

# RETIREMENT ADVISORS OF AMERICA

## SUCCESS STORY

Two Addison Circle, 15725 N. Dallas Parkway, Addison, TX



### Real Estate Type

Office

### Assignment Size

13,507 SF

### Service Offerings

Tenant Representation; Lease Negotiations; Relocation & Expansion Architectural & Construction Oversight

### Client Feedback

“We interviewed several firms. Our selection of Citadel was based upon one of trust. They proved they could listen, and truly understand our needs. We knew that they would have our best interest in mind while independently capturing every possible opportunity for us to consider as a potential location. They were very attentive to our needs, and there for us at every twist and turn of the process. The result is a relocation to a site that better represents our culture and suits our needs for the future. The Citadel team is fun, flexible and easy to work with- a true partnership”

Bart Roberson  
President & CEO  
Retirement Advisors  
Of America

### Overview

Retirement Advisors of America (RAA) had just over a year and a half remaining on their current office lease. They desired to lower their lease rate, improve efficiencies and enhance their image to create a facility that was more relevant and conducive to their high-net-worth clientele. Timing was delicate due to a sublease occupant within the premises, a recent ownership change on the property, the ability to seize market opportunities and pending lease expiration.

### Strategy

- ✓ Identify high-caliber alternative opportunities in the marketplace that enhance corporate image
- ✓ Improve employee productivity
- ✓ Create a competitive financial environment to accurately analyze a “stay-put” scenario versus a potential relocation
- ✓ Develop a design, construction, FF&E process and team to achieve the client’s ultimate goals

### Results

- ✓ RAA relocated their team to new corporate headquarters
- ✓ Image was enhanced via external signage and interior design
- ✓ Employee efficiency was improved via interior design
- ✓ Expansion, renewal and termination options were implemented to create agility
- ✓ Bottom line savings of 16.7% was achieved in occupancy costs in the new property, and over a 21% savings when comparing to the closest market alternative



**Retirement Advisors**  
of America  
A PHH Investments Company