THE CCIM INSTITUTE
Greater Los Angeles Chapter

www.ccimla.com

UHNW

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 Schedules

September 2, 2026
Tuesday, 12:00 PM - 1:00 PM

Greater Los Angeles Realtors®
6017 Bristol Parkway, Culver City, CA 90230

Register Here

September 3, 2026
Wednesday, 12:00 PM - 1:00 PM

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

Register Here

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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.

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MEET THE INSTRUCTORS

Peter G. Lawson, CCIM

Peter G. Lawson, a retired real estate asset and property management professional, garnered his skills and experience over nearly 40 years working for two major U.S. banks and a Beverly Hills-based real estate investment company. During his professional career, he earned the designations of CPM, CCIM, and CIPS to enhance his skills and capabilities to better serve the numerous private trusts, high net worth families, and charitable foundation clients in the dynamics of managing investment real estate holdings as an integral part of their diversified long-term asset strategies.

His dedication to advancing real estate professionals included serving on the board of the Los Angeles Chapter of IREM, concluding as Chapter President in 1999; serving on the Los Angeles CCIM Chapter Board; and membership in the National Trust Real Estate Association.

Since retirement in 2016, Mr. Lawson has continued to serve in various positions as a board member of a national nonprofit, a private charitable foundation, and other family-based 501(c) (3)s.

His dedication to supporting our real estate community is now extended to providing real estate professionals with insight into the unique and rewarding business potential of fiduciary-based investors as clients.

Jeffrey A. Gould, CCIM, CPM, LEED AP

Jeff Gould is the Principal and Founder of Lineage Asset Advisors, a Los Angeles–based consulting, asset management, and transaction advisory firm serving multi-generational families, family offices, and family-owned businesses. With more than 21 years of experience, Jeff specializes in advising ultra-high-net-worth families on complex real estate portfolios, helping them navigate both property-level decisions and the nuanced dynamics of shared ownership, governance, and generational transitions. He is a past President (2025) of the CCIM Greater Los Angeles Chapter and currently serves as Co-Chair of the CCIM GLA Fiduciary Committee.

Jeff is also Co-Instructor for the CCIM Ward Course focused on working with fiduciaries and ultra-high-net-worth families that own real estate, where he shares practical insights drawn from decades of advising some of the country's largest private real estate owners. His expertise spans asset strategy, value-add and redevelopment, sustainability, and long-term portfolio planning. Jeff holds the CCIM, CPM, and LEED AP designations, is a California licensed broker, and earned his undergraduate degree in Real Estate Finance from the USC Marshall School of Business. He lives in Los Angeles County with his wife and two children.