THE CCIM INSTITUTE
Greater Los Angeles Chapter

IN PARTNERSHIP WITH

CRE®
THE COUNSELORS OF REAL ESTATE®
Southern California Chapter

Serving Fiduciaries & Ultra-High-Net-Worth Real Estate Families

How CCIM Designees Add Strategic Value Beyond the Transaction

CCIM Chapter Lunch & Learn Roadshow

A Preview of the October 23 Online
"Working With Fiduciaries Course"

Event Schedule

September 3, 2026
Thursday, 11:00 AM - 12:00 PM

Arcadia Association of Realtors®
601 S 1st Ave, Arcadia, CA 91006

Scan the QR Code to Register for the Event FREE!

Instructors



PETER G. LAWSON,
CCIM



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Why This Matters

Ultra-High-Net-Worth (UHNW) real estate families and fiduciary-managed portfolios represent some of the most sophisticated and enduring owners of commercial real estate.

These clients don't simply need brokers, they need strategic advisors who can:

- Defend investment decisions under a "higher standard of care"
- Navigate governance structures and approval committees
- Analyze hold vs. sell vs. exchange vs. development scenarios
- Align real estate strategy with generational wealth transfer objectives

This session explores how the CCIM analytical framework uniquely positions you to serve this market.

What You'll Learn

In this 60 minute session, we will discuss:

- The unique dynamics of UHNW real estate families and fiduciary-managed portfolios
- How governance structures influence liquidity, leverage, and risk tolerance
- How IRR, NPV, leverage analysis, and feasibility tools support fiduciary decision defense
- When to finance, how much to finance, and how to evaluate hold vs. sell vs. exchange
- How to position yourself as a long-term steward of generational real estate wealth

This program demonstrates how the CCIM tools apply directly to fiduciary and UHNW real estate decision-making.