

Occupier Services



**CITADEL
PARTNERS**

Real Estate Advisors



Unexpected value across your entire experience

It's all just space until it becomes
the beating heart of your business.

Citadel Partners looks at real estate through the lens of the client.

We're calibrated to deliver value beyond the deal – aligning your company's strategic goals with its real estate needs to find the better fit – the one that gives you the highest value of real estate impact on business performance.

Where your company's wants, needs and ambitions intersect with your real estate decisions is where you'll find us. We guide you through the complexity of commercial real estate and deliver smart, innovative solutions with unexpected advantages and measurable outcomes. Getting you more than just a good deal takes more work... for us. It's how you'll get the better fit.



Integrated Business Value

See more than just your options.
See what those options make possible.

Integrated Business Value (IBV) is the impact that a comprehensive real estate strategy has on your company's business performance.

IBV-based solutions are not only aligned with your business strategy, but show you benefits specific to your company's most critical performance drivers.

When you raise the bar beyond just price and terms, we know how to meet the challenge to find you the better fit.

Primary Drivers for Business Performance



Office Representation

Involve us up-front and get more than just a good deal on square footage.

For Office Representation, alignment with client business strategy is at the center of all our strategic planning and consulting services.

We consider the full array of performance drivers, looking not only at P&L alignment, but across several key areas where real estate planning can benefit multiple company stakeholders.

DAAD, our comprehensive, proprietary methodology, enhances collaboration as we guide you through the complexity of commercial real estate. Across the project, we use DAAD to identify the highest possible value impact that your real estate decisions can have on your business performance.

OFFICE REPRESENTATION

Our Occupier Services in Office include leasing, sales and build-to-suits within several key industry sectors.



ENERGY



FINANCIAL SERVICES



REAL ESTATE INVESTMENT



PUBLIC SECTOR



TECHNOLOGY



BUILD-TO-SUIT

DAAD Methodology

Aligning smart solutions with new opportunities.

DAAD is our core methodology that identifies your specific business real estate needs which allows us to deliver a comprehensive real estate strategy and action plan that meets your business objectives.

Throughout this process, we create alignment that leverages your real estate investment and optimizes improvements across your entire value chain. We call it Integrated Business Value.

Citadel Partners will show you more than just options. We will show you opportunities.

D

Discovery

Examine, Evaluate,
Establish Criteria

A

Assessment

Facility Analysis/
Strategic Planning

A

Alignment

Property Research,
Options & Tours

Architectural/
Space Planning
& Programming

D

Delivery

Financial Analysis &
Contract Execution

Construction Estimating
& Management

Project Management



Industrial Representation

See more than just available space. Find the better fit for your brand of industrial activity.

With Occupier Services for Industrial clients, we understand that the number of moving parts and range of functions requires a custom set of real estate capabilities.

We align our services to the challenges and opportunities specific to the full array of your industrial activities. In representing industrial tenants, we focus on their companies' strategies and performance goals. We integrate space and location with IBV drivers that include operations, brand, culture, finance, and other areas of performance impact.

Applying our DAAD process helps us focus the right people on the right spaces for the right reasons.

INDUSTRIAL REPRESENTATION

Our Occupier Services in Industrial include all aspects of leasing, acquisition or disposition in several key sectors.



**MANUFACTURING
HEAVY AND LIGHT
ASSEMBLY**



**STORAGE AND
DISTRIBUTION**



**REAL ESTATE
INVESTMENT**



**LAND ACQUISITION/
DISPOSITION**



FLEX SPACE



LOGISTICS

Occupier Services

Tenant knowledge transformed into market insight with services shaped to your size, not ours.



STRATEGIC PLANNING

- Culture and employee engagement impact
- Brand integration and implementation
- Business and real estate strategy alignment
- Logistics assessment
- Workplace solutions
- Portfolio administration
- Real estate process design implementation
- Evaluate client and employee base
- Examine cost and budgetary objectives
- Brand criteria, compliance and integration
- Performance accountability and reporting
- Establish Timeline

FINANCIAL MANAGEMENT

- Financial modeling
- Debt and equity sourcing
- Appraisal and valuation
- Lease vs. purchase analysis
- Sustainability break-even analysis
- Build-to-Suit and Design-Build proforma financial modeling
- New development financial modeling
- Securing municipal incentives

TRANSACTION MANAGEMENT

- New lease, renewal, and expansion
- Subleasing
- Adaptive re-use
- Market research, feasibility analysis, trend analysis and forecasts
- Architectural design and space planning
- Purchase and sale
- Build-to-Suit and Design-Build
- Site selection

PROJECT CONSTRUCTION & MANAGEMENT

- Pre-construction services
- Project management
- Due diligence asset evaluations
- Ground-up construction management
- Interior finish construction management
- Preliminary costing and budget development
- Assistance in project design and value engineering alternatives
- FF & E coordination
- Project vendor selection and coordination
- Move management
- Bidding, selection and oversight of construction firms
- Oversee construction document preparation
- Post construction close out, punch list completion and documentation

LEASE ADMINISTRATION

- Comprehensive lease administration
- Lease auditing
- Lease abstraction
- Lease management software consulting and implementation
- Lease language consulting
- Operating expense auditing
- Global portfolio services

Our Story

Being the better fit didn't happen overnight.

We've been shaping our services around a dynamic client base for three decades. Since our beginning, the Citadel Partners service ethic has reflected the value of the right solution, not the quick deal – with our clients at the center of our universe.

As a real estate advisory, our services meet the needs of our clients, not the other way around. We configure the right people to the right tasks in both our Office and Industrial service groups, so you pay for what your assignment requires, not for resources you'll never use.

- **1987**
Scott Morse founded the Morse Company.
- **1995**
Scott Jessen joined the company, and together, the Scotts began their career-long commitment of taking CRE service and broker value beyond the transaction level and transforming market knowledge into market expertise.
- **2005**
The Morse Company was acquired by Colliers where Morse and Jessen built and led top performing teams. Across North Texas, Morse and Jessen see a growing shift in client needs – strategic alignment of real estate with business performance.
- **2012**
Morse and Jessen launched Citadel Partners, moving beyond the old-school broker model to expand advisor consultative skill sets and services. Citadel develops a proprietary methodology to help clients discover the enhanced value and increased business performance benefits from real estate decisions.
- **2014**
Citadel invested in expanding strategic skill sets, including devising a methodology to identify and increase the value benefits from integrated real estate strategies.
- **Today**
Citadel Partners is an established real estate advisory firm providing strategy based CRE solutions, market insight and expertise, and uncompromised service from its Office and Industrial teams located in Dallas and Fort Worth.



"We use Scott and his team because not only do we trust him completely, but we appreciate their incredible work ethic and attention to detail. Scott has worked with upper management to develop a strategic plan for our firm's growth and helps us drive consistency in all markets."

JOHN MACKEL
Managing Partner & CEO, Weaver



210,000 SF
OFFICE TENANT REPRESENTATION
MULTI-MARKET ASSIGNMENT



"Citadel Partners was instrumental in providing real estate strategy and overall contract negotiation expertise to our company during our recent summer 2018 office relocation/lease renegotiation effort."

HAL HICKEY
CEO & President



47,860 SF
OFFICE TENANT REPRESENTATION

Collaborative Affiliations

Through our collaborative affiliations, Citadel Partners serves clients across the Dallas-Fort Worth metroplex, throughout Texas and around the country.



- Society of Industrial and Office Realtors**
- 3,100+ Professionals
 - 34 Countries
 - 630+ Markets
 - \$2.1 Billion+ Annual Transactions



- Certified Commercial Investment Member**
- 13,000+ Professionals
 - 1,000+ Markets
 - \$200 Billion+ Transactions



14,910 SF
OFFICE TENANT
REPRESENTATION



"Citadel Partners has assisted us with multiple moves and most recently with an expansion that involved simultaneous negotiations with three parties, including a Fortune 100 tenant across the table. CP earned the respect of the two other parties and their representatives and delivered a solution that was satisfactory to all parties."

JOHN BENTLEY
CEO



"Citadel Partner's market knowledge, along with their understanding of our long-term objectives, helped us get a reduced lease rate and gain allowances to replace HVAC systems and make cosmetic changes. Citadel's perseverance and excellent negotiation skills prevailed with an owner who had never reduced lease renewal rates."

RUSTY CONE
General Manager



82,880 SF
INDUSTRIAL TENANT
REPRESENTATION



165,000 SF
PROPERTY
ACQUISITION



"The NTTA is a governmental entity going through incredible growth and the Citadel team helped bring order to the chaos. Their market knowledge, procurement processes and understanding of private and public entity issues, makes them excellent stewards of NTTA resources to maximize revenue and control costs."

RICK HERRINGTON
Deputy Executive Director



"The Citadel team became an integral part of our office space selection team. They engaged in learning our culture and our business. The end result reflected the culture of our organization — we have a finished location that our team enjoys working in and that showcases our business."

GEORGE PLATT
President



70,000 SF
INDUSTRIAL TENANT
REPRESENTATION



120,000 SF
BUILD-TO-SUIT
REPRESENTATION



"Our company has been doing business with the Citadel team for many years. Citadel Partners assisted our company in locating new office space. They helped us with every aspect of the search from finding the property, through build out and occupancy of our building."

GREGG ALLEN
President, Eland Energy, Inc.



"I highly recommend partnering with the Citadel team for anyone looking for quality real estate representation that is focused on their strategic business drivers and corporate culture."

MARC POWELL
President



176,587 SF
TENANT REPRESENTATION
MULTI-MARKET ASSIGNMENT



1,200,000 SF
CORPORATE HEADQUARTERS
MULTI-MARKET ASSIGNMENT

 **TEXAS
INSTRUMENTS**

"The experience and knowledge of the Citadel team was invaluable in making this transaction happen. The breadth of their relationships were key in bringing this to a successful and timely close."

BRYAN BOOKER

*Word Wide Facilities Real Estate
Texas Instruments*



**MULTIPLE ASSIGNMENTS &
ADVISORY SERVICES**



"Citadel Partners is always professional, courteous and willing to go the extra mile to help us understand how the commercial real estate market works and provide staff with the most up-to-date and valuable information. Thanks to CP our community can always trust their tax dollars are not being spent frivolously."

SANDRA HAYES

Assistant Superintendent, Operations



45,000 SF
OFFICE SUBLEASE
REPRESENTATION

i n v e n s y s

"Citadel Partners succeeded on its mission of subleasing both spaces for us and was a great partner. This rightsizing and relocation to a more efficient space lowered our costs dramatically, which was our primary objective."

BRENT BROWN

Global Real Estate Director





CITADEL PARTNERS

Real Estate Advisors

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