house team helps builds brand reputation, manages communications, and cultivates positive relationships with stakeholders |
| Bid Management Develop and collect bidder interest, as well as bid review, analysis, and selection | Risk Management Safety committees, policies & procedures, incident reporting, & claim handling | IT / Business Systems Services Management of all telecom, networks, devices, and technologies | Off-Boarding Procedural actions to uphold Company security, information, and resources | Data & Analysis Optimize marketing spend and effectiveness across platforms using advanced analytics |

...and we'll help with every step along the process.



A blue-tinted photograph of a business meeting. In the center, a man and a woman are shaking hands over a table. They are both smiling. Other people are seated around the table, also smiling. Laptops and papers are on the table.

XI. NEXT STEPS

Next Steps

Please reach out to Jonathan Kaplan for a detailed Management Agreement proposal:



Jonathan Kaplan

VP, Asset Management

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