



United Plus Property Management® (UPPM), AMO®  
by **unitedgroup**

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# AWARD-WINNING PROPERTY MANAGEMENT

SENIOR | MULTIFAMILY | STUDENT | COMMERCIAL

**united**  
**group**

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A group of people, including a man in a vest and several women, are gathered around a roulette table in a casino. The table is green with a grid of numbers and betting options. The scene is dimly lit, and the overall tone is blue. A large white text overlay reads "I. OVERVIEW" with a red underline.

# I. OVERVIEW

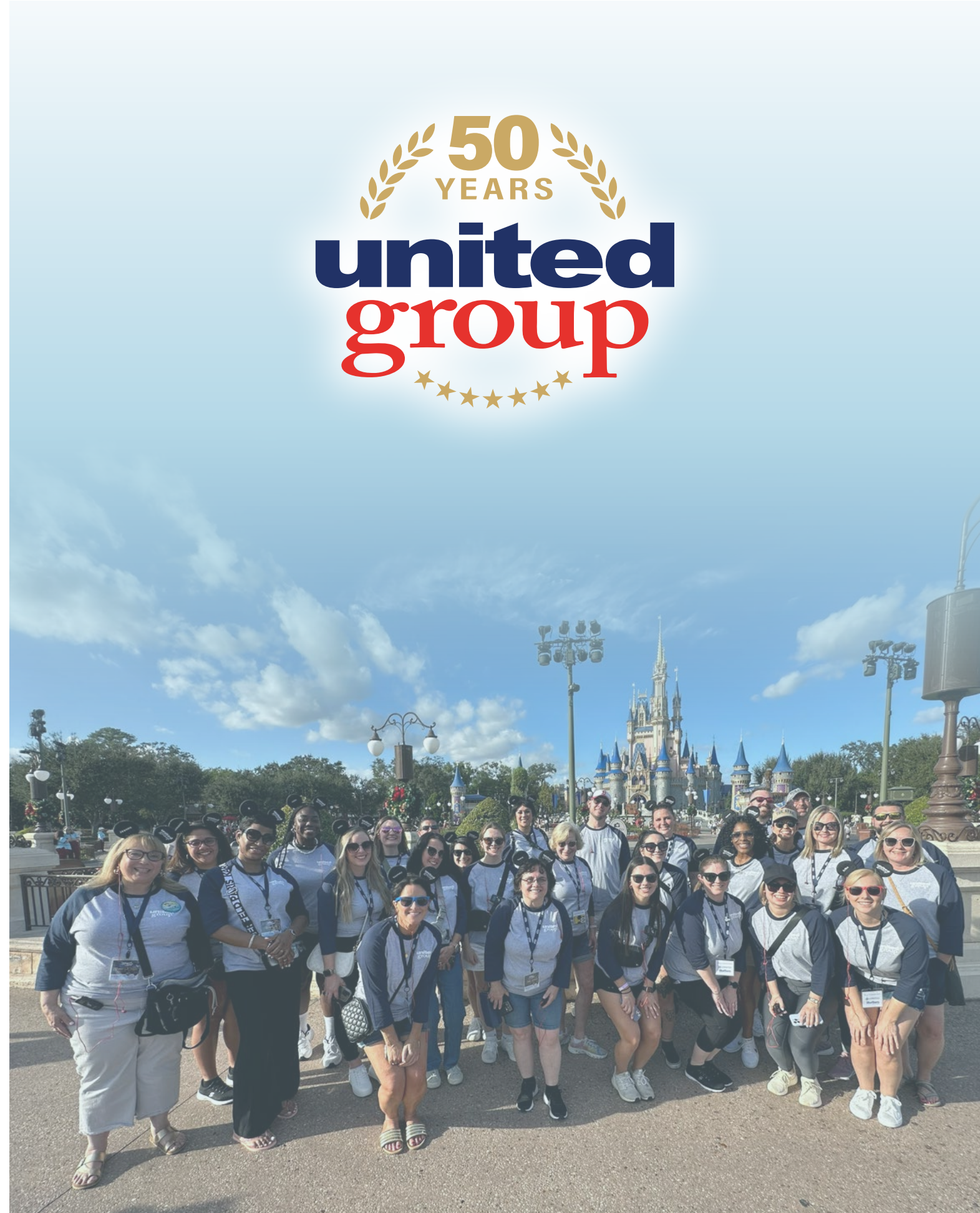
# Who We Are

## Mission Statement

United Group is a full-service, vertically integrated leader in real estate development and property management with over 50 years of industry expertise. The company, founded in 1972, is multi-generational and family-owned, and headquartered in Troy, NY. 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** that specializes in bringing properties from lease-up to stabilization, and creating exception value opportunities
- » **Award winning:** Over 50 awards including three-time winner of the Accredited Management Organization (AMO®) of the Year by the Institute of Real Estate Management (IREM) in 2012, 2019, and 2024.
- » **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, immediate access to executive expertise, customized reporting, and lifestyle programming



# UPPM 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  
35 years experience



**Michael DiGiacomo**  
Chief Operating Officer  
20 years experience



**Joan Cavanaugh**  
Chief Human Resources Officer  
41 years experience



**Tracey Poissant**  
Chief Financial Officer  
25 years experience



**Jonathan Kaplan**  
VP, Property Management  
19 years experience



**Erin VanDeusen**  
VP, Operational Strategy  
14 years experience



**Corey Deame**  
Director of Marketing Services  
18 years experience



**Ashley Wysocarski**  
Director of Field Marketing  
16 years experience



**Marybeth Riscica**  
Sr. Regional Manager (NY)  
17 years experience



**Julie Bohl**  
Regional Manager (FL)  
24 years experience

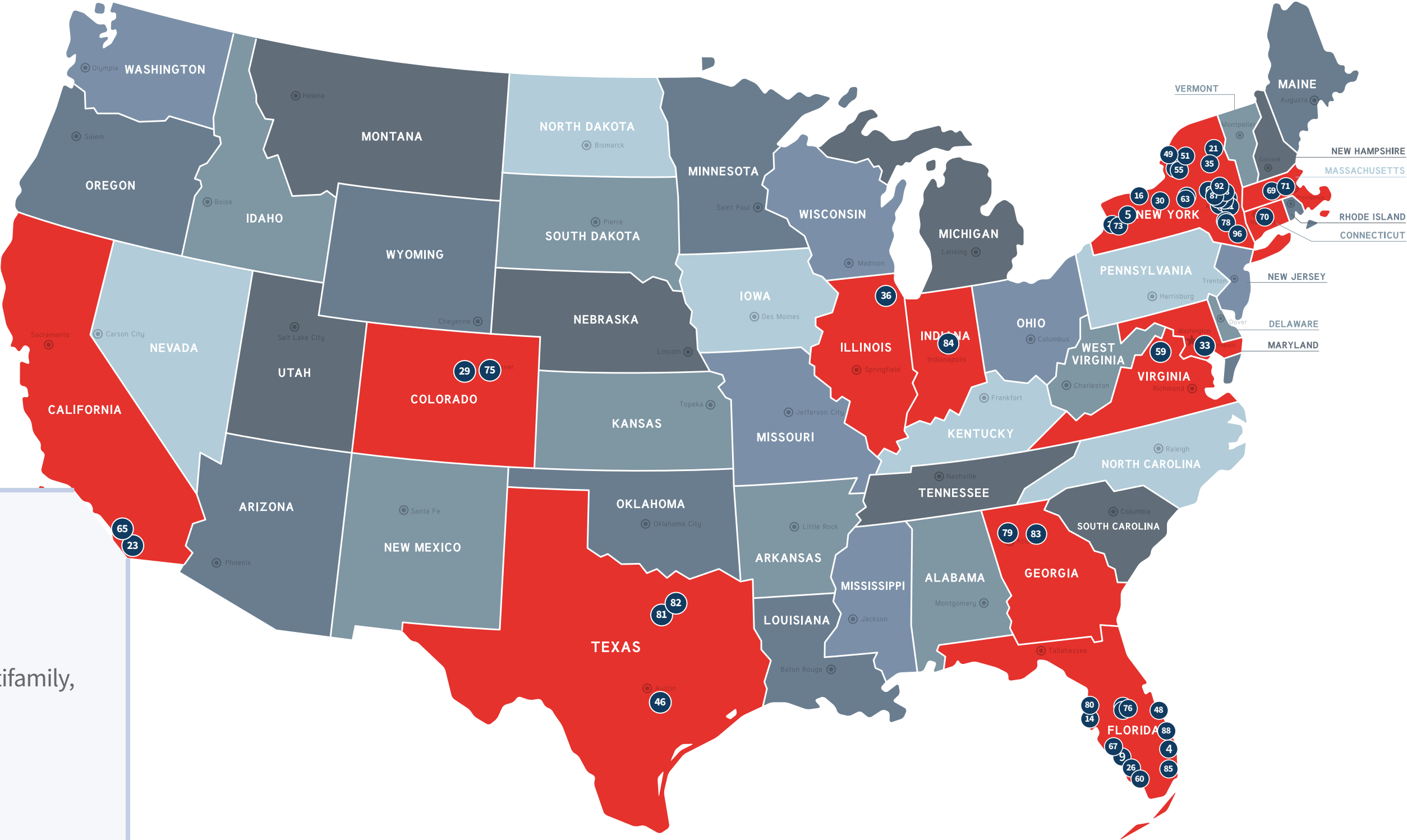


**Stacey Spinner**  
Regional Manager (NY)  
25 years experience



**Cait Murray**  
Operations Manager  
4 years experience

# Properties Managed – Historical *(50+ years of experience)*



**Summary**

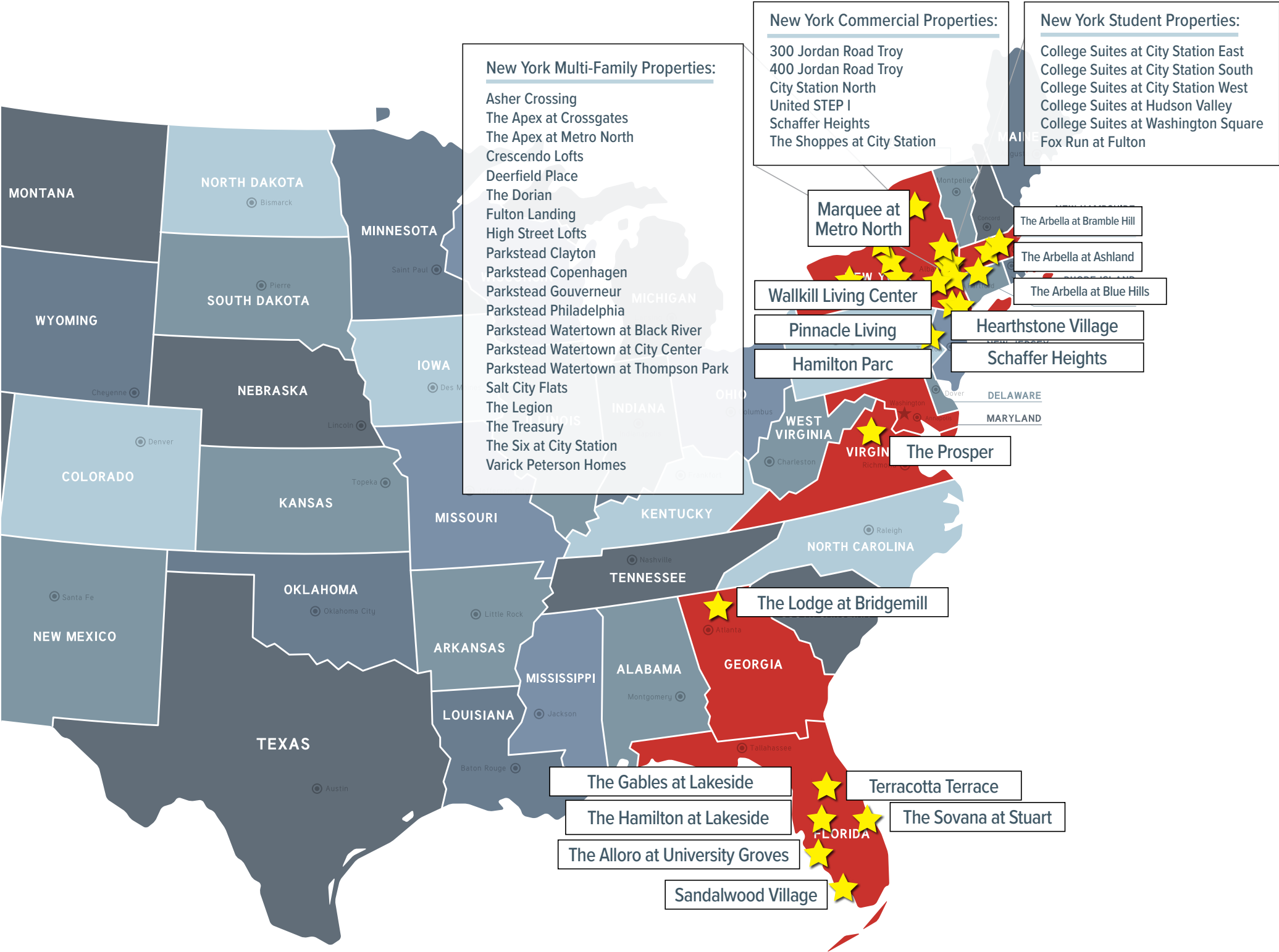
- » 28,000+ units
- » 12 states
- » Senior, student, multifamily, office & retail
- » 100+ properties
- » 60+ markets / MSAs

# 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		Williamsville	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

# Current Properties Managed



Type	Property	Location	Size
Multi-Family	Asher Crossing	Williamsville, NY	90 units
	The Apex at Metro North	Cicero, NY	220 units <i>[In Development]</i>
	The Apex at Crossgates	Guilderland, NY	222 units <i>[In Construction]</i>
	Crescendo Lofts	Buffalo, NY	42 units
	Deerfield Place	Utica, NY	156 units
	The Dorian	Williamsville, NY	7 units
	Fulton Landing	Poughkeepsie, NY	69 units
	The Gables at Lakeside	Kissimmee, FL	208 units
	The Hamilton at Lakeside	Kissimmee, FL	108 units
	High Street Lofts	Poughkeepsie, NY	67 units <i>[In Development]</i>
	The Legion	Poughkeepsie, NY	7 units
	Loudon House	Loudonville, NY	25 units
	Parkstead Clayton	Clayton, NY	100 units
	Parkstead Copenhagen	Copenhagen, NY	75 units
	Parkstead Gouverneur	Gouverneur, NY	75 units
	Parkstead Philadelphia	Philadelphia, NY	150 units
	Parkstead Watertown at Black River	Watertown, NY	224 units
	Parkstead Watertown at City Center	Watertown, NY	256 units
Parkstead Watertown at Thompson Park	Watertown, NY	120 units	
The Six at City Station	Troy, NY	87 units <i>[In Construction]</i>	
Varick Peterson Homes	Newburgh, NY	122 units	
<b>TOTAL</b>			<b>2,430 UNITS</b>
Senior	Arcadia Gardens	Palm Beach Gardens, FL	220 units
	The Alloro at University Groves	Sarasota, FL	183 units
	The Arbella at Ashland	Ashland, MA	180 units <i>[In Development]</i>
	The Arbella at Bramble Hill	Worcester, MA	123 units <i>[In Development]</i>
	The Arbella at Blue Hills	Bloomfield, CT	164 units <i>[In Development]</i>
	Marquee at Metro North	Cicero, NY	180 units <i>[In Development]</i>
	Hearthstone Village	Latham, NY	144 units
	The Lodge at BridgeMill	Canton, GA	150 units
	Pinnacle Living at Forts Ferry	Latham, NY	63 units
	The Prosper at Winchester	Winchester, VA	160 units <i>[In Development]</i>
	Sandalwood Village	Naples, FL	163 units
	Schaffer Heights	Schenectady, NY	118 units
	The Sovana at Stuart	Stuart, FL	182 units
	Terracotta Terrace	Casselberry, FL	152 units <i>[In Development]</i>
Wallkill Living Center	Middletown, NY	136 units	
<b>TOTAL</b>			<b>2,594 UNITS</b>
Student	College Suites at City Station East	Troy, NY	157 beds / 48 apartments
	College Suites at City Station South	Troy, NY	55 apartments
	College Suites at City Station West	Troy, NY	184 beds / 48 apartments
	College Suites at Hudson Valley	Troy, NY	268 beds / 72 apartments
	College Suites at Washington Square	Schenectady, NY	264 beds / 69 apartments
	Fox Run at Fulton	Poughkeepsie, NY	469 beds / 146 apartments
	<b>TOTAL</b>		
Commercial	300 Jordan Road	Troy, NY	36,000 SF
	400 Jordan Road	Troy, NY	97,000 SF
	City Station North	Troy, NY	40,000 SF
	United STEP I	Malta, NY	108,285 SF
	Schaffer Heights	Schenectady, NY	48,000 SF
	The Shoppes at City Station	Troy, NY	30,900 SF
<b>TOTAL</b>			<b>360,185 SF</b>

# 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 and ensuring our reputation as a proven leader remains unmatched.



# Award-Winning Management Company



## AMO® of the Year (Accredited Management Organization®)



## II. OPERATIONS

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# 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 marketing and asset management services 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 striving for the pinnacle of 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 business plan.



# Asset Management & Financial Reporting

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, operating expenditure analysis, and optimizing portfolio performance to ensure sustained income growth. By analyzing current market conditions and future supply & demand trends, the team identifies emerging opportunities 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 and investors. 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

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# Lifestyle Overview

While many apartment communities offer great amenities, UPPM-managed communities stand out because of our focus on the resident experience. We believe a person’s lifestyle—their habits, tastes, and living standards—is what makes a community feel like home.

Our dedicated lifestyle team creates a variety of events that educate, inspire, and celebrate our residents. The core of this programming is a spirit of hospitality. We ask our team members to imagine what they would do to make a beloved relative’s visit special, and then we apply that thought process to every event we create.

Our approach is flexible, adapting to the changing needs of our residents, whether they are seniors, students, or families. This commitment to resident lifestyle is now a major topic for owners, investors, and developers, as it directly correlates with resident retention.

According to a study by Kingsley Associates, a leader in multifamily data analysis, a one-point increase in resident satisfaction can result in an 18% lower likelihood of residents leaving and an 8% increase in their intent to renew. The same increase in satisfaction also decreases vacancy by 7%.

Our focus on lifestyle at United Group creates a sense of belonging for our residents. By providing executive-level oversight and specific training, we empower our teams to be creative and resourceful, which keeps us at the forefront of the industry.

## Programs



LIVE.



LEARN.



RELAX.

(Student)

## Mobile App

The new “SUN Program App” will serve as a digital hub for each senior lifestyle-focused community (with a student app to follow shortly thereafter). It will reinforce our commitment to resident experience by offering a seamless and personalized way for residents to engage with our curated events and programs. The app will empower residents to RSVP to events, connect with neighbors, and provide feedback, all from their smartphones. This technology will not only streamline our hospitality efforts and improve operational efficiency but will also gather valuable data on resident interests, allowing our team to continually refine and enhance our programming to meet ever-changing expectations, directly impacting resident satisfaction and retention rates.



# 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



## 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



Actual Residents



Actual Residents



Actual Residents

# Resident Retention

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

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## 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**
- **Proactive contact cadence**
- **Key performance indicators**
- **Mystery Shop Program (Comp. Analysis)**
- **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 “Lite”, Active Adult, Multifamily, Student, or Commercial — the stage of the community's lifecycle (new construction/lease-up, stabilized, or even distressed 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%	4-6	8.75%
Student Summer Turn	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent
Student Stabilized	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent	Market Dependent
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 extended DOM (Days on Market)
- » **Macro economic conditions** and the impact of interest rates and credit
- » **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

# Mystery Shop Program

Every asset is shopped quarterly via internet inquiries, phone inquiries, and in person. Each Field Sales & Marketing Manager monitors their portfolio and coaches the staff on the action items upon completion of the Mystery Shop. Roll-up reporting is done bi-weekly, monthly, and quarterly (depending on the state of the asset).

- » **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<sup>✓</sup> by  Grace Hill<sup>®</sup>

## 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
<b>Diamond</b> <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	
<b>Level Total (x15 residents)</b>		<b>\$23,850</b>
<b>Platinum</b> <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
<b>Level Total (x15 residents)</b>		<b>\$15,750</b>
<b>Gold</b> <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
<b>Level Total (x15 residents)</b>		<b>\$10,950</b>
<b>Tier Total</b>		<b>\$50,550</b>



# V. MARKETING

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# 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 Return on Investment (ROI) analysis**
- **In-house agency services**
- **Branding package**
- **Socially F.I.T.™ 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 behavioral 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:

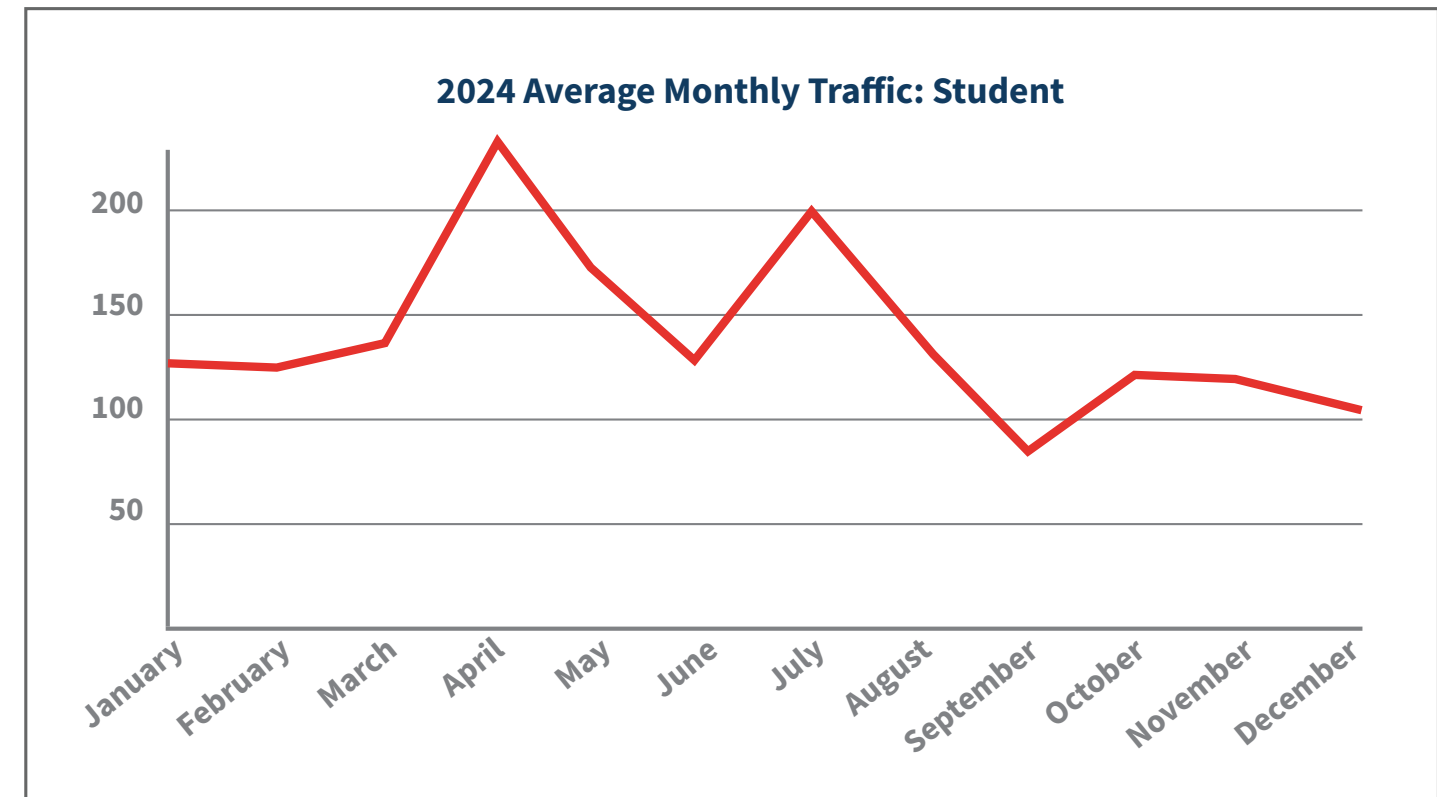
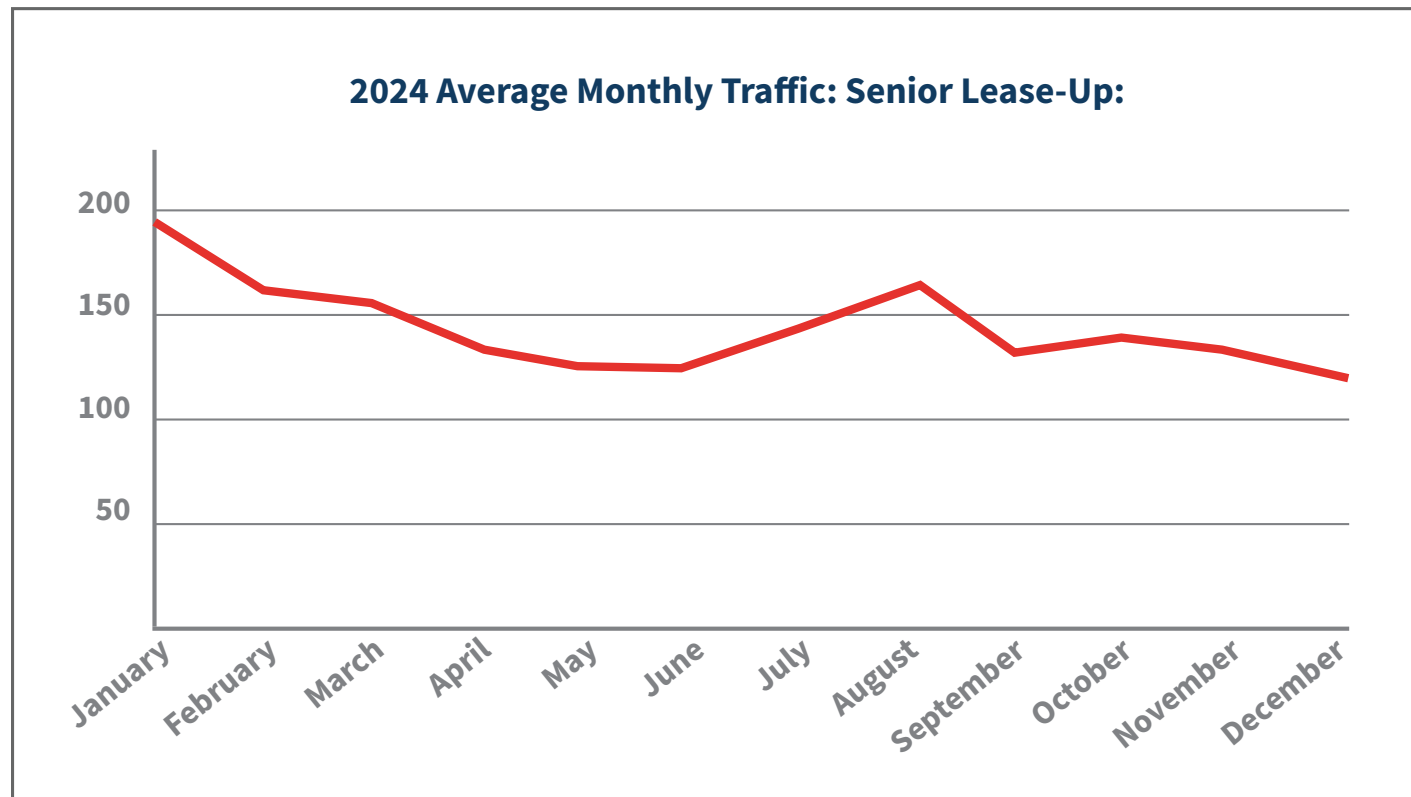
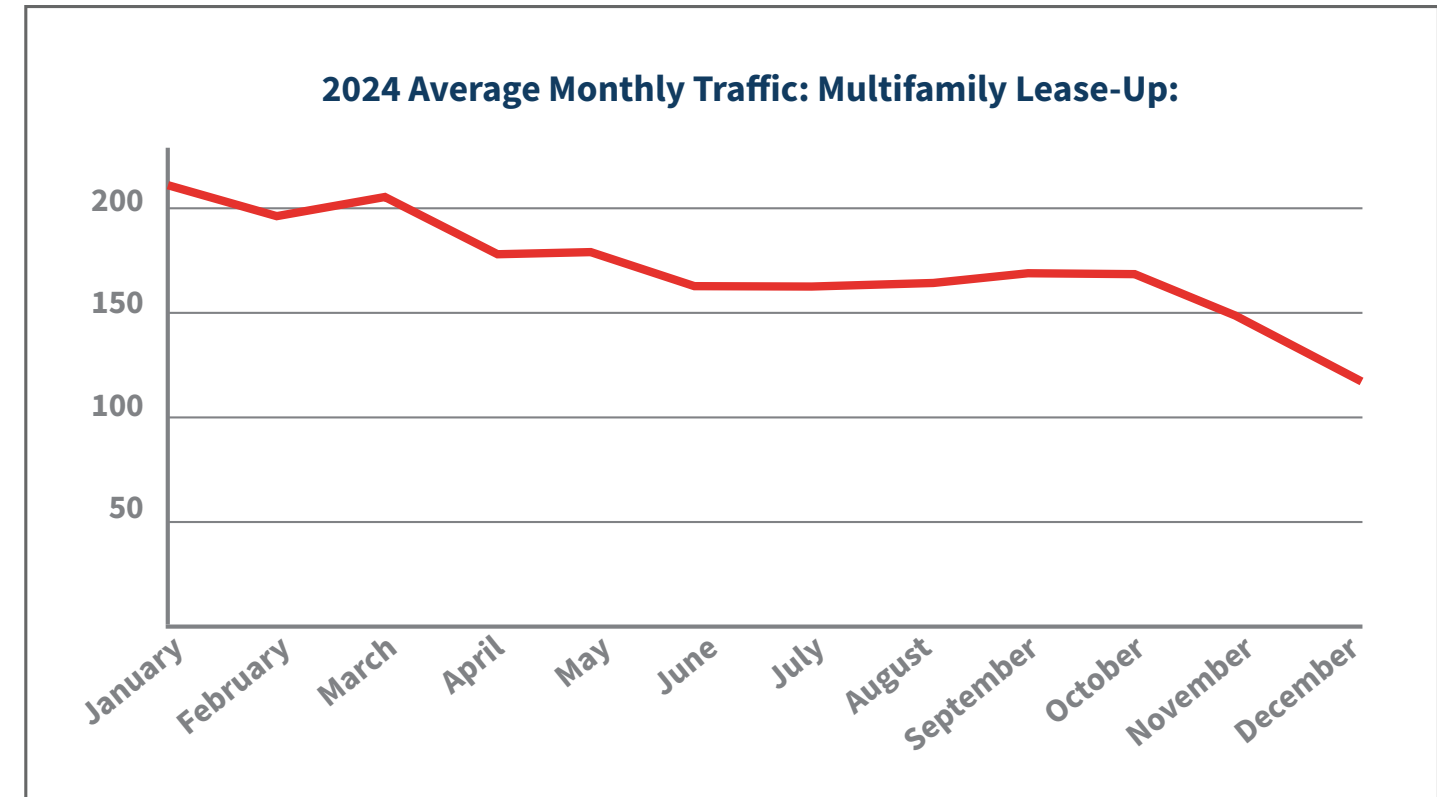
- » Executive Summary
- » Market Study
- » Target Demographics & Audience Personas
- » Positioning: Differentiation & Value Proposition
- » Budget (pre-opening costs)
- » Marketing Channels
- » Messaging & Brand Identity
- » Social Media: Socially FIT™ Implementation
- » Public Relations & Reputation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

# 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	-	-	\$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	-	\$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	-	\$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	-	\$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	\$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	-	\$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	\$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	-	\$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	-	\$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	-	\$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	-	\$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	\$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	\$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	-	\$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	-	\$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	\$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	-	-	\$0	0	0	0	-	-
Outreach	\$200	1	1	0	\$200	-	\$0	0	0	0	-	-	\$0	6	0	0	-	-	\$200	7	1	0	\$29	-	\$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	\$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	\$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	-	-	\$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	\$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	-	\$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	\$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	-	-	\$355	6	0	0	-	-
Seniorly	\$0	5	0	0	-	-	\$0	0	0	0	-	-	\$0	1	0	0	\$0	-	\$0	6	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	-	\$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	-	\$0	3	0	0	\$0	-
Van Signage	\$0	0	0	0	-	-	\$0	0	0	0	-	-	\$0	1	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	-	\$3,414	23	3	0	\$148	-
<b>TOTALS</b>	<b>\$17,741</b>	<b>192</b>	<b>49</b>	<b>8</b>	<b>\$92</b>	<b>\$2,218</b>	<b>\$21,723</b>	<b>204</b>	<b>44</b>	<b>9</b>	<b>\$106</b>	<b>\$2,414</b>	<b>\$16,556</b>	<b>176</b>	<b>42</b>	<b>7</b>	<b>\$94</b>	<b>\$2,365</b>	<b>\$56,020</b>	<b>572</b>	<b>135</b>	<b>24</b>	<b>\$98</b>	<b>\$2,334</b>						

## 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 (\$))

Sample property and data – ROI analysis by source, prior 3 months in 2025

# Branding

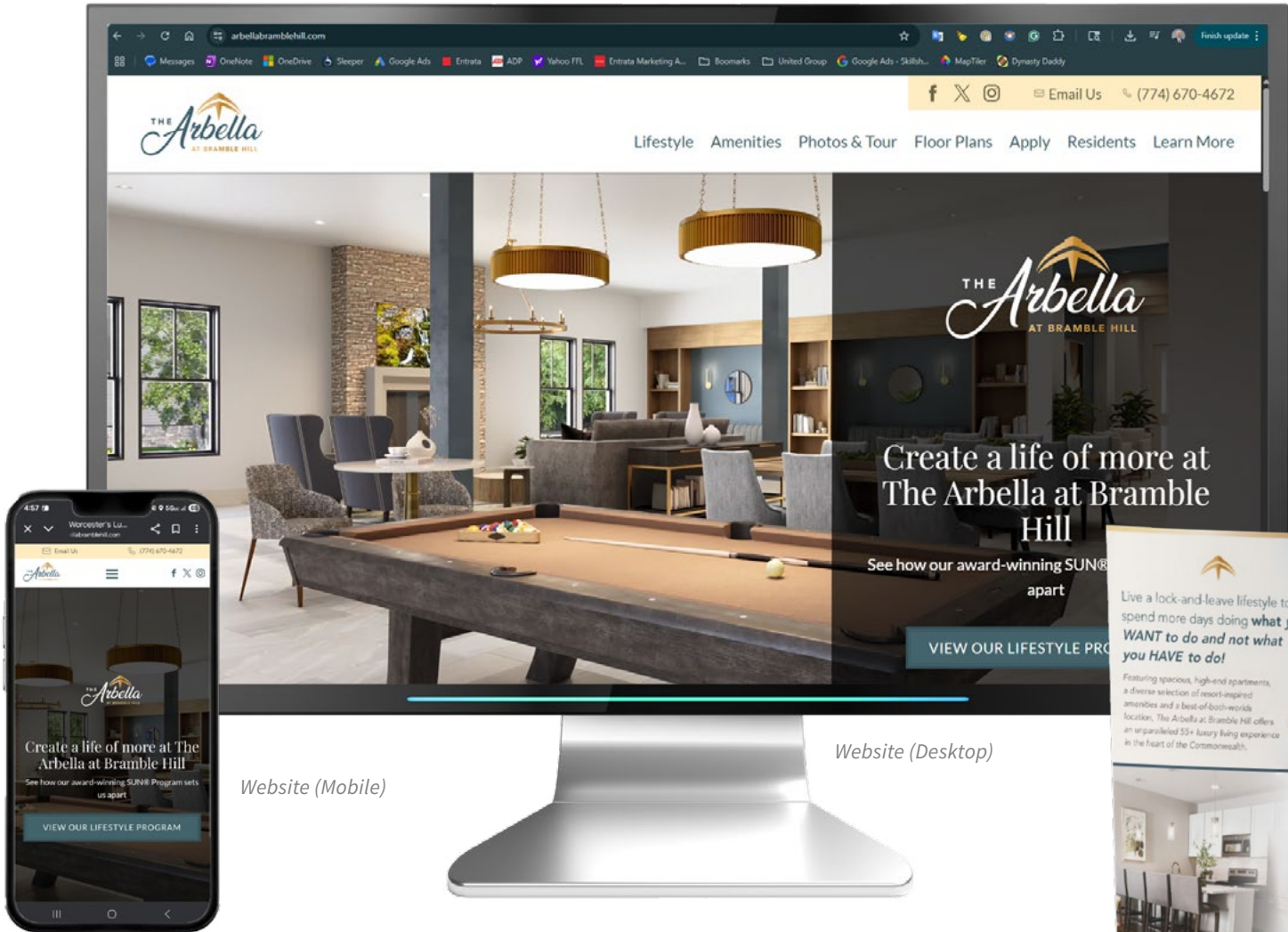
Our branding services offer a comprehensive process designed to elevate your property’s identity and market presence. We begin with an in-depth **market study** to understand the unique landscape, identify optimal positioning, and pinpoint key differentiators. This foundational research informs every 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**.

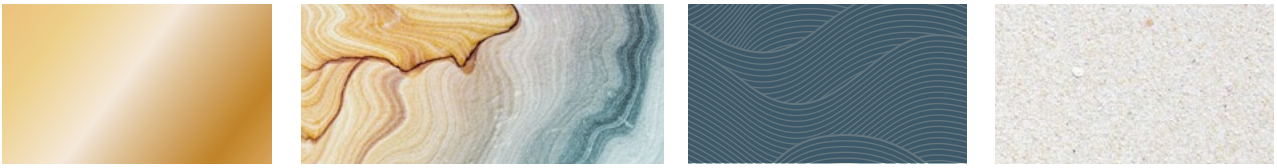


Color Palette

DARK TEAL	BROWN	DARK GOLD	GOLD	SAND	LIGHT TEAL
HEX: #404266 RGB: 64, 66, 110, 1 CMYK: 42, 11, 0, 37	HEX: #776663 RGB: 119, 107, 99 CMYK: 0, 10, 17, 53	HEX: #d9962c RGB: 218, 156, 44 CMYK: 0, 28, 80, 15	HEX: #f3982c RGB: 243, 201, 130 CMYK: 0, 17, 4, 5	HEX: #d9d9d9 RGB: 224, 220, 211 CMYK: 0, 2, 6, 12	HEX: #62b2b6 RGB: 98, 176, 182 CMYK: 46, 3, 0, 29



Brand Textures



# 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

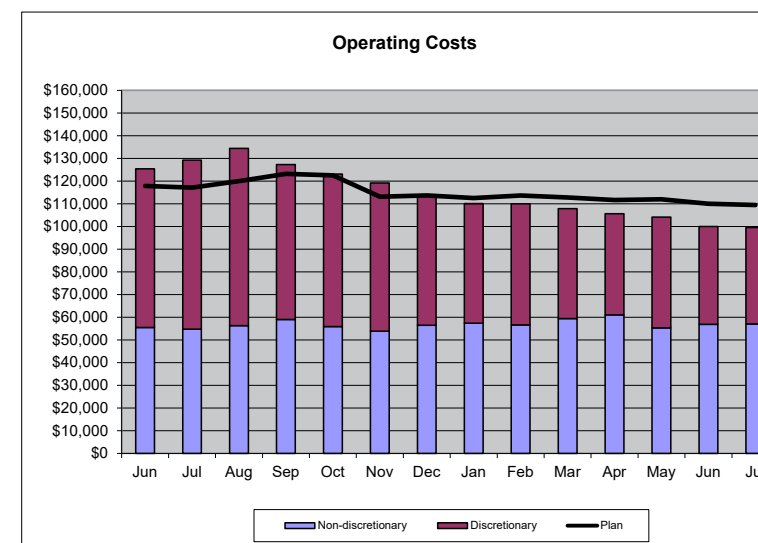
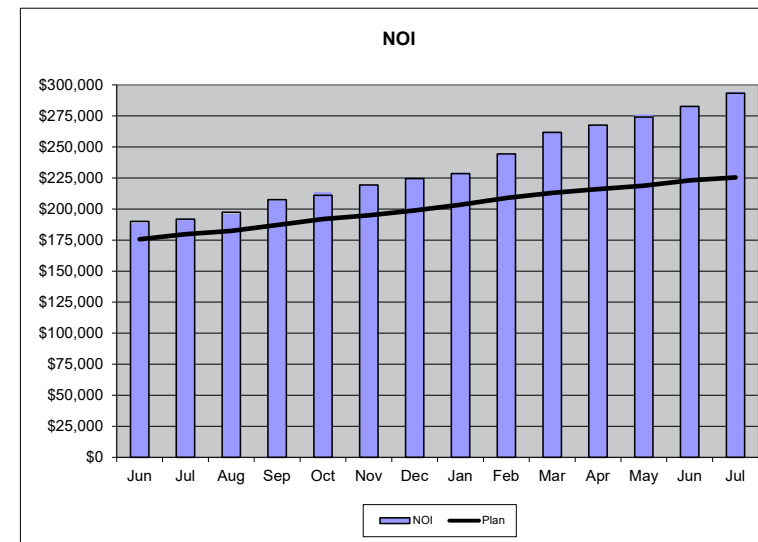
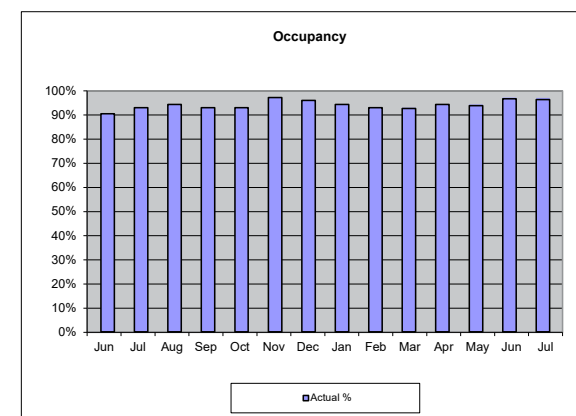
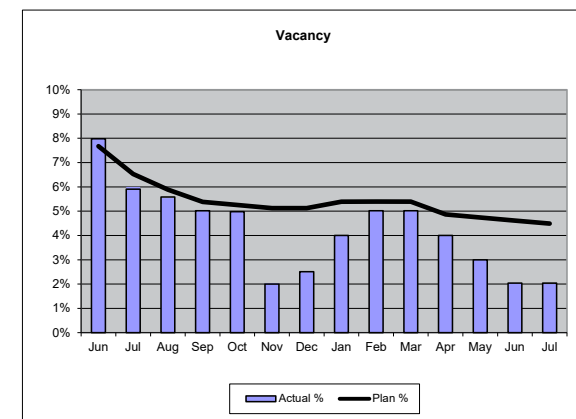
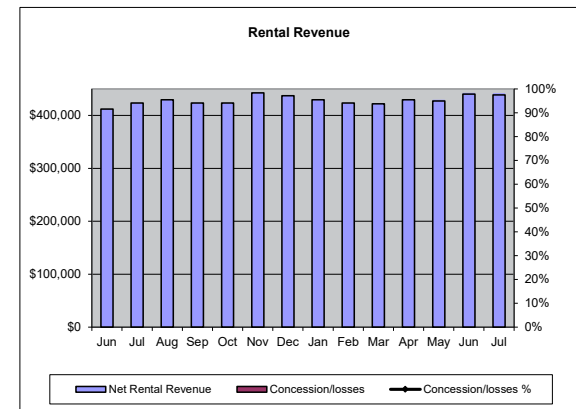
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# Accounting Overview

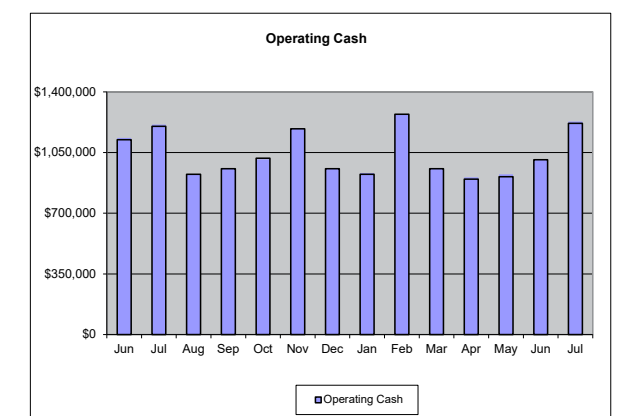
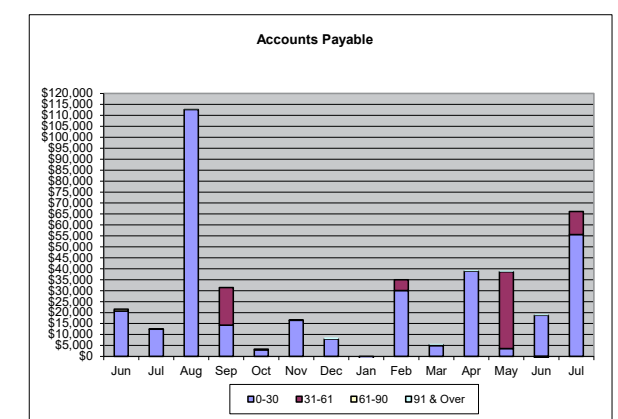
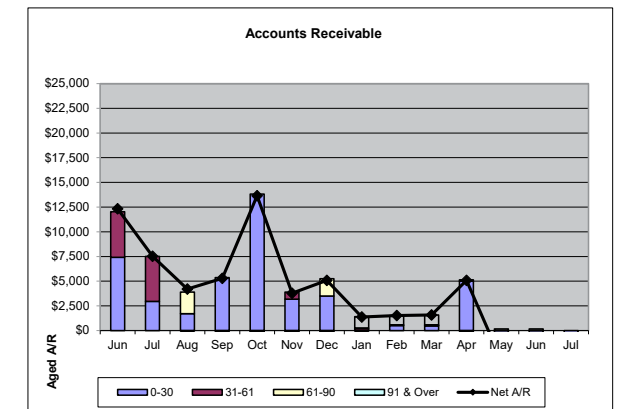
UPPM offers comprehensive accounting services designed to provide complete financial oversight and strategic guidance for your real estate investments. Beyond meticulous bookkeeping, which encompasses the management of all financial transactions, accurate depreciation calculations, and precise portfolio 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, 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 anticipated investor return metrics.

## Sample Financial Charts



\* Non-discretionary costs are Taxes, insurance, utilities, and management fee





# VII. HUMAN RESOURCES

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# Human Resources Overview

Our Human Resources team is the backbone of our organization, ensuring every aspect of our operations aligns with the ever-evolving landscape of labor laws, regulations, and internal policies. From developing clear and comprehensive employee policies and handbooks, delivering essential training programs, managing compensation and benefits, and addressing employee relations with care and precision, the Company’s Human Resources team proactively identifies risks and implements solutions that support our business and employees alike. Our steadfast commitment is about cultivating a fair, safe, and high-performing workplace where employees can thrive and the organization can confidently achieve its strategic goals and desired profits. **We take pride in hiring the best and brightest—because excellence begins with our people.**

## The functions they serve include:

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

## Guiding Principles

- » **Community:** we recognize that community is essential to overall wellness, that’s why we’re dedicated to fostering a strong, inclusive environment where employees, customers, partners, and stakeholders can thrive together.
- » **Impact:** At United Group, every role contributes meaningfully to our mission, ensuring that when we give our best, we feel the value and purpose in return.
- » **Balance:** Our mission to create better lives extends beyond residents and investors — it includes our employees. We prioritize and support a healthy work-life balance so our team can succeed both professionally and personally.
- » **Longevity:** Since 1972, we’ve been building lasting relationships and transforming lives. The long-standing commitment of our investors, employees, and partners is a true reflection of the trust, stability, and enduring values that define United Group.

## Awards

United Group is proud to be a Top Workplace locally and nationally! Recognized as an Albany Times Union Top Workplace for nine consecutive years, and a Top Workplaces USA for five consecutive years”.



# Training & Professional Development - United University

**United University** is our comprehensive training and development program, designed to equip employees with the knowledge, skills, and growth opportunities needed to succeed and thrive within our organization. Combining online courses, instructor-led training, and hands-on field experience, the program delivers a well-rounded learning journey. Its purpose is to provide exceptional training and practical tools that inspire, support, and promote both individual growth and organizational effectiveness. Through thoughtfully designed curricula tailored to meet diverse needs and goals, United University empowers employees to reach their full potential. Our commitment to continuous learning not only strengthens our workplace culture and customer service excellence, it also builds a clear path for internal advancement and long-term success.



## 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

We thrive on a people-first culture that celebrates teamwork, professionalism, continuous learning, and giving back. Our workplace is dynamic and engaging, where hard work is recognized, achievements are celebrated, and every team member is empowered to make a meaningful impact. We foster a sense of community that extends beyond the workplace, encouraging both personal growth and social responsibility.

## 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
- » Earth Day Garden Box Building
- » Ronal McDonald House
- » Things of My Very Own
- » 518 Day
- » Habitat for Humanity



### 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.

- » Company-wide Wellness Challenges - Walking Challenge, Biggest Loser, Maintain Don't Gain, Water/Hydration Challenge
- » Annual Health & Wellness Fair
- » Annual Flu Shot Clinics
- » Mental Health Support Services – UCM Mental Health (SAM by UCM)
- » Company-paid Calm App Subscription
- » Wellness Wednesday Communications



### 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
- » Employee Appreciation Day
- » Maintenance Appreciation Week
- » National Property Manager's Day
- » UPPM Achievement Awards + Recognition



### 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 Program
- » Annual Manager's Retreat
- » IREM Training Curricula + Certifications
- » Industry Conferences



### Be Fun

At United Group, our camaraderie stands out. We believe that enjoying the workplace together not only boosts morale but also inspires creativity and innovation.

- » National Fun at Work Day
- » Ice Cream Socials
- » Wedding & Baby Shower Celebrations
- » Summer BBQs
- » March Madness & Sports Competitions
- » Group outing



# VIII. FACILITIES MANAGEMENT

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# 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.

The screenshot displays a report generation interface with the following sections:

- Work Order Types:** Search bar, All Work Order Types, Recurring, Service Request (checked), Make Ready, Subtask, Renovation.
- Period:** Current Week, Week starts on: Monday, Generate By: Created Date, Location Type: Property.
- Problem Categories:** Search bar, All Problem Categories, Non Categories, Appliances, Cabinetry, Doors and Windows, Electrical, Flooring.
- Assigned Employee:** Search bar, All Assigned Employee, No User Assigned, Daniel Dane, Kevin Barie, Ronnie Gonzalez, Alex O'Rourke, Gary Lopez.
- Work Order Priorities:** All.
- Work Order Statuses:** All.
- Work Order Origins:** All.
- Problems:** Search bar, All Problems, 1000 Mailroom, 2000 Mailroom, 2nd floor parking garage, 4th Floor County Parking.
- Locations:** Search bar, 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

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# 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*

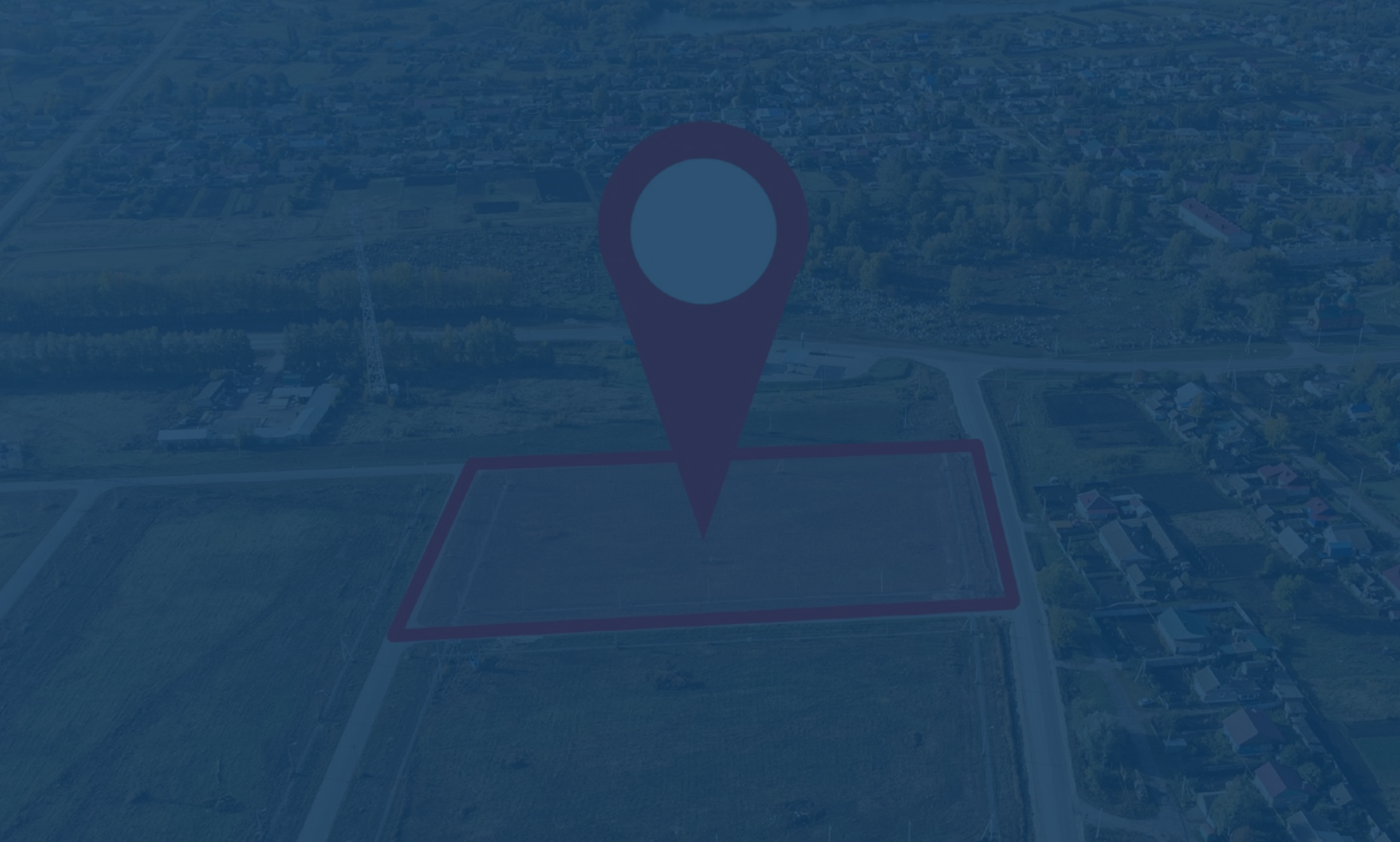
### » Topics:

- 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 return level analysis
- » **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

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# Additional Services Overview

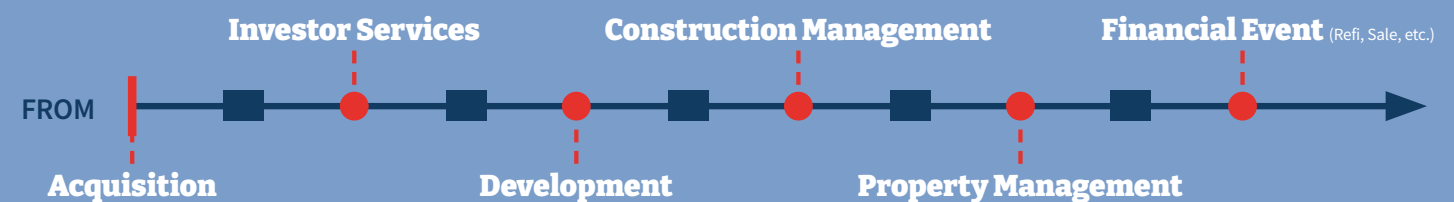
## Vertically Integrated

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

# XI. NEXT STEPS

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## Next Steps

**Please reach out to Michael DiGiacomo for a detailed Management Agreement proposal:**



### **Michael DiGiacomo**

Chief Operating Officer

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C: (518) 265-6960