

## Helvetic Trust Real Estate Services

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### Services

When it comes to the active management of real estate assets, we focus on the same basic principles as those which apply to the administration and enhancement of comparable assets: achieving the optimum balance between yields and value preservation is paramount. The basis is always a so-called “asset allocation” – that is to say a situation analysis focusing on the requirements, means and opportunities of the investor.

Our services address the entire real estate value adding chain.

- > Real estate research
- > Real estate development
- > Portfolio consolidation
- > Utilisation concepts
- > Brokering, purchase and sale

### **Real estate research**

The holding and selling of real estate is certainly no longer the preserve of craftsmen armed with real estate liens!

The systematic observation and interpretation of changes on real estate markets is the basis for professional investment decisions. On your behalf, we analyse groups of properties and regions in order to determine the best possible timing for investments or divestments.

### **Real estate development**

We accompany you through every individual phase in the life of a property. From the undeveloped site through temporary utilisation or conversion to the active management or sale of existing or planned properties of a private or commercial nature.

We develop first-time and follow-up utilisation concepts on the basis of market observations, search out and identify suitable objects, evaluate these and conduct both purchase as well as sales negotiations. In other words: the best possible use is made of the available potential, and this is realised in line with the overall investment strategy.

### **Portfolio consolidation**

Real estate markets are subject to an ongoing process of change, and the same applies to the requirements, means and opportunities of investors. For this reason it is necessary to examine real estate portfolios on a regular basis, and if necessary to make corrections. We have at our disposal the fundamental expertise, the experience as well as the discretion and tact necessary to analyse real estate portfolios from professional perspectives, and to initiate as well as to implement any necessary adjustments.

### **Utilisation concepts**

The peripheral environment can exert a significant impact on the value of real estate properties: what only a few years ago was considered a run-down worker's quarter can suddenly be transformed into a hip place to live. And what was trendy yesterday can just as easily become unfashionable tomorrow.

It is important to be aware and to take proper account of such changes. For example, does it make sense to put a property to new use, to proactively change the quality of the tenants, to pursue a long-overdue conversion, or to consider a sensitive refurbishment?

We also accompany you during such decisive phases, and make sure that investment and utilisation decisions are indeed implemented in line with the overall strategy.

### **Brokering, purchase and sale**

The specialists at Helvetic Trust have been active in the real estate market for over 20 years, and have a correspondingly strong network of contacts within the sector. For this reason, we are able to fulfil the wishes of our clients with respect to the purchase, sale or brokering of real estate properties professionally and with great personal commitment and dedication.

Furthermore, we are able to draw up realistic estimates of the value and potential of real estate assets, and can provide corresponding recommendations for action. In addition, we draw up sales dossiers and accompany our clients through every stage of such transactions.

We are also able to provide you with support when it comes to questions of finance, refinance, sale-and-leaseback deals and – last but not least – can offer you a second opinion.

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