



# Success Story Allworth Financial

Two Addison Circle  
15725 Dallas Pkwy Suite 220  
Addison, TX 75001

## ASSIGNMENT SIZE

21,000 Rentable Square Feet

## OCCUPIER SERVICES PROVIDED

- Strategic Growth Planning
- Workplace Strategy
- Financial Benchmarking and Management
- Transaction Management
- Project Construction Management

## CLIENT TESTIMONIAL:

"We have utilized Citadel Partners since 2012 with our predecessor firm, assisting us with our real estate needs.

Their team is great to work with, from their strategic planning approach, to their extensive market knowledge, and their understanding of current and future trends. Their technical expertise of the real estate process is first class.

We appreciate their work ethic, integrity and always keeping our best interests at the center of all they do. We couldn't be more pleased with the outcome."

Josh Spiegel, CPA  
VP of Analytics & Insights

## The Challenge

When the pandemic hit in 2020, workers were scattered and working from home. Though remote and hybrid work continues to be an increasingly popular option for workers, Allworth Financial saw a true need to return to the office. The company's goal was to have a flagship location in Dallas/Fort Worth that would engage and be an experiential facility for its clients. Leadership also wanted amenities that could retain and attract new employees. Furthermore, Allworth had an existing lease in place that needed to be dealt with before any new initiatives could be implemented.

## Our Strategic Approach

- Exploring the marketplace to underwrite creative alternatives for consideration
- Assessing workplace processes to determine the most effective utilization for our client
- Evaluating our client's facility needs to address innovative ways to incorporate the office facility into its day-to-day operations
- Working with our client to incorporate its new branding initiatives into the facility
- Improving building signage to enhance the branding and cultural initiatives

## The Outcome

The outcome was a long-term lease and expansion to 21,000 square feet. Achievements include top-of-building signage, monument signage at the building's entrance to enhance the arrival experience for clients and guests, state-of-the-art collaborative gathering areas, and internal meeting venues to create a heightened client and employee experience. The expansion of this location aligns with Allworth's business strategy of making the Dallas/Fort Worth location a flagship office and distinctive location for its national business.

From the time we started the assignment to the time we completed the assignment, we achieved qualitative metrics that align with our client's strategic plan, and a quantitative value enhancement of 32% to our client's bottom line.