

[Company Header/Logo Placeholder]

[Date]

[Recipient Name]

[Title]

[Institutional Entity Name]

[Address]

[City, State, Zip]

## **RE: PROPOSAL FOR INSTITUTIONAL REAL ESTATE PORTFOLIO STRATEGY SERVICES**

Dear [Recipient Name],

On behalf of [Firm Name], we are pleased to submit this offer to provide comprehensive portfolio strategy and advisory services for [Institutional Entity Name]'s real estate holdings. Our objective is to optimize risk-adjusted returns and align your physical assets with your long-term institutional mission.

### **1. Scope of Services**

The proposed strategy will include:

- Asset-by-asset performance diagnostic and benchmarking.
- Market analysis and exposure modeling (Geography, Sector, and Class).
- Capital allocation and recycling recommendations.
- ESG and sustainability integration planning.
- Risk mitigation and liquidity management strategies.

### **2. Financial Terms**

Our fee structure for this engagement is proposed as follows:

- **Onboarding/Discovery Fee:** \$[Amount]
- **Monthly Strategy Retainer:** \$[Amount]
- **Performance Incentive:** [Percentage]% of realized Alpha above [Benchmark Index].

### **3. Timeline**

Phase I (Discovery and Analysis) will commence within [Number] days of execution. A preliminary Strategic Portfolio Plan will be delivered by [Date].

### **4. Confidentiality**

This proposal and all associated data remain strictly confidential and are intended solely for the internal review of [Institutional Entity Name].

## 5. Acceptance

This offer remains valid until [Expiration Date]. To move forward, please sign below or contact our office to schedule a formal presentation of the engagement terms.

Sincerely,

[Signature]  
[Name of Principal]  
[Title]  
[Firm Name]

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### Accepted By:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_