



# PROPERTY INCOME ADVISORS, INC.

Advisory Services for the Investor in U.S. Real Estate



## U.S. Real Estate Investment Advisory Services

Property Income Advisors, Inc. is a real estate advisory firm with professional expertise and a focused niche exclusively assisting Gulf-based clients in the investment and management of United States commercial real estate. Acting as a fiduciary to our client, we provide a turnkey real estate investment management platform, including advisory services for acquisitions, financing and sales, as well as comprehensive asset management capabilities. With offices in the United States and the Middle East, Property Income Advisors, Inc. undertakes a personalized and disciplined strategy designed for our clients to achieve real estate investment success.

We have nationwide experience and maintain strong national relationships to insure success in all of the major markets in the United States. Our clients consist of Gulf-based ultra high net-worth investors, family offices, private banks and institutions.

### Experienced Management

### Customized Investment Strategies

### Creation of Tax Efficient Holding Structures

### Shari'a Compliant Transactions

### Asset Management

### Acquisitions

### Financing

### Dispositions

### Consulting Services

## Experienced Management

*Scott A. Sweeney, CCIM, CPM<sup>®</sup>*, Chief Executive Officer, has more than 25 years of experience in U.S. commercial real estate management and investment. For the last 20 years, he has focused exclusively on advising non-U.S. clients on their U.S. real estate activities. His career experience includes the successful supervision of asset management activities for more than 13 million square feet of commercial real estate located in major markets throughout the U.S. valued in excess of \$2 billion. In addition, Mr. Sweeney has directed property acquisitions, dispositions, financings and lease transactions totaling more than \$3 billion.

*Dan Stockalper*, Managing Director, has responsibility for Middle East marketing and client relationships. Mr. Stockalper spent 14 years with Credit Suisse (1986 to 2000) based in Switzerland and the Middle East focusing on private clients in the Gulf. In 2000, Mr. Stockalper became the Head of Private Banking for Ahli United Bank in Kuwait and was responsible for assembling the private banking team. He was a Founding Board Member of Capital Management House, a Shari'a compliant investment bank located in Bahrain. On behalf of Falcon Real Estate, he was a long-time advisor to private clients in the Middle East looking to invest in U.S. commercial real estate. Since 2003, Mr. Stockalper has also been President of Securinvest Consultants, Inc. providing investment consultant services across all major asset classes to high net-worth individuals, family offices and institutions in the Gulf.



**Scott A. Sweeney, CCIM, CPM®**  
Chief Executive Officer

Office: 858.451.8125  
Cell: 619.507.8286  
ssweeney@propincadv.com  
www.propincadv.com

16880 West Bernardo Drive  
Suite 150  
San Diego, California 92127

## Customized Investment Strategies

Prior to recommending specific properties for acquisition by a client, Property Income Advisors will work with the investor to develop a customized investment strategy designed to meet the client's specific risk and return objectives.

## Creation of Tax Efficient Holding Structures

Working closely with our client's legal and accounting team, Property Income Advisors has a great deal of experience assisting Gulf-based investors in the creation of tax efficient holding structures. We often use the portfolio loan structure to provide Gulf-based investors with tax-free current income during the holding period.

## Shari'a Compliant Transactions

Property Income Advisors works with Shari'a advisors in the Middle East to structure Ijarah financing approaches that are acceptable from an Islamic standpoint.

## Asset Management

The asset management efforts of Property Income Advisors are focused on maximizing the value of each property. With experience in all of the major markets across the U.S., asset management assignments have covered office buildings, retail properties, logistic facilities, undeveloped land and residential complexes and addressed situations such as re-leasing vacant space, value-add strategies, operating expense control, environmental remediation, major property renovations and mortgage financing.

## Acquisitions

Property Income Advisors assists investors in the acquisition of U.S. commercial real estate. Working closely with the client, we establish acquisition guidelines and then seek properties that meet those parameters. With strong national relationships, we receive a continuous flow of property submissions from all of the major U.S. markets.

## Financing

Obtaining favorable mortgage financing on behalf of a client is another service provided by Property Income Advisors. While we have long-standing relationships with many mortgage lenders on a national basis and can work with them directly, we regularly use a select group of mortgage brokers to source loan quotes. These mortgage brokers deal with mortgage lenders on a full-time basis and this insures that the most competitive loan quotes are presented to the client.

## Dispositions

Selling a property is a complex task. Property Income Advisors can direct and supervise all aspects of the disposition process. We always strive to obtain the highest net sales proceeds for our clients.

## Consulting Services

When an investor needs recommendations on a course of action for a particular property, Property Income Advisors can undertake a detailed review of the property's operations and the market in which it is located. Specific recommendations in the form of an action plan are presented to ownership. Property Income Advisors can then supervise the implementation of the action plan.

*Property Income Advisors, Inc. is regulated and licensed by:  
California Department of Corporations – #C3463801  
California Bureau of Real Estate – #01914717*