



# UNITED APARTMENT GROUP

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## COMPANY OVERVIEW

As a leader in 100% fee-managed property management, we are committed to maximizing the value and performance of your real estate assets. Our expertise covers a wide spectrum, including new construction properties, lease-ups, extensive renovations, Housing and Urban Development (HUD) Low Income Housing Tax Credit (LIHTC), Public Finance Corporation, and Historic Tax Credit (HTC).

At United Apartment Group (UAG), our strength lies in our robust internal teams. From accounting to marketing, training, and regional maintenance, we work together synergistically to ensure optimal results and tenant satisfaction. Whether you have affordable communities, senior living facilities, or conventional communities, our tailored services are designed to meet your unique needs.

We go beyond traditional property management; we are growth partners. We specialize in assisting lending institutions with the marketing, reconstruction, and sale of REO properties, providing crucial support during transitions. Moreover, our full due diligence services, including detailed property evaluations and new business analysis, empowering you to make informed decisions that align with your strategic goals.

Partner with United Apartment Group today and experience a partnership that drives value, fosters community, and delivers exceptional results. Let us help you expand your portfolio and reach new heights in your real estate investment.

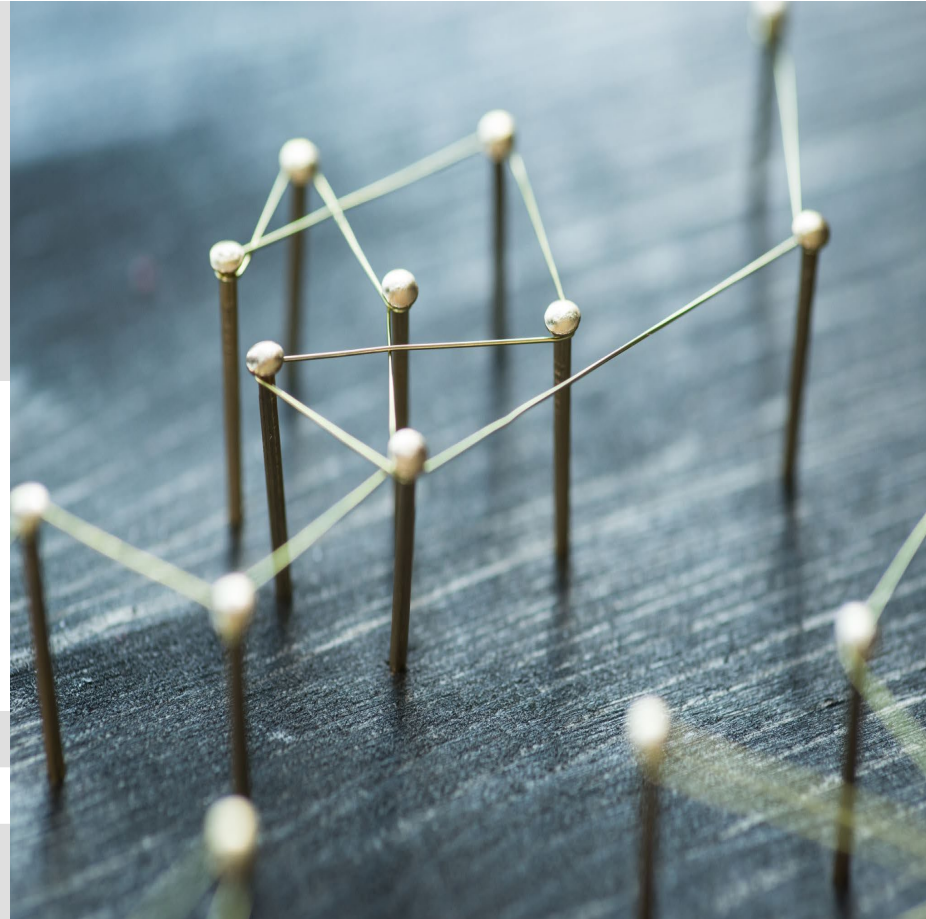


# OUR COMPANY



Since our inception in 1995, United Apartment Group (UAG) has experienced remarkable growth, expanding our managed units by more than twenty-five-fold. Today, our portfolio's value stands at 3 billion AUM, a testament to our unwavering dedication to excellence.

We take pride in the fact that over 98,000 residents have chosen to make their homes in our communities, reflecting the trust and satisfaction they have in our services. This significant growth and the consistent renewal of management contracts are not merely coincidental but are the result of our adept executive leadership and the positive relationships our team maintains with residents.



At UAG, we understand the importance of safeguarding your investments. We treat your assets with the same level of diligence and care as we would our own, ensuring that industry standards are not just met but exceeded. Our commitment to excellence has not only earned us industry accolades but has also led to consistent property value appreciation, reliable cash flows, and efficient capital management.

We believe that by establishing a strong foundation of excellence, we not only demonstrate our commitment but also set a standard of quality and security for our investors

# OUR COMMITMENT

## EXPERTISE



At the core of our expertise is the ability to tailor our services to meet the diverse needs of various market segments. Whether it's conventional residential properties, affordable living communities, or senior communities, we excel in customization.

Our comprehensive suite of management services ensures that every aspect of property management is handled with meticulous attention to detail. From day-to-day operations to long-term strategic planning, we exercise due diligence at every step to protect our clients' valuable investment properties and secure their financial futures.

What sets us apart is our unwavering dedication to excellence. We don't just meet industry standards; we consistently surpass them. Our reputation for delivering exceptional results has been built on a foundation of professionalism, integrity, and relentless pursuit of excellence.

At United Apartment Group, we operate on the principle of uncompromising service. We go above and beyond to meet and exceed our clients' expectations, ensuring that every interaction with our team reflects the highest standards of quality and professionalism.



## DEDICATION

# OUR REPUTATION

Our reputation is a testament to our commitment to excellence. We don't settle for the ordinary; we strive for the exceptional. At United Apartment Group, we take a comprehensive approach to delivering unparalleled service.

Our team goes above and beyond to secure your financial future by implementing strategies that exceed industry standards.

- Generating higher rental income through strategic pricing and marketing.
- Fostering market competition to maximize property value.
- Enhancing resident availability and demographic insights for targeted marketing.
- Achieving lower vacancy rates through proactive management.
- Providing full on-site property management for seamless operations.
- Offering ongoing education and advanced staff training to stay ahead of industry trends.
- Overseeing property remodeling and thorough renovations with a commitment to excellence.
- Maintaining a pristine physical environment to attract and retain residents.
- Supplying expert on-site marketing to showcase the property's unique features.
- Ensuring superior resident services to boost retention rates.
- Producing weekly reports on occupancy, leasing, collections, expenditures, and performance.
- Focusing on long-term financial planning to safeguard your investment.



# OUR VALUES

Our culture is defined by core values that shape everything we do: passion, attention, courage, humility, and impact. These values guide our interactions and services, driving us to exceed client expectations at every opportunity.

We are dedicated to continuous improvement and take a unified approach to achieve our goals. Our motto, "**Live United. Work United,**" encapsulates our commitment to fostering a cohesive and positive work environment.

## Passion

Finding meaning in our daily endeavors.

## Attention

Safeguarding our esteemed reputation.

## Courage

Embracing change fearlessly.

## Humility

Prioritizing other's needs.

## Impact

Making a difference in every interaction.

By living and working UNITED, we ensure that every member of our team is empowered to contribute their best, resulting in unparalleled service and exceptional outcomes for our clients.



# OUR COMMUNITIES



## CONVENTIONAL

Our dedication to enhancing resident satisfaction and fostering employee retention allows UAG to maximize the property's yields in the form of higher rents and lower vacancy rates.



## AFFORDABLE

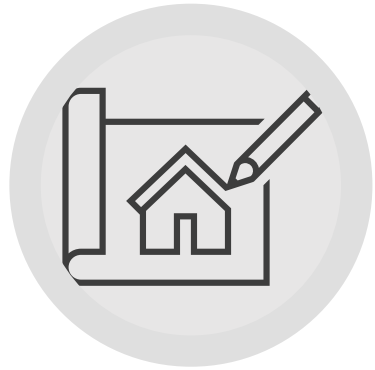
In Affordable Living communities characterized as Tax Credit, Tax Exempt Bond, AHDP, HOME, HUD and Section 8, we offer a heightened awareness of compliance requirements and regulatory mandates.



## PUBLIC FACILITY CORPORATIONS

UAG not only facilitates access to affordable housing but also plays a crucial role in revitalizing targeted areas, by providing mixed-income housing contributing to the overall development and enhancement of communities.

# OUR COMMUNITIES



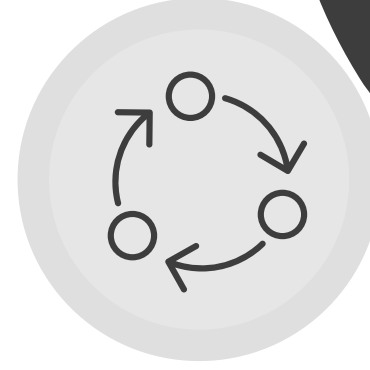
## NEW CONSTRUCTION

UAG excels in new construction and lease-up projects, ensuring each property is set up for success from groundbreaking through to stabilization.



## BUILD TO RENT

UAG specializes in the leasing and management of build-to-rent single-family homes, a rapidly growing sector in the real estate market.



## REO RECEIVERSHIP

UAG possesses comprehensive expertise in aiding lending institutions with the management, marketing, reconstruction, and sale of REO properties.



# REGIONAL MAINTENANCE COORDINATOR

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Our Regional Maintenance Coordinator (RMC) Inspection programs prioritize the life and safety aspects of our assets.

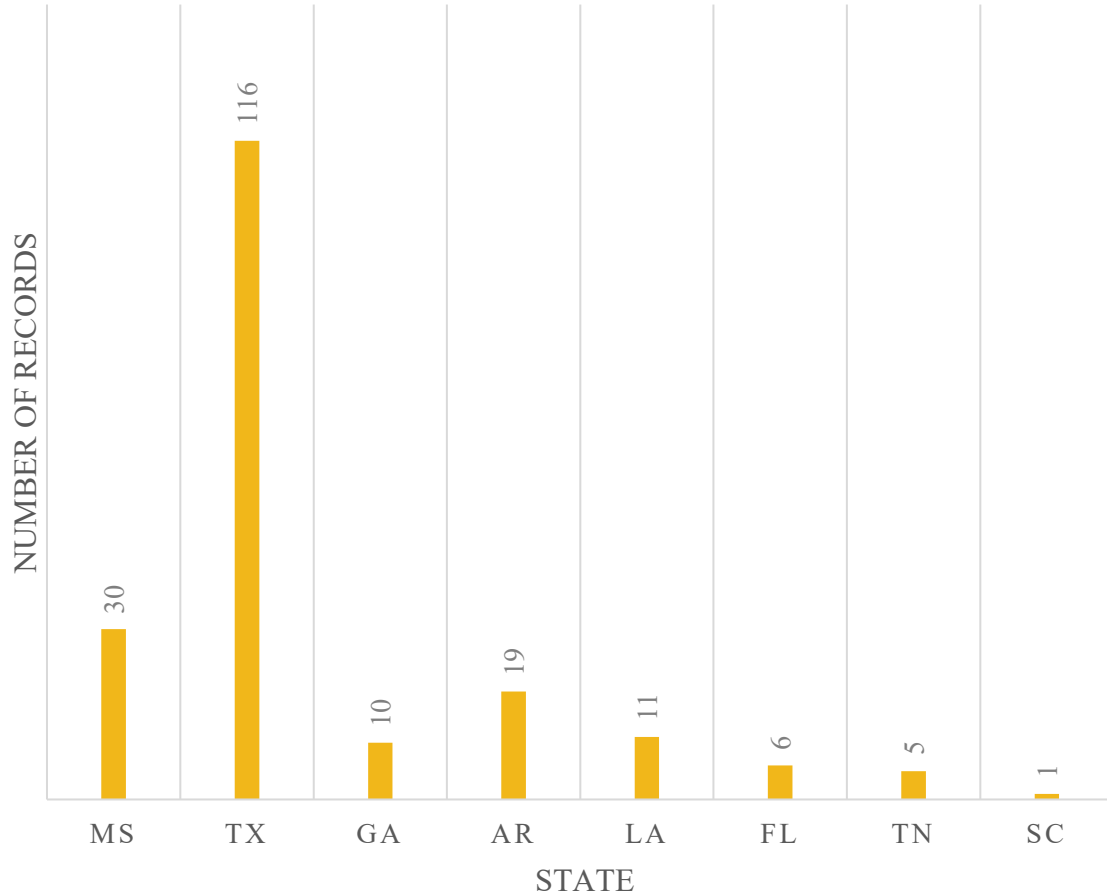
RMCs assist with state inspections, including the new National Standards for the Physical Inspection of Real Estate (NSPIRE). Working closely with the onsite team, they ensure that the physical condition of your properties consistently meets all regulations required under the housing programs.

These thorough inspections are conducted on a quarterly basis, dedicated to guaranteeing that the overall maintenance of our communities not only meets but often exceeds the high standards set by our company and our valued clients. The focus on life and safety issues underscores our commitment to providing secure and well-maintained living environments for our residents, resulting in our proscores.

We are committed to maintaining the highest standards of compliance and property upkeep for your investments.

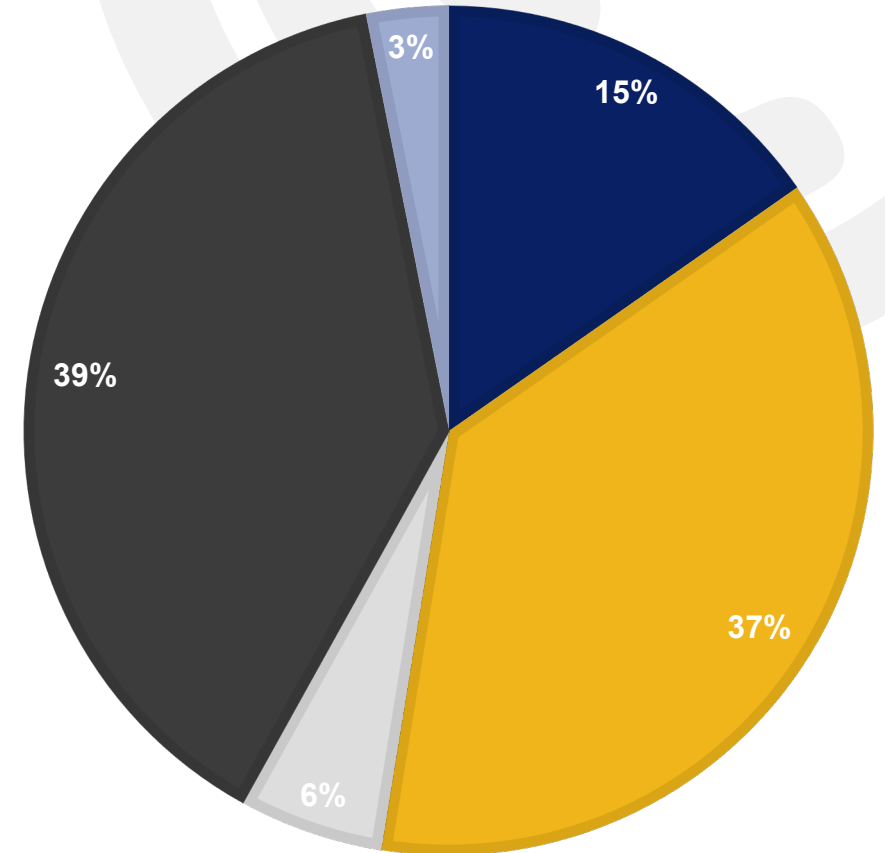


## PROPERTY DISTRIBUTION BY STATE



## PROPERTY TYPE

■ Affordable ■ Conventional ■ Senior ■ Tax Credit ■ Tax Exempt (PFC)



# OUR SERVICES

At United Apartment Group, we pride ourselves on our robust internal teams. Our accounting, marketing, training, and regional maintenance departments work synergistically to ensure optimal results and resident satisfaction. Our comprehensive approach allows us to deliver exceptional service and maintain high standards across all our properties.



In addition to our internal teams, we offer full due diligence services. This includes detailed property evaluations and new business analysis, ensuring you make informed decisions that align with your strategic goals. Our meticulous approach guarantees that every aspect of property management and investment is thoroughly assessed and optimized.

# AREAS OF EXPERTISE



# DECADES OF EXCELLENCE

At United Apartment Group (UAG), our commitment to excellence spans decades, earning us numerous accolades and establishing us as a leader in the multifamily housing industry.

We have consistently been recognized for our outstanding performance and dedication:



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# CARRIE GIRGUS

## PRESIDENT AND MANAGING PARTNER

Carrie Girgus, CPM®, serves as the President and Managing Partner of UAG Ventures AC, L.P. d.b.a. United Apartment Group, headquartered in San Antonio, Texas. Renowned as a global leader and seasoned expert in multi-family property management, Carrie leads the premier fee management firm. She oversees an extensive portfolio comprising over 29,000 multi-family units, including Senior Living, Build-To-Rent, Affordable, Conventional, Lease Up, and Value Add communities across eight states, catering to a diverse clientele.

Under her strategic direction and influence, Carrie's team has expanded significantly, now encompassing over 700+ management professionals. Her tactical and detailed planning, legendary problem-solving methods, mentoring and coaching skills, and leadership expertise ensure operational performance for all clients and partners.

With a distinguished career spanning 35 years, Carrie worked with prominent firms before founding her own company, where she managed operations for over 12,000 units. Under her stewardship, UAG has witnessed remarkable growth, expanding its managed units by more than twenty-five-fold, with the portfolio's value approaching \$3 billion AUM. This exceptional growth in unit occupancy and management contract renewals is a testament to her visionary leadership. Carrie's unwavering commitment to setting high quality and security standards for investors, clients, and partners underscores her dedication to excellence.



# TIM SETTLES

## COO AND MANAGING PARTNER

Tim Settles, CPM, serves as the Chief Operating Officer and Managing Partner of UAG Ventures AC, L.P. d.b.a. United Apartment Group, based in San Antonio, Texas. With over 35 years of expertise in the multi-family property management industry, Tim is recognized as a prominent leader and the founder of United Apartment Group, which he established in 1995.

As the driving force behind United Apartment Group, Tim has been instrumental in evolving the company into San Antonio's premier fee management firm, now operating across eight states.

Tim's exceptional leadership has facilitated the growth of the team to over 600 management professionals and the management of over 29,000 units. His practical approach and dedication to cultivating lasting relationships with clients and employees have significantly contributed to the company's growth and resilience.

Throughout his notable career, Tim has spearheaded remarkable growth for UAG, increasing managed units by more than twenty-five-fold and elevating the portfolio's value to nearly \$3 billion AUM. This substantial growth in occupancy rates and contract renewals underscores his outstanding leadership. Tim's steadfast commitment to upholding high standards of quality and security for investors, clients, and partners exemplifies his dedication to excellence.



# PROGRAMS

United Apartment Group (UAG) leverages a suite of advanced web-based programs and products designed to drive operational excellence and enhance the prospect and resident experience. By integrating market-leading technology, UAG aims to optimize every facet of property management, from initial prospect engagement to ongoing resident satisfaction, ensuring maximum yield and efficiency. These innovative solutions empower UAG to streamline operations, provide superior customer service, and maintain a competitive edge in the multifamily housing industry.





## ANSWER AUTOMATION



Answer Automation is a cloud-based multifamily answering service designed to streamline communication and improve service efficiency. This innovative system automatically answers and routes calls, ensuring quicker service and timely escalations when necessary. On-call staff are promptly notified, and maintenance requests are sent directly to the appropriate personnel. Additionally, users can easily access detailed reports from the cloud, providing valuable insights and enhancing overall operational management.

Business Intelligence is the premier multifamily business intelligence solution that increases revenue and minimizes risk by providing 360-degree portfolio insight and actionable intelligence. With customizable dashboards and a best-in-class report writer, users can access the critical data they need, when they want it, and in the format they prefer. This superior BI tool offers drill-down transparency of key performance indicators (KPIs) at virtually any level of aggregation, from asset type and region to floor plan and unit level, ensuring comprehensive and precise analysis for optimal decision-making.



## BUSINESS INTELLIGENCE

## REALCONNECT



RealConnect, formerly known as EasyLMS, is a cutting-edge learning solution designed to deliver just-in-time learning, providing the teams with the information they need precisely when they need it. RealConnect allows employees to access quick videos and instructional content on-the-go, enabling them to perform tasks efficiently while learning. By creating tailored learning pathways based on position, market type, and location, we guide our employees' learning journey effectively. Microlearning modules ensure employees return to their tasks quickly, enhancing productivity and effectiveness.

Maintenance Management is designed to keep maintenance personnel actively engaged on the property and provide residents with faster, more efficient service. Work orders and make-readies can be assigned quickly, site teams can monitor open jobs, measure performance to identify areas for improvement, and shorten response times. Maintenance Management ensures a seamless and responsive maintenance experience that delights residents and enhances operational efficiency.



## MAINTENANCE MANAGEMENT: FACILITIES

## FINANCIAL SUITES



RealPage® Accounting, a comprehensive web-based property management accounting solution suitable for corporate operations of any size. Fully integrated with OneSite Leasing & Rents, RealPage Accounting offers streamlined, automated workflows. This solution provides full visibility into site-level data from a single platform, centralizing processing across all sites for enhanced efficiency.

CRM solution integrates marketing, leasing, and analytics tools into one user-friendly and easy-to-train platform. Knock's Centralized Leasing Suite allows leasing agents to seamlessly navigate between properties, regardless of their location. Enhance your leasing efforts and support front office teams By automating redundant tasks and providing prospects with the information they need, we are able to enhance our leasing efforts.



## LEAD MANAGEMENT SYSTEMS

## ONESITE



OneSite Leasing & Rents is a comprehensive, end-to-end property management solution known for its customizable modules, supporting various aspects of property management including accounting, budgeting, facilities management, and document management. This web-based solution streamlines and automates daily operations for our diverse housing types: conventional, affordable, tax credit, and senior living.

Active Building resident portal provides residents with self-service, mobile access to all aspects of apartment life. This platform boosts online payment adoption, drives more renewals, and monetizes community amenities, events, and rentable items, all while enhancing staff efficiency and increasing portfolio yield.



## RESIDENT PORTAL

## OPS TECHNOLOGY



With RealPage® Spend Management software solutions, the entire purchase order (P.O.) and approval process is automated, providing real-time visibility into spending against our budget. This automation makes invoice processing significantly easier, more accurate, and timelier.

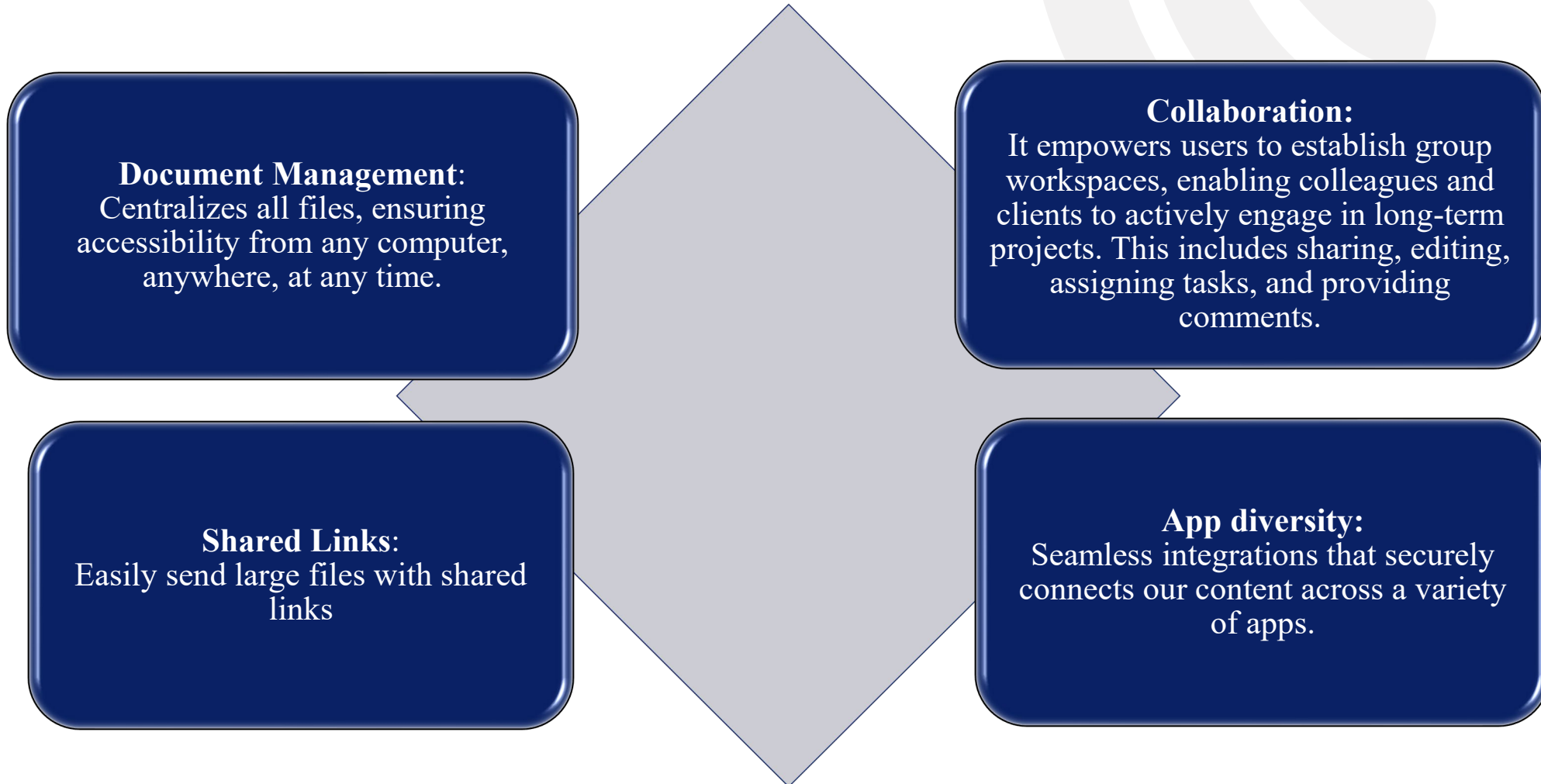
Vendor credentialing ensures all vendors meet the necessary compliance and safety standards before engaging in business activities with UAG. Working with vendors is more streamlined through the vendor management solutions, which allows us to reduce risk, manage payments, and negotiate discounts effectively.



## VENDOR CREDENTIALING

# THE BOX

A cloud-based file sharing software designed to facilitate seamless communication for both internal and external users.



# CONSERVICE

## UTILITY BILLING SOLUTIONS



ConService offers an extensive array of solutions that play a pivotal role in reducing operating costs and fostering conservation efforts.

**Utility Billing:** ConService efficiently manages utility billing processes, ensuring accurate and timely billing for residents.

**Conservation Services:** They provide services aimed at promoting conservation efforts within our properties, helping reduce resource consumption and environmental impact.

**Leak Detection:** ConService offers expertise in identifying and addressing leaks promptly, preventing wastage and damage.

**Vacant Billing:** Their services include billing for vacant units, ensuring that no utility expenses are overlooked during periods of vacancy.

**Cost Recovery:** ConService helps recover costs effectively, contributing to improved financial performance.

Residents also benefit from monthly insight into their accounts through ConService's convergent billing, which simplifies billing and payment processes, enhancing the overall resident experience.



## CONSERVATION AND COST SOLUTIONS

# NATIONAL CREDIT SYSTEMS

## DEBT RECOVERY



National Credit Systems plays a crucial role as a specialized collection firm dedicated to assisting in recovering funds rightfully owed to our clients. They focus primarily on helping recoup outstanding balances from former residents who have not fulfilled their lease obligations.

With a specialization in the multifamily housing industry since 1991, National Credit Systems is well-equipped to handle this unique area of collections. Their processes are seamlessly integrated into our operations, as former residents' balances are automatically provided to them 30-day after the resident moved out.





# TRAINING AND DEVELOPMENT

Our Training Department is dedicated to helping our teams succeed. This dynamic team covers training and support to ensure they have the tools and knowledge needed to excel.

## Policy and Procedure Training

- Comprehensive guidance on UAG's policies and procedures, ensuring everyone is well-versed in our company's standards and practices.

## Systems Training

- In-depth training on various system platforms, including Real Page, Human Resources, and the Box.

## Mentor Program

- Provide new employees with personalized, one-on-one training from the moment they are hired. This program pairs each new hire with an experienced mentor who will guide and support them through their initial stages of employment.

## Help Desk Support

- Our dedicated and knowledgeable Product Support Specialists are available to assist our teams whenever they encounter issues with system platforms or require assistance with any of our processes.



# COMPLIANCE

The Compliance Department at UAG is dedicated to maintaining the highest standards of regulatory adherence for our clients. Our in-house team continuously reviews and monitors state and local guidelines to ensure that our communities remain in full compliance with the ever-evolving landscape of regulations. Beyond keeping up with these changes, we actively assist our communities in preparing for upcoming inspections, whether through site visits or thorough file audits. Our commitment is to provide proactive and comprehensive support, ensuring that all UAG properties meet and exceed the required compliance standards.



# TRANSITIONS

The Transitions Team plays a pivotal role in facilitating smooth transitions during new business acquisitions or separations. With a strong focus on developing comprehensive transition plans, our team creates tailored application or infrastructure support models designed to meet the specific needs of each project. By carefully planning each corporate transition, we help ease the process for all involved, providing clear steps, identifying potential risks, and preparing for any unexpected discoveries along the way. Our goal is to ensure that every transition is managed with precision and efficiency, minimizing disruption and maximizing success.

# MARKETING

## UAG Branding

Maintain consistent logo usage across all platforms by providing a centralized folder with the correct logo versions. Regularly update email signatures and ensure a brand guide is available to all teams to uphold brand integrity.

## New Business Analysis

Conduct thorough financial reviews and prepare detailed new business analyses with financial projections. Utilize Costar reports to analyze property data and complete price structures for takeovers and renovations.


## Online Presence and Advertising

Set up and optimize all social media accounts, including Facebook, Instagram, and Google Business Profiles. Use tools like Canva for content creation and Meta Business Suite for scheduling posts. Implement and monitor PPC campaigns and update listings as needed.

## Client Relationship and Support

Maintain effective communication with clients, providing support for listing issues and changes. Establish and monitor client relationship management (CRM) systems, and ensure all users have access to necessary tools and resources. Provide training and troubleshooting assistance as required.





We truly appreciate the opportunity to share our vision and values with you. We look forward to a successful partnership and are excited about the possibilities that lie ahead.

Together, we can achieve great things.

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**THANK YOU!**