



CONSULTING

BUSINESS ADVISORS AND TECHNOLOGY SOLUTIONS

Sage

# Better Real Estate Management With Sage Intacct

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# Presenters

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KEVIN SHIVES

» Partner

With over 20 years of experience, Kevin has held senior finance and management positions in various high-tech companies in the Bay Area. Kevin has significant experience providing clients with highly effective and cost-efficient corporate governance, internal audit, Sarbanes-Oxley (SOX) solutions, accounting systems, and process optimization solutions. As a leader in SSF's technology and consulting practices, Kevin supports clients in developing process optimization solutions and implementing software solutions.



TOM ACHOR

» Sr. Solutions Consultant

With over 30 years of experience, Tom Achor, specializes in delivering accounting support and helping clients evaluate, implement, and optimize cloud-based financial and ERP software investments. Tom brings a deep understanding of accounting challenges that businesses face as well as current and emerging tools and technologies to meet those challenges.

# Presenters

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## PERRY LEVINE

### » Principal

Perry Levine began his real estate career in 1982 and he has worked for a variety of organizations ranging from local developers to a Wall Street listed REIT. His real estate career encompassed leadership roles and involved him in all aspects of the real estate business (including accounting, property management, development, leasing, acquisitions, dispositions, and financing). Throughout his real estate career, he has worked with many asset classes, including residential (multifamily, SFR, mobile home parks), commercial and specialty properties. In addition to his industry experience, Perry has worked at numerous real estate technology firms including Yardi, RealPage, and MRI in a variety of roles.

# Agenda

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- Introductions
- Overview of Sage Intacct
- Sage Real Estate Property Management
- Q&A



# Firm Overview



## TAX

Individual & Business • Preparation  
Planning • Representation • Appeals  
M&A • Multi-State & International



## AUDIT

Audit • Assurance • SOX Compliance  
Employee Benefits Plan



## TECHNOLOGY CONSULTING

Assessment • Implementation • Integration • Support



## BUSINESS ADVISORY CONSULTING

Outsourced Accounting • Executive Placement • Internal Audit /  
SOX • Sustainability

## HIGHLIGHTS:

- » 40+ Years in Business
- » US & International Clients
- » Thousands of hours dedicated to community service each year
- » Five locations throughout California



# SSF Consulting Overview

## TECHNOLOGY SOLUTIONS

INTERNAL AUDIT / SOX

OUTSOURCED ACCOUNTING



## TECHNOLOGY SERVICES:

- » Assessments
- » Implementation
- » Upgrades
- » Integration
- » Support

## CERTIFIED PARTNER:

Sage

LEASE<sub>UP</sub>RUNCH

Avalara

BLACKLINE

Bill.com

limelight

# Benefits of Sage Intacct ERP

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- Native cloud, no on-premise server or IT management
- Quarterly Update release schedule
- 99.8% guaranteed uptime, fast system response
- Open APIs for more integration opportunities – now and in the future
- Sage Intacct Marketplace partners (200+ approved partners)

# Sage Intacct Marketplace

<b>AP Workflow</b> 	<b>AP Payments</b> 	<b>AP Purchasing</b> 	<b>AR Automation</b> 	<b>Budgeting &amp; Planning</b> 	<b>Inventory Management</b> 	<b>Time, Expense, Travel, Attendance</b> 
<b>Document Management</b> 	<b>Donor / Grants Management</b> 	<b>EDI</b> 	<b>Close Management</b> 	<b>Fixed Asset &amp; Leasing</b> 	<b>HCM &amp; Payroll</b> 	<b>Commission &amp; Incentive Compensation</b> 
<b>Manufacturing</b> 	<b>Payment Processing</b> 	<b>Project Management</b> 	<b>Field Service Management</b> 	<b>AI / Analytics / Reporting</b> 	<b>Restaurant Management</b> 	<b>Association Management</b> 
<b>Checks &amp; Supplies</b> 	<b>Spend / Cash Management</b> 	<b>Tax Management</b> 	<b>CRM</b> 	<b>Tools</b> 	<b>Wealth &amp; Asset Management</b> 	<b>Professional Services Automation</b> 

200+ Partners

75% of our customers integrate with 2+ partners



# #1 in Customer Satisfaction Year After Year



Since 2015, users rank Sage Intacct as a **clear leader** in:

- Satisfaction
- Product direction
- Likelihood to recommend
- Ease of use
- Ease of doing business with

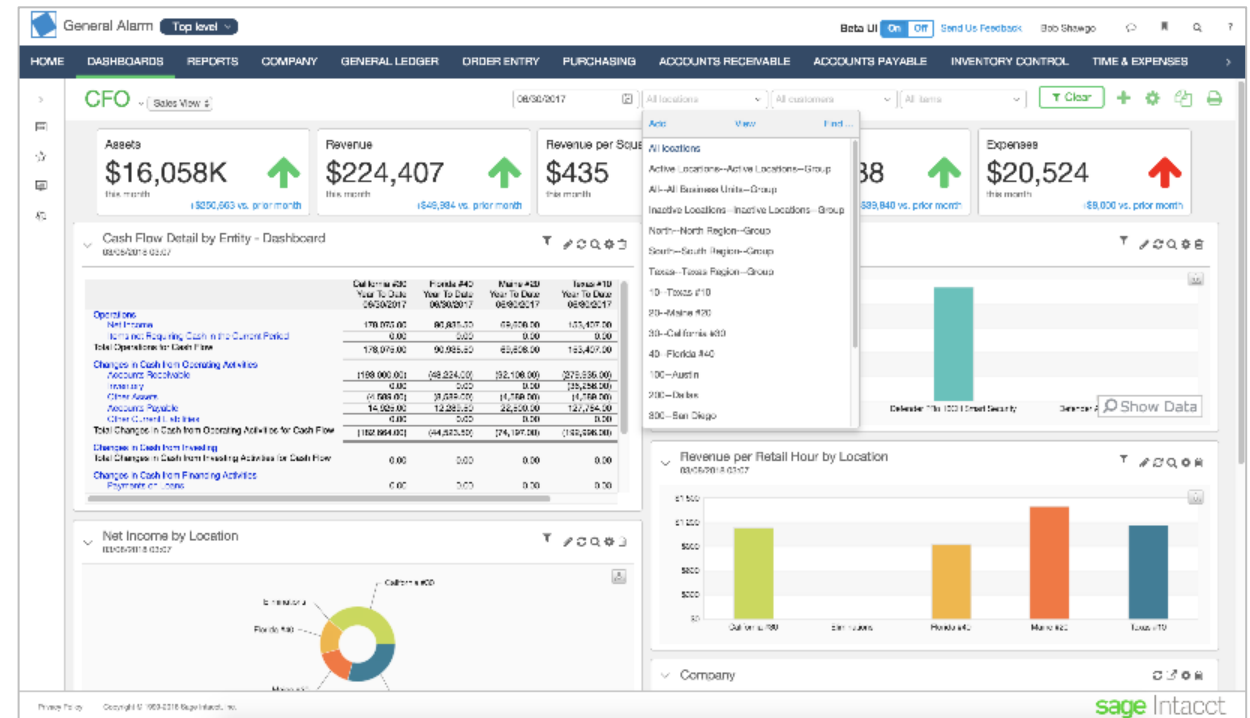
And more!

# Only Solution Preferred by the AICPA

Of all the systems reviewed, only Sage Intacct is preferred.



The AICPA “wrote the book” on accounting



# **Solution Presentation**

# Sage Intacct for Real Estate

Sage Intacct for Real Estate gives real estate owners and operators a 360-degree view of the financial and operational facets of their assets which allows them to:

- Capture all revenue opportunities
- Monitor and communicate performance
- Increase property and portfolio value
- Grow their business





# Sage Intacct for Real Estate

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Sage Intacct for Real Estate is a scalable solution that can grow with your business, drive workforce efficiency with state-of-the-art technology, and provide unmatched reporting capabilities for stakeholder communication – all for a lower total cost of ownership.



# Top 4 Issues in Real Estate Today

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## What We're Hearing From Clients

1. Information output
  - Reporting to stakeholders
  - Information silos
2. Employee satisfaction
  - Recruiting, hiring, retaining, nurturing talent
  - Ease of use / navigation / learning curve
3. Increasing portfolio value
  - NOI / cash flow
4. Tenant or resident relations
  - Lease administration

# 1. Information Output

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- Information Transparency
- Reporting to stakeholders
- Information silos
- Data accuracy



# 1. Information Output

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Good



## 2. Employee Satisfaction

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- We're graying out as an industry
- How do you recruit talent when technology is important to the user?
- As you expand your business, how easy will it be to retain or train?

A recent survey by Aruba Networks (a study of 7,000 employees) showed that employees who were fully enabled by technology were 51% more likely to have strong job satisfaction and 43% were more likely to have positive attitudes towards their work / life balance.

# 3. Increasing Portfolio Value

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- Are you sure that you're maximizing ALL revenue opportunities?
- Increasing NOI
- Controlling and monitoring spend
- Understanding that it is not just the NOI that counts – it is the total value of the property and the portfolio!



# 4. Tenant/Resident Relationships

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- Happy tenants are good tenants
- Lease administration
- They're stakeholders too!
- Proactive communication
- Data accuracy

# **Solution Presentation**



# Questions & Answers

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# | Thank You!

**For questions or to request a personalized demo, contact us:**

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