




# GLOBAL ADVISORY & TRANSACTION SERVICES

TRANSACTION MANAGEMENT EXPERTS



**CBRE**





“I have found that CBRE is a magnet for talent globally:  
CBRE represents the gold standard.”

— DIRECTOR OF REAL ESTATE, HUNTSMAN



# MEET THE **LARGEST** **GLOBAL TRANSACTION** **ADVISORY TEAM** IN UTAH

We advise national and global users of real estate. We execute the full range of commercial real estate transactions—acquisitions, dispositions, leasing, sale-leasebacks, build-to-suits, alternative financing structures, property use agreements—across a client’s geographic footprint. Our clients’ workplace goals and objectives drive our execution strategy, informed by account portfolio data and industry-leading local talent and market research.

Specific expertise in:



NON-PROFIT



TECHNOLOGY  
& MEDIA



RETAIL



FINANCIAL  
SERVICES



MINING



PUBLIC  
SECTOR



HEALTHCARE



HIGHER  
EDUCATION

**11** GLOBAL TRANSACTION MANAGEMENT EXPERTS  
**8** BILINGUAL SPECIALISTS

## 2019 BY THE NUMBERS

**175**

TOTAL TRANSACTIONS

**\$378M**

TRANSACTION VOLUME

**29**

COUNTRIES

**1.3M**

SQUARE FEET

**300**

ACRES



# THE GLOBAL TRANSACTION MANAGEMENT TEAM



**DAVID BAUMAN, MBA**<sup>SP</sup>  
Director

David oversees client relations, develops transaction management strategies for global clients, and directs business development for Transaction Management and Global Workplace Solutions in CBRE's Salt Lake City office. He has deep experience in national and international real estate transactions and has advised clients on nearly \$1B of real estate since entering the industry in 2006.



**ERIK SIMPER, MBA**<sup>SP</sup>  
Senior Transaction Manager

Erik leads strategic initiatives for various global occupier accounts. He possesses extensive site selection experience, having overseen accounts for retail, office, industrial, and institutional occupiers since beginning his career in 2007. Clients have trusted him with headquarters relocations, complex consolidation strategies, and highly confidential special projects.



**KREG PETERSON**  
First Vice President

Kreg Peterson is one of the founding members of the Salt Lake City-based transaction management group and a seasoned real estate professional. He continues to support the team by providing strategic consulting, developing further business, and working to retain existing client accounts.



**JOSEPH SANCHEZ**<sup>SP</sup>  
Transaction Manager

Joseph specializes in site selection and lease strategy, primarily in the U.S. and Canada. He also provides transaction execution oversight in Latin America, ensuring high quality and streamlined service to global clients. Prior to this role, Joseph was part of CBRE's Asset Services group, providing property management services to institutional office investors.



**JACE ALLEN**  
Transaction Specialist

Jace has worked extensively on office and retail leases in markets throughout the nation. He also coordinates due diligence on international properties and conducts strategic portfolio analysis for clients. Jace is experienced in a variety of value-add technologies, including tools distinctive to the CBRE platform.



**CHERYL EYRE**<sup>SP</sup>  
Transaction Coordinator

Cheryl conducts detailed research and compiles visual presentations on potential sites for client acquisitions. She plays a vital role in process management and broker selection worldwide. Prior to her current role, Cheryl provided property management services to institutional investors of office and retail properties.



**CURTIS CARLSON**<sup>SP</sup>  
Senior Transaction Manager

Curtis brings expertise to global clients with an emphasis in Asian and Latin American markets. Curtis partners with CBRE's regional transaction management hubs to drive consistent delivery to global clients. Prior to transaction management, Curtis was part of CBRE's Research and Brokerage divisions.



**BRAD DAVIS**<sup>P</sup>  
Transaction Manager

Brad leads multi-market transaction management and lease administration for several global leasing clients. He has broad leasing experience in office, industrial, and retail properties and utilizes his fluency in Portuguese to directly assist clients in foreign markets.



**JUDD TIDWELL**<sup>P</sup>  
Transaction Manager

Judd specializes in site acquisitions and excess property disposal across national and global portfolios, with a focus on helping clients develop multi-market strategies. He also has extensive experience in the Asia Pacific and Europe markets, aided by his fluency in Portuguese.



**DALLIN VALLEJO**<sup>SP</sup>  
Transaction Coordinator

Dallin assists with lease administration for global clients and works directly with local area experts across the country to gather and maintain market information. He also provides international transaction support in the Caribbean and facilitates property marketing efforts on behalf of clients.



**RACHEL SANDORF**  
Senior Administrative Assistant

Rachel provides administrative support for the CBRE Salt Lake office's transaction management team and its clients. Her role includes transaction process support, financial reporting and accounting, and data analysis. She also leads digital marketing campaigns and maintains listing databases.



## LANGUAGES SPOKEN

- P** PORTUGUESE
- SP** SPANISH



# OUR SERVICES

**TRANSACTION MANAGEMENT**  
Portfolio-wide planning and execution of leasing, acquisition, and disposition services

**FACILITIES MANAGEMENT**  
Over 4.2 billion feet of space managed around the world in 2019

**PROJECT MANAGEMENT**  
1,850 project managers managed 50.6 billion of capital expenses in 2019

**LEASE ADMINISTRATION**  
160 client portfolios managed, with employees overseeing compliance and critical dates on 160,000+ of our clients' leases in 2019

**LABOR ANALYTICS**  
Thought-leadership and consulting expertise to improve location decisions of occupiers to access talent

**WORKPLACE STRATEGY**  
Designing the workplace to drive business performance in both financial and non-financial terms

- OTHER SERVICES**
- Right of Way Negotiations
  - Portfolio Optimization
  - Market Research
  - Due Diligence Management
  - Economic Incentives
  - Capital Markets
  - Energy & Sustainability



- GLOBAL HIGHLIGHTS**
- 100+ Countries
  - 530+ Offices
  - 100,000+ Employees
  - \$432.8 Billion Total Transaction Value
  - \$124.3 Billion Assets Under Management
  - \$13.0 Billion Development in Process

# CBRE INDUSTRY RECOGNITION

**14**  
YEARS IN A ROW  
Ranked among the top few outsourcing service providers, across all industries  
THE GLOBAL OUTSOURCING 100 – IAOP

**#1**  
BRAND 19 YEARS IN A ROW  
THE LIPSEY COMPANY

**4**  
YEARS IN A ROW (2017-20)  
One of the top companies for sustainability two years in a row (ranked #13 out of 100)  
BARRON'S

**#128**  
IN 2020  
Fortune 500 company since 2008  
FORTUNE

**6**  
OF THE PAST 8 YEARS  
Global Real Estate Advisor of the Year  
EUROMONEY

**7**  
YEARS IN A ROW  
Named one of the World's Most Ethical Company  
ETHISPHERE

**#1**  
MOST ADMIRERED REAL ESTATE COMPANY (2020)  
Eight consecutive years on the list  
FORTUNE WORLD'S MOST ADMIRERED COMPANIES

**#15**  
OUT OF 500 COMPANIES  
on 2016 "Americas Best Employers" list  
FORBES

**6**  
YEARS IN A ROW  
Included in DJSI North America  
DOW JONES SUSTAINABILITY INDICES

*"I sincerely appreciate CBRE's dedication to our account, the consistent professionalism with each assignment, and willingness to persevere with difficult projects. And yes, we seem to have a plethora of difficult real estate projects. Thank you for your superb work!"*

- DIRECTOR, SPECIAL PURPOSE REAL ESTATE, THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS



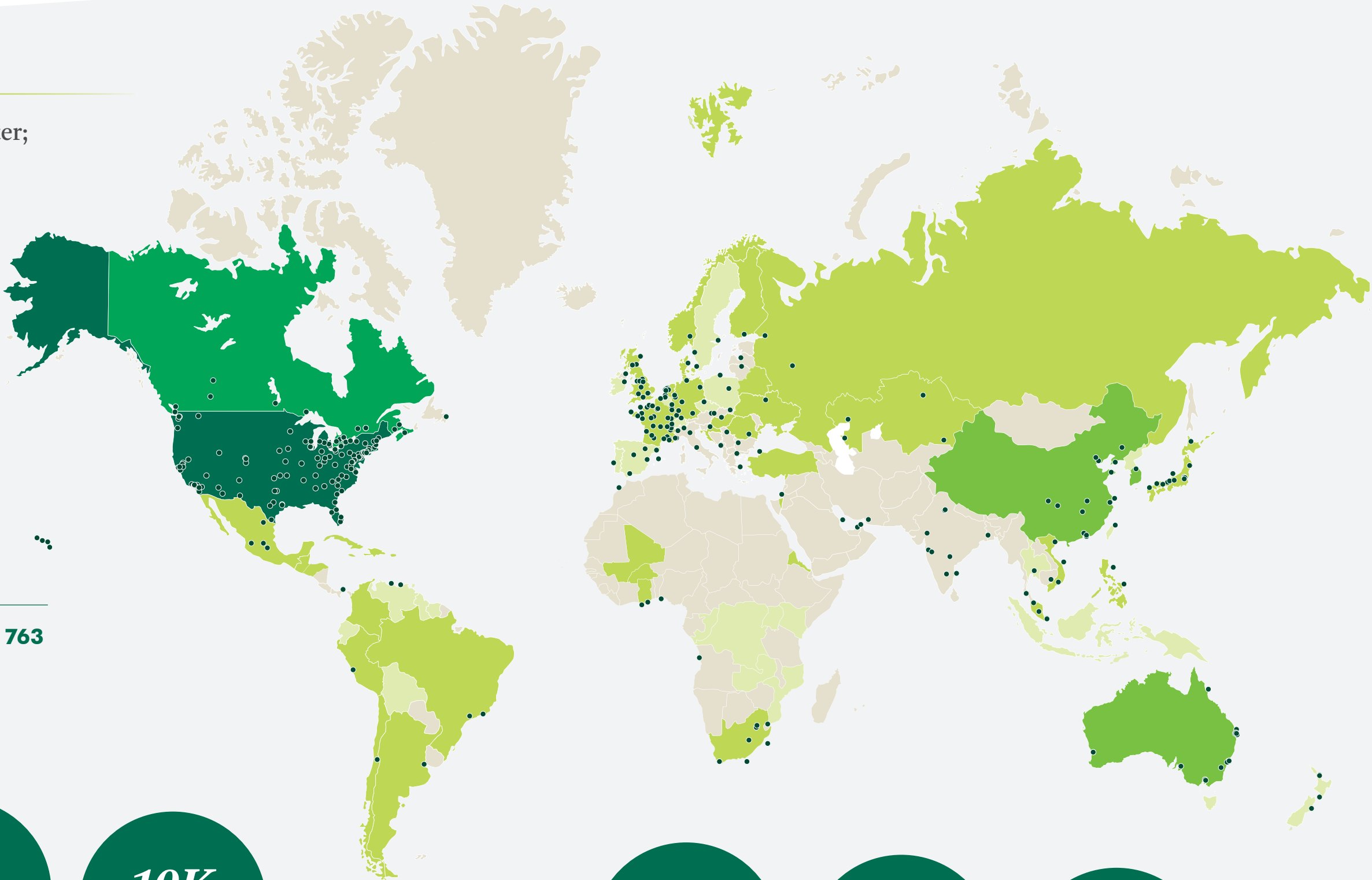
# OUR **COVERAGE**

2/3 of the globe is covered by water;  
the other 1/3 is covered by CBRE

## BY THE NUMBERS: 2013-19

- 1-10 TRANSACTIONS
- 11-30 TRANSACTIONS
- 31-40 TRANSACTIONS
- 41+ TRANSACTIONS
- OTHER ADVISORY ASSIGNMENTS

TOTAL CLOSED TRANSACTIONS: 763



**\$1B**  
TRANSACTIONAL  
VALUE

**5M**  
SF OF OFFICE, RETAIL,  
INDUSTRIAL & SPECIAL  
PURPOSE TRANSACTED

**10K**  
ACRES OF LAND  
TRANSACTED

**763**  
COMPLETED  
TRANSACTIONS

**75**  
COUNTRIES  
REPRESENTED

**22%**  
OF TRANSACTIONS  
CLASSIFIED AS SMALL  
(<THAN USD \$100K)

• CBRE OFFICES INCLUDING AFFILIATES

# SELECT ORGANIZATIONS WE PROUDLY REPRESENT



## Highlights

- 115 locations
- 2.2M SF

## Services Offered

- Global transaction management
- Lease administration
- Complex and Emerging Market Strategies

## Sample Transactions

- 256,000 SF Global HQ consolidation lease, Salt Lake City, UT
- 16,000 SF sale-lease-back, Lima, Peru



## Highlights

- 29 locations
- Massive annual headcount growth

## Services Offered

- Global transaction management
- Project management

## Sample Transactions

- 60,000 SF regional HQ, office lease Copenhagen, Denmark
- 37,000 SF, office lease, Brighton, UK



## Highlights

- 240 locations
- 4.2M SF

## Services Offered

- Global transaction management
- Valuation and Advisory
- Project Management
- Real Estate Organization Advisory

## Sample Transactions

- 380,000 SF, office leasing, two adjoining office towers Seoul, South Korea
- 6,000 SF, office lease Frankfurt, Germany



## Highlights

- Number of completed transactions globally since 2011: 750+
- Number of CBRE employees on account: 10
- Headquartered: Salt Lake City, UT

## Sample Transactions

- 6,800 acres, ranch, Idaho
- 5 acres, development site, Boston, MA

## Services Offered

- Global Transaction Management
- Easement and Right of Way Negotiations
- Land Use and Entitlement Advisory
- Project Management
- Valuation Advisory
- Demographics and Mapping Services
- Complex and Emerging Market Strategies





*“You will not find a better  
global brokerage team.  
They’ve been invaluable  
in supporting our global  
growth, and doing so with  
integrity and our best  
interests always at heart.”*

– HEAD OF GLOBAL REAL  
ESTATE & WORKPLACE,  
UNITY





**DAVID BAUMAN**, *Director*  
+1 801 869 8059 / david.bauman@cbre.com

**ERIK SIMPER**, *Senior Transaction Manager*  
+1 801 869 8016 / erik.simper@cbre.com

© 2020 CBRE, Inc. This information has been obtained from sources believed reliable. We have not verified it and make no guarantee, warranty or representation about it. Any projections, opinions, assumptions or estimates used are for example only and do not represent the current or future performance of the property. You and your advisors should conduct a careful, independent investigation of the property to determine to your satisfaction the suitability of the property for your needs. CBRE and the CBRE logo are service marks of CBRE, Inc. and/or its affiliated or related companies in the United States and other countries. All other marks displayed on this document are the property of their respective owners. Photos herein are the property of the respective owners and use of these images without the express written consent of the owner is prohibited.

