



BEACON



Our best outcome is to find cost savings equal to our management fee. Added value, quality service and elegant delivery will be evident from day one.

Clearly, you are looking for specific performance deliverables and we're prepared to provide them.

We sincerely appreciate the opportunity to provide this information and demonstrate our capabilities.

**Steve Weibel**  
**Chief Executive Officer**  
**Beacon Management Services**

**Lisa Simmons Weibel**  
**President**  
**Beacon Management Services**



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## Beacon 10 Point Challenge



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## Beacon 10 Point Challenge

We call this a “challenge” because it takes management discipline and Board of Directors engagement in the process for it to be successful. Goals are not achieved without firm resolve on everyone's part. Half measures don't work. The entire strategy has to be deployed. All 10 Challenges have to be accomplished for optimal results to be achieved.

1. Have a goal to decrease energy consumption by 25%, measuring success by using the Energy Star benchmarking process for metro Atlanta.
2. At least annually benchmark performance on energy, water and waste reduction and report results to BOMA, IREM and EnergyStar.
3. Hire, train and establish goals and processes for all staff involved in building operations to insure that all equipment is properly installed, commissioned, maintained and utilized.
4. Perform an energy audit, and/or retro-commissioning of your building and implement low-risk, low-cost and cost effective strategies to improve energy efficiency with high returns. Educate owners on available programs and rebates within their condominiums. Deploy GREEN cleaning and maintenance practices where possible and financially prudent
5. Extend equipment life by improving the operations and maintenance of building systems and ensure equipment is operating as designed.
6. In-source staff to insure that employees work cohesively is properly compensated and play a specific role in the building's outcome.
7. Challenge every vendor cost and in-source where possible; purchase your own materials. Avoid anything with a markup.
8. Develop a reserve study by a competent third party. Establish alternative solutions and materials with the objective of avoiding in-kind repairs and instead replacing with synthetic and/or sustainable products that are less costly over time.
9. Produce high level financial reports that give correct snapshots of the present and project the near and long term future.
10. Translate all results to livability and property values.



## Delivers the Following Services

### **Building Operations and Management**

- Register your property with the Energy Star Program
- Financial Management
- Insurance review and fine tuning
- GREEN Purchasing

### **Life Safety/Security/Risk Management - Prepara**

- Emergency Disaster and Preparedness Plan
- Establish an Emergency Communication Network with Law Enforcement
- Code compliance
- Fire and Life System safety inspection protocols
- Evacuation plans and drills
- Written Security Procedure Manual
- Review Access Control and Surveillance systems

### **Training and Education**

- Licensing
- Continuing Education and Development
- Professional Designations
- Professional Memberships
- BOMA educational classes for engineers, managers and staff members

### **Energy**

- Energy Star Benchmarking
- Energy Star Products
- Building Energy Management systems and monitoring
- Energy Audit/System, recommissioning
- Adopt and adhere to Beacon 10 Point Challenge

### **Environmental/Sustainability**

- Waste Management and Recycling Policies
- Indoor air quality: EPA Guidelines for mold, VOC's and best practices
- Green cleaning and materials
- Exterior maintenance management

### **Resident Relations**

- Communication
- Education
- Reporting
- OnSite Team Customer Service Training



## How Do You Benefit from Our Services?

What We Do	How You Benefit
<b>Beacon 10 Point Challenge</b>	Undertake all the tasks necessary to find efficiencies and cost savings throughout the building.
<b>Establish Accounting System &amp; GAPP Standard Accounting</b>	Your financials are analyzed and converted to accrual for greater accuracy and transparency.
<b>Implement Technology</b>	Timely and user-friendly communication is a trademark of our online web-based technology. We post meeting minutes and allow you to view and manage a variety of other tasks, financial documents and announcements.
<b>Asset Manual</b>	We inspect and photograph the physical assets in your building, and tie directly to insurance coverage.
<b>Emergency Manual</b>	An emergency policy and procedures manual combined with the proper training enable onsite personnel to respond to critical situations where time is of the essence.
<b>Preventive Maintenance Program</b>	Proper maintenance extends the life of your buildings' systems and saves you thousands of dollars in replacement costs. We inspect, photograph and document every piece of equipment accompanied by the proper maintenance schedule. The fire pump, domestic water pump, electrical rooms and others areas are cleaned and painted using OSHA colors when required.
<b>Vendor Review</b>	We review all vendor contracts and renegotiate each contract when cost savings and/or better service can be achieved.



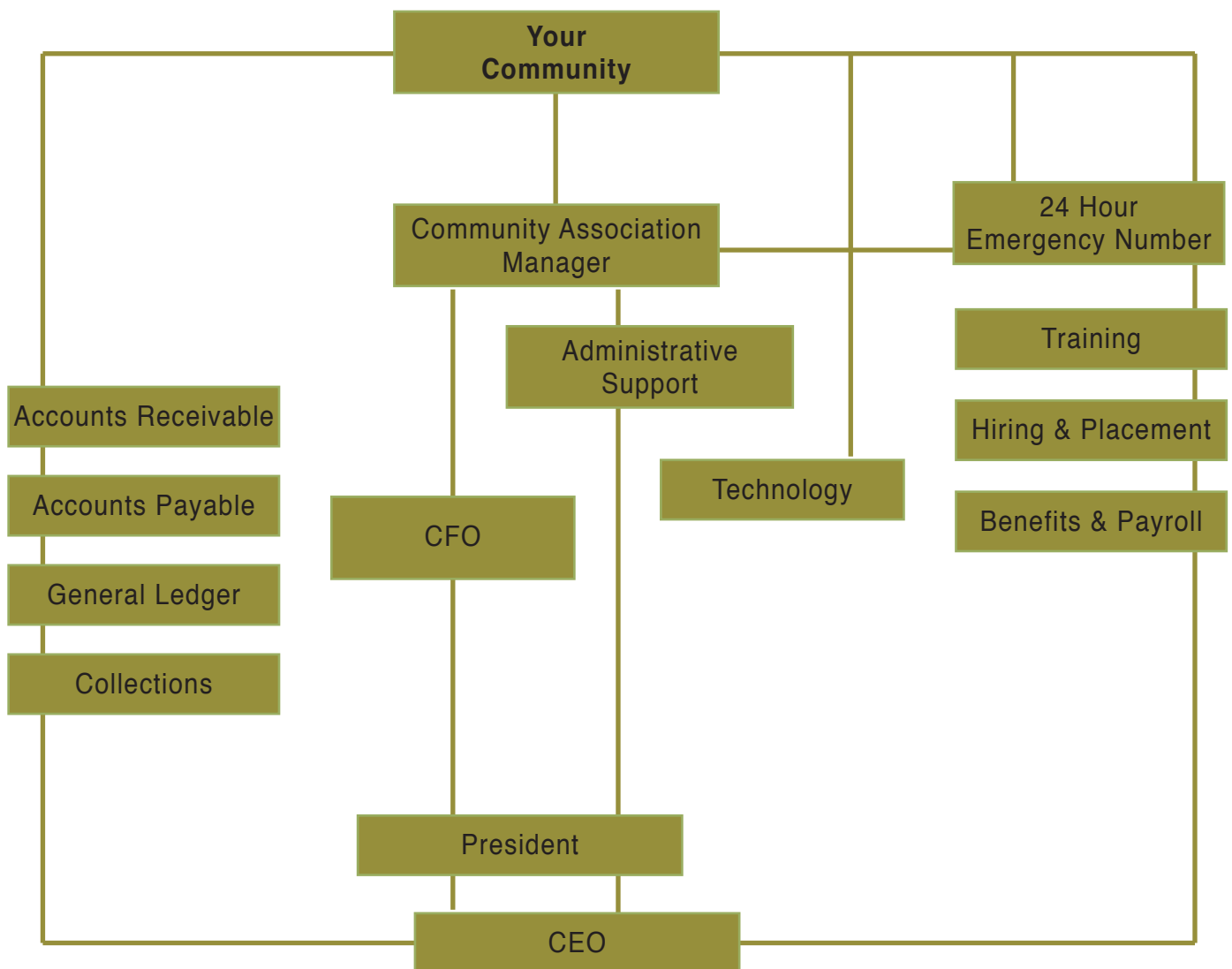
## How Do You Benefit from Our Services?

What We Do	How You Benefit
<b>Work Order System</b>	Work orders are easily tracked, managed and updated online. Many work orders include pictures and descriptions for quick reference by internal maintenance and external vendors.
<b>Inventory Control System</b>	Logs are updated with a list of all supplies needed to properly maintain the building. In order to avoid needless spending, the building engineer routinely tracks quantity and usage.
<b>Annual Calendar</b>	We complete one calendar showing all reoccurring items such as elevator inspections, fire alarm testing, pool cleaning, etc. Advanced scheduling ensures minimal disruption to homeowners.
<b>Written Job Descriptions and Training</b>	Performance standards are set with written guidelines. All Staff must review and sign their job descriptions.
<b>Comprehensive Property Inspections and Reports</b>	The property manager proactively inspects the property on a regular basis. A daily property inspection is done of all heavily used common areas. We generate an in-depth, monthly management report which is posted for Board review.
<b>Senior Management Oversight of Your Team</b>	Your staff reports to the Manager who oversees quality assurance and is ultimately responsible for your satisfaction.
<b>Green Management Practices</b>	We're committed to adopting more sustainable management practices in an effort to help our residents lead healthier, more environmentally friendly lifestyles. What's good for the environment is good for our residents.





## What Does Our Organizational Structure Look Like?



## Preventive Maintenance Extends the Useful Life of Mechanical Systems



Before



After



Before



After



## Proper Inspections Reveal Opportunities to Prevent Problems Before They Happen



Before



After



Before



After







## Senior Management Team



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### Steve Weibel Chief Executive Officer

Steve Weibel is the Chief Executive Officer of Beacon Management Services, an Atlanta-based company specializing in professional management of commercial and residential real estate, including homeowner associations, mixed use complexes, condominiums, and commercial properties. He has a 30-year history in the property management business during which he has founded, overseen and sold three successful real estate management companies in Atlanta and the San Francisco Bay area.

After a decade of growing his business, Steve sold Community One Associates in 2010 to FirstService Residential, a \$2B publicly traded residential property management company. Steve grew Community One to become one of the Top Ten Management Companies in Atlanta according to The Atlanta Business Chronicle. Prior to Community One, Steve was the CEO of Common Interest Management Services for 15 years, serving the entire East Bay area of San Francisco. He was responsible for managing a portfolio of upscale multifamily, high rise and single family communities. The community association business grew rapidly in California in the 1990's, and honed Weibel's management, financial, maintenance, construction, reserve study and consulting skills.

Steve is one of the most comprehensively educated managers in the United States. He was selected by the Building Owners and Management Association Georgia to serve as a Board Member and Executive Committee Member for the statewide organization. He was also selected to become an affiliate of Prepara, the industry's first subscription-based workforce preparedness platform and certification that delivers expert information, response protocols, communications, and training to protect businesses and their employees from 21st century threats.

The fundamental principle of his management agenda is forward planning, financial stability for all his clients, and problem solving generated through leadership. Raising the bar is not just a tag line, it's a real agenda.





### **Lisa Simmons Weibel** **President**

Lisa Simmons is a high performance professional with a record of accomplishments in commercial and residential real estate.

Before founding Beacon, she was the Vice President of one of the city's largest management companies where she helped build the multifamily property division which included a number of major high rise properties throughout Atlanta, including the ST Residential portfolio of assets.

Previously, she was a top producing sales manager for Beazer Homes (NYSE: BZH) where she sold in excess of \$40 million of real estate in four years which earned "Top Performer" recognition by CEO, Ian McCarthy. She appeared with McCarthy and other team members on the hit ABC television series, "Extreme Home Makeover". She was also instrumental in the success of two of their largest communities including Atlantic Station and Abbotts Bridge Place.

At the start of her real estate career, Lisa was a Senior Executive for Cousins Properties Inc. (NYSE:CUZ), a \$2 billion Real Estate Investment Trust (REIT) for thirteen years. She oversaw the marketing and leasing support for many of Atlanta's most notable commercial, retail and land developments including Bank of America Plaza, Concourse Office Park, Wildwood Office Park, The Pinnacle, The Avenue Lifestyle Shopping Centers, North Point MarketCenter, Northside Medical Complex, and One Georgia Center.

Lisa graduated from the University of North Carolina at Chapel Hill and holds an active Realtors License in the State of Georgia. She is a member of CAI and frequently quoted in business publications and the Atlanta press for market insights and information. She is a former Board member for Commercial Real Estate Women, the National Association of Industrial and Office Parks, and the Millard Fuller Center for Affordable Housing.

Lisa is married to Steve Weibel and lives in Atlanta, Georgia. When she and Steve aren't working, they enjoy riding Harley Davidson motorcycles.



## In The News

### Lisa Simmons Weibel Quoted in The Atlanta Business Chronicle

Pages 100B • February 27/February 28, 2013 www.atlantabusinesschronicle.com ATLANTA BUSINESS CHRONICLE

## Georgia-Pacific starts huge Henry project

Georgia-Pacific Corp. is building a 900,000-square-foot distribution center in Henry County — one of the largest industrial real estate projects in months.

Georgia-Pacific will use the center for its consumer products business. The project is likely a consolidation of other G-P operations, continuing a trend of similar consolidations across the Southeast as companies reconfigure their distribution networks, some to save costs, others to align themselves better for a shift to more online sales.

G-P confirmed the project but declined for now to release information about its distribution network. The Atlanta-based paper products giant will locate the distribution center at 493 Westridge Parkway in Henry County.

The site is owned by Panattoni Development Co. It will develop the project and lease the building to G-P.

### G-P's 900,000-square-foot project

The company picked a 60-acre site in Henry County.



Source: Staff research

Panattoni picked **Ordner Construction Co.** as the general contractor. Mike Gray of Panattoni declined comment.

G-P acknowledged a project was in the works, but provided no comment to Atlanta Business Chronicle.

The distribution center reflects that companies are once again either scouting metro Atlanta or launching major industrial projects across the region. In Georgia, companies are seeing a dwindling supply of new industrial buildings developed in the last cycle and that trend has some developers vying for build-to-suit projects.

transaction, **Crescent Heights** is the buyer, according to sources.

The company could not comment, said Roman Speron, operations manager at Crescent Heights. The developer is known for intown Atlanta projects including the 34-story Mayfair Renaissance.

The Atlantic's owner, **ST Residential**, an affiliate of Starwood Capital, and Crescent Heights have struck a similar deal in the past year. Last summer, Crescent paid \$50.4 million for the remaining 241 units in the Tao condominium in Sunrise, Fla., according to South Florida Business Journal, a sister publication of Atlanta Business Chronicle.

It's unclear whether Crescent Heights will try to sell the remaining Atlantic units or convert them to rentals.

The deal underscores ongoing volatility in the condo market, and that will cause buyers to proceed cautiously when making a purchase, said Lisa Simmons, president of **Beacon Management Services LLC**.

ST said it sold 73 units since taking over The Atlantic tower in 2010, but in a statement it said sales had not been at the pace it had hoped. It was fetching, from \$173,000 to \$723,033 for the condos in 2011, said Kevin Grieco.

Homes in Atlanta fall that 40 of the little more began a significant rise in the metro area. The deal as sales less than

said, ST Residential may have adjusted prices quickly enough on unsold units, and the number of units it had to sell within The Atlantic simply have proved too large, observers said.

In 2010, ST Residential formed amid the wreckage of Chicago's failed Corus Bank and began to market Corus' former residential real estate assets, including six in Atlanta.

ST Residential is led by Greenwich, Conn.-based Starwood Capital Group, private equity firm TPG of Fort Worth, Texas, and WLR LeFrak and Perry Capital.

ST Residential said it remained confident in the strength and momentum of the Atlanta market and is continuing to execute its strategy for its other properties.

### HAROLD DAWSON'S LEGACY.

Developers look for returns on their investments.

Many seek the answer in their financial statements. Harold Dawson Sr. sought it in the number of jobs his developments created — and in the people they united.

Dawson Sr., 76, one of Atlanta's most influential real estate developers, died Jan. 19.

Memorial services are set for Jan. 27 at 11 a.m. at the Martin Luther King Jr. International Chapel at Morehouse College.

Dawson was founder and chairman of **The Dawson Co.**, and he was instrumental in developing University Plaza Apartments, the first luxury high-rise dwelling in Atlanta University Center. He was also involved in the removal of the controversial Peyton Wall, an intentional barrier that separated southwest Atlanta's white neighborhoods from surrounding minority communities. Dawson Sr. became the first African-American to serve on the Georgia Real Estate Commission when he was appointed by then-Gov. Jimmy Carter in 1972. The Dawson Co. was at the forefront

properties, three of which are located in Peachtree Corners and a fourth in North Fulton.

■ **CWCapital** for its 111,323-square-foot John's Creek Corporate Campus.

■ **C-III Asset Management** for its 88,750-square-foot Barrett Office Center in Atlanta's northwest submarket.

■ **Helios AMC** for its The Carpets of Dalton complex. A Transwestern team has secured a 280,342-square-foot lease with anchor tenant Hennon Carpets LLC.

Transwestern now leases and manages more than 28.2 million square feet out of Atlanta, said Bruce Ford, president in Atlanta and the Southeastern region.

If you have news for Real Estate Notes, contact Douglas Sams at (404) 249-1055 or at dsams@btjournals.com.

## REAL TALK



Atlanta Business Chronicle's top Real Talk blogs for the week of Jan. 23 were "Bank of America Plaza and the 'Bad Economy' by Dan, a real estate analyst and Asbill & LLP," "The new Atlanta area 'y' by Mark, a partner at an Sanders & company is sitting. Wes Hudson of Raznick Group. Real Talk blog offers the region's top real estate players a space to post their ideas and insights about the industry and where it's headed. Check it out at [www.bizjournals.com/atlanta/real\\_talk](http://www.bizjournals.com/atlanta/real_talk).

## The deal underscores ongoing volatility in the condo market, and that will cause buyers to proceed cautiously when making a purchase, said Lisa Simmons, president of Beacon Management Services LLC.



**Dawson**  
The Dawson Co.  
he was with how much money those projects were going to bring to a developer."

### TRANSWESTERN GROWS.

Transwestern's Atlanta office has won 1.2 million square feet of new leasing and property management assignments across metro Atlanta for various ownership groups including:

■ **Rosemont Realty** for its portfolio of office buildings totaling 398,369 square feet. The portfolio consists of four

## THE DEAL LOG

► Urban Design Group will lease 7,518 square feet ► Parkway Properties Inc. (NYSE: PKY) has sold



### **Bruce Grant** **Chief Financial Officer**

Bruce Grant is a Georgia native, holds an undergraduate degree in Accounting & Finance from the University of Georgia, an MBA from Emory University and is a Certified Public Accountant (CPA). Bruce was the Chief Financial Officer of Community One, where he oversaw a large team of professionals in the accounting department.

Prior to joining Beacon, he was responsible for the financial oversight of many of Atlanta's notable developments including Spire, Realm, Horizon at Wildwood, Serrano, Windermere, Cosmopolitan, Ansley Above the Park, Cross Creek and Mid City Lofts and a number of large masterplanned communities!

For those clients who have exceptional needs, complicated budgets or cash flow issues, Bruce creates customized Excel reports to help our forward thinking boards better understand the financial demands and cash flow needs of their communities. If you have a problem we can likely craft a clear, easily understandable report for you. Bruce works directly with any Board that needs his expertise. Clients who struggle with cash basis financials or unreadable, indecipherable financial reports find a friendly environment here.





**Technology**



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## **Infrastructure:**

Our platform program allows all our clients, with the use of an encrypted password and login, to access data about the property to provide specific services to the owners and the board.

- ⇒ Board of Directors Dashboard
  - Financial information
  - Owner data
  - Archived Data
  - Work Orders
  - Other administrative reports
- ⇒ Homeowners
  - Online access to ledgers
  - Bill pay features: ACH, e-check, credit card pay, recurring auto draft
  - Access to minutes, documents, newsletters, etc.
  - Many other features
  - Access control

## **Front Desk:**

- ⇒ Package tracking
- ⇒ Email notifications
- ⇒ Access control systems
- ⇒ Camera access through our control panel
- ⇒ Incident reporting and best practice response
- ⇒ Online emergency management training

## **Incident Reporting:**

- ⇒ Add on program resident on front desk screen to record any incident that happens on the property. Manager and Board (if requested) can access incident reports online or on a Smart Phone app to keep current on non-routine matters in the building.
- ⇒ Keeps a paper trail of all incidents and is an excellent risk management tool





## **Standard Operating Procedures Tool:**

We train out staff to do many things and cross train them with our building engineer to know how to deal with critical systems, water issues, fire and any incident that can occur in a property. But we don't leave the critical thinking to chance or memory, we actually document the appropriate response to an emergency so that the staff person simply reads and responds.

⇒ It works like this:

- Water begins to leak on 10th floor
- Front Desk person accesses Emergency Response Tool resident on desk top or Smart Phone
- Drop down menu: water leak
  - Instructions right there to tell them precisely what to do.
  - Includes page in Emergency Manual at the Front Desk about exactly where water shut off is located and who to contact immediately.

⇒ Most buildings are built similarly, but water shut off valves, as an example, are notoriously inconsistent and differ by building. We leave nothing to chance

⇒ By following an easy to access procedure fewer mistakes are made and memory is not the first line of defense.

## **Emergency Manual:**

The emergency manual is a critical tool for every building. You may already have one. Regardless, we will check for accuracy and update within 30 days of start. Nothing is more aggravating than an alarm sound that no one knows how to disable.

⇒ The manual is posted online for easy review by board members, maintenance, Management and Front Desk.

⇒ Monthly emergency systems training is done with Front Desk and maintenance personnel.

## **Real Estate Sales and Leasing Data**

⇒ Quarterly Condo Sales Reports for Buckhead and MidTown Markets

⇒ Leasing Comparables Reports if requested

⇒ Benchmarking \$/SF condo rankings in comparable buildings provided to Board of Directors and to owners if requested





## Management Services



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## Services Included in Our Monthly Fee

### I. Association/Community Management Services

On Site Staff (if applicable)	yes
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### II. Financial Services

Determine Assessment Requirements	yes
Accounts Receivable	yes
Manage Daily Bank Accounts	yes
Accounts Payable	yes
Billing	yes
Budget Preparation	yes
Coordinate Tax Preparation	yes
Monthly Late Notice to Owners	yes
Financial Statements	yes
Cash Statement	yes
Monthly Income Statement	yes
Monthly Late Pay Notice	yes
Annual Statement to Owners	yes
Monthly Expense Statement	yes
Contact Late Pay Residents and Note CRM	yes
Collections	yes
Individual Accounting Records per Unit	yes
Mail Late Statements	yes

### III. Administrative Services

Maintain Official Records	yes
Organization of Annual Meeting	yes
Attendance of Meetings	yes
Manager Report and Agenda	yes
Enforcement of Gov. Documents	yes
24 hour Answering Service	yes
Negotiation of Contracts	yes
Insurance Administration	yes
Distribution of Meeting Minutes	yes
Calendar Notices for Meetings	yes
Update and Maintain Association Web Site	yes
Assistance to Board of Directors	yes
Technology/IT	TBD



## Services Included in Our Monthly Fee

### IV. Onsite Services (if applicable)

Property Inspection	yes
Management of Staff	yes
Association Liaison with External Community	yes
Resident Communication	yes
Administration of Preventative Maintenance Plan	yes

### V. Oversight of Repairs

Vendor Insurance Verification	yes
Identify non routine maintenance requirements to Board	yes
Training of Management Staff	yes
Property Manager Insurance Bond	yes
Evaluation and Recommendations for Security	yes
Evaluation and Recommendations for Concierge	yes
Monthly Fees	yes





## Qualifications and Credentials



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## Information about Beacon FAQ's

### 1. Describe the services you provide for a monthly fee:

We offer a full range of property management services, providing your condominium or homeowner association with the service level you need – from basic accounting to full-service management. Our licensed real estate professionals have encountered and dealt with every facet of the housing industry, giving us a wealth of training and tested experience that we can share with you.

#### Our Services Include:

- ▶ Maintenance of Official Records
- ▶ Organization of Annual Meetings
- ▶ Minutes
- ▶ Manager's Report
- ▶ Assistance in the Enforcement of Governing Documents
- ▶ Coordination of State and Federal Tax Filings
- ▶ General Correspondence and Membership Mailings
- ▶ 24-Hour Answering Service
- ▶ Property Inspections
- ▶ Supervision of On-site Personnel
- ▶ Supervision of Contractors
- ▶ Negotiation of Contracts
- ▶ Accounts Receivable
- ▶ Collections
- ▶ Maintenance of Bank Accounts
- ▶ Preparation of Financial Reports and Record Keeping
- ▶ Billing
- ▶ Annual Budgeting
- ▶ Strategic Planning



**2. Can your firm offer coupon, auto-pay (EFT) or email billing as assessment payment options?**

Yes

**3. Can your firm accept credit cards and online payments? Can I see my account ledger online?**

Yes

**4. How do you store and protect digital and hard copy vital records?**

Electronic information is stored on servers that have redundant back-up applications. These on-site back-ups are coupled with a policy that requires nightly off-site storage of the information as well. Hard copies of financial records are maintained for seven years in accordance to Federal IRS standards, one to three years for other documents that fall with in State Statute requirements. All lot file information will be maintained on-site with Architectural matters maintained indefinitely and all other items saved until ownership of the property changes.

**5. What bank do you use?**

Our clients maintain their operating accounts with Union Bank. All other funds may be maintained in other FDIC insured institutions.

**6. Does your firm provide investment services on reserve accounts?**

Beacon Management Services gathers information from our pool of FDIC insured financial institutions that we have partnered with across the country and provides the information to our Board members. Furthermore, we assist in providing qualified experts in investments if requested by the Board of Directors.



### 7. Do you provide 24/7 emergency services support?

Yes

### 8. Does your firm provide assistance/facilitation for strategic planning?

Part of our commitment to our customers and is a start up process which includes the following:

1. Evaluation of the physical site and a written report to the board about conditions found and proposed solutions
2. Review of the financial health of the property compared to the reserve study and any undocumented liabilities
3. Funding strategies for both operating and reserve expenses
4. Evaluation of all human resource usage and options for same
5. Evaluation of all maintenance practices, including inventory control and purchasing, along with maintenance theory, which may be improved

We also initiate a process evaluating proposed capital improvements, common area expansions, or changes to the property which recognize demographic or economic needs. Sustaining or improving long term real estate value is the outcome by which all these measures are indexed. In addition, evaluating the relationship with local authorities and the business community is an important part of establishing long term property values.



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### 9. What is your process for evaluating staff members?

Part of our start up plan for every community is to evaluate human resource use. Our goal is to improve service while capturing cost. Labor is an important and expensive part of this equation. Many communities learn that more can be done with less and the outcome can actually improve.

### 10. What distinguishes your firm from your competition?

Experience and results. We deliver BOTH with elegance and style.

We foster a partnership through open and honest communication. We also have the technical expertise and know how to deliver solid financial performance. Our company is truly customer centered. We serve ourselves by serving you. We gauge our own success by the wins we can introduce to the community. It's a personal agenda with us and how we differentiate. Plus, it is the right thing to do.

Beacon's leadership in community management is founded on talented employees effectively applying sound business practices. We demonstrate leadership through competence, creativity and teamwork. We practice clear, two-way communication and foster a positive working environment that encourages growth.

Our services are "best in class" in terms of value received for dollars paid. We deliver excellence, strive for continuous improvement and respond ardently to change. Each team member takes ownership and responsibility for the quality of service provided to our clients.

Precise financial systems, sound budgeting practices and adherence to GAAP assures that the financial statements are accurate and provide an essential tool for the Board of Directors in developing and maintaining a long-term business plan.

