

Your ***goals,*** *our* ***strategy***

An approach uniting **thought** with **action**

Response for Tenant Representation and Agency Leacy Brokerage services

June 23rd, 2020



JLL
overview

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Global reach

At JLL we embrace the human side of business, which makes us better at delivering the business side of business

JLL is a leading professional services firm th t specializes in real estate and investment management. Our vision is to reimagine the world of real estate, creating rewarding opportunities and amazing spaces where people can achieve their ambitions. In doing so, we will build a better tomorrow for our clients, our people and our communities. JLL is a Fortune 500 company with operations in over 80 countries.

JLL global **year-end 2019 stats**

92,000 employees

$16.3 billion annual revenue

$179 billion in Capital Markets transactions

37,500 leasing transactions

Select awards and recognitions

FORTUNE 500 2019

ETHISPHERE WORLD'S MOST ETHICAL COMPANIES 2008-2020

LinkedIn TOP COMPANIES WHERE THE US WANTS TO WORK NOW 2018

HUMAN RIGHTS CAMPAIGN FOUNDATION BEST PLACES TO WORK

AMERICA'S MOST JUST COMPANIES Forbes 2020

IAOP THE BEST OF World's Best Outsourcing Advisors

FORTUNE WORLD'S MOST ADMIRED COMPANIES 2019

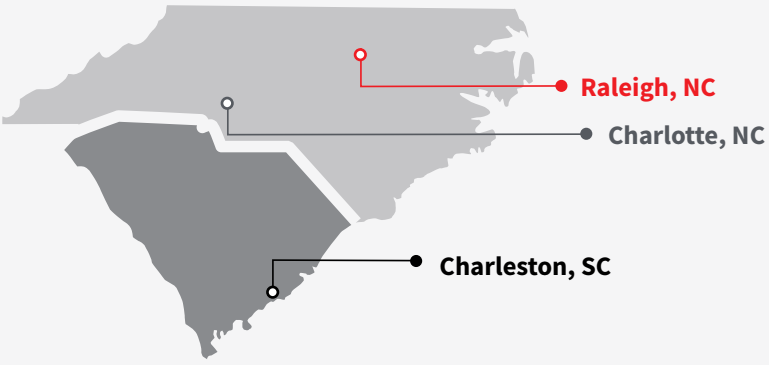
WSJ MANAGEMENT TOP 250 AS RANKED BY DRUCKER INSTITUTE 2018

ENERGY STAR AWARD 2019 PARTNER OF THE YEAR Sustained Excellence

3BL MEDIA Corporate Responsibility Magazine's 100 BEST CORPORATE CITIZENS 2018

MEMBER OF Dow Jones Sustainability Indices In Collaboration with RobecoSAM

JLL Carolinas **year-end 2019 stats**



25M s.f.
of transactions

2.2B
of transaction value

741
transactions

JLL Carolinas

2020 Total Headcount: 192

Brokerage: **45**

Capital Markets: **54**

Project & Development services: **43**

Property Management: **15**

Corporate Solutions: **8**

Brokerage Support: **9**

Operations: **5**

Marketing: **5**

Research: **3**

National Research: **2**

National Retail: **2**

Public Institutions & Higher Ed: **1**

JLL

We are ***one*** *JLL*

When you hire JLL, you get all of JLL. Our extensive, full-service platform and our team's in-depth knowledge of the local real estate market enable us to serve as a single-source provider for the full spectrum of your real estate needs. Our real estate experts in the Raleigh-Durham market specialize in a range of advisory services, no matter how simple or how complex. Our market experts are available to you as needed throughout our engagement.



P3 & Higher Education
Benefi : Specialty focused experts in P3 & Higher Ed that help you finan e your project, mitigate risks, monetize value and boost revenues.

Agency Leasing
Benefi : Creative strategists that will attract and retain the best tenants by activating your assets and maximizing ROI.

Tenant Representation
Benefi : Diverse team with a forward-thinking mindset, using technology to condense project timelines and a people fir t approach to improve workforce culture, productivity and engagement.

Project Management
Benefi : Design and deliver projects that breathe life into old space, create something brand new to help your people thrive while ensuring key budget and timeline goals are met.

Capital Markets
Benefi : Financial wizards that partner with our agency leasing team to bring a holistic approach to maximizing the value of your asset.

Research
Benefi : Fast and reliable analytics that help you make smarter data-driven decisions.

Workplace Transformation
Benefi : Turn your location into a competitive advantage that rivals top universities and employers.

Financial Analytics
Benefi : Make informed and predictive decisions based on personalized financial modeling



JLL **team** and **bios**

Your JLL team

Diverse in age, gender, ethnicity, experience and skillset

Higher Education



David Houck
Executive Oversight

Account Executive, Brokerage



Kimarie Ankenbrand
Managing Director

Governance & Oversight



Herman Bulls
Vice Chairman, Americas



Denise Dexter
Confli ts of Interest Offi er

Teammates

Tenant Representation



Kimarie Ankenbrand
Managing Director



Michael Morgan
Managing Director



Molly Glasgow
Vice President

Agency Leasing



Hillman Duncan
Managing Director



Dennis Hurley
Managing Director



John MacDonell
Vice President



Patti Autry
Vice President



Taylor McCuiston
Associate

Public Institutions & Higher Education



Emily Crutcher
Higher Ed Specialist



Jeremy Becker
Higher Ed Specialist

Project Management (PDS)



Nakira Carter
PDS Lead & Workplace Transformation

Capital Markets



Ryan Clutter
Sr. Managing Director

Marketing & Research



Emily Crandall
Marketing Lead



Ashley Rogers
Sr. Research Analyst

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Tenant Representation team

ACCOUNT EXECUTIVE

Kimarie Ankenbrand, Managing Director/Broker Lead

Kimarie works with corporate users to develop real estate solutions to help solve complex business challenges, enable cultural and organizational change and achieve sustainable financial esults. Kimarie is also responsible for growing the JLL Raleigh-Durham business, acquiring and developing top talent and fostering an innovative and inclusive culture. Her corporate experience and analytical background brings a skill set to the table that is beneficial in helping clien s grow their business and navigate complex real estate transactions that have a direct impact on their workforce. Kimarie recently moved from Dallas, TX, where she was born and raised, which enables her to bring a larger our of market lens.



Years Experience: 15 years

Relevant Experience:

- Xerox – 100K SF relocation and workforce transformation
- Merz – 80K SF expansion and extension
- Samsung – 215K SF relocation (Plano, TX)
- Cardtronics – 80K SF consolidation and relocation (Frisco, TX)
- Conference USA – 10K SF relocation and brand upgrade (Irving, TX)

Michael Morgan, Managing Director

Michael brings creativity, deep experience, market knowledge, negotiating and analytical skills to each engagement, and has a strong history of aligning a strategic real estate plan around a client's corporate business objectives. Experience includes a wide array of product type including offi e, lab, clean room, fle , manufacturing and industrial. A mechanical engineer by training with over 30 years of corporate real estate experience helps provide a powerful combination to create effective solutions for the client.



Years Experience: 30 years

Relevant Experience:

- Local Government Federal Credit Union – 100K SF Office building purchase
- Bayer CropScience – 80K SF lease expansion
- Red Storm Entertainment – 50K Offi e building purchase
- Blue Cross Blue Shield of NC – 18K SF – Lease extension
- Laird Technologies – 18K SF – Relocation

Tenant Representation team

Molly Glasgow, Senior Vice President

Molly specializes in helping technology and life science companies establish and implement effective growth strategies. She brings a holistic, strategic business approach to her clients' real estate process and effectively leverages technology, data and analytics to help her clients make informed business decisions. Molly's creativity combined with her background at corporate and early stage companies give her a unique perspective to help her clients' navigate challenges. A North Carolina native, Triangle resident for over 15 years and NC State Alumni, Molly's business acumen and knowledge of the local market make her an invaluable extension of her clients' team.

Years Experience: 6 years in CRE and 5 years on client-side



Relevant Experience:

- SolarWinds – 80K SF relocation
- SKEMA Business School – 25K SF lease restructure and extension
- Wake Tech Community College – 55K SF lease restructure and extension
- Valassis Digital – 43K SF lease restructure and extension
- NNE Pharmaplan – 22K SF relocation
- PrecisionHawk – 25K SF relocation

Project & Development team

Nakira Carter, PMP, LEED AP, PDS Lead / Workplace Transformation

Nakira is responsible for business development, client relationship management, and project delivery, for the Raleigh market offi e, with a focus on interior offi e build-outs, building renovations, and capital improvements for JLL clients. Nakira also plays a key role in assisting brokerage clients with evaluating workplace strategy concepts for their new or current offi e location, by collaborating and guiding project stakeholders through the design and relocation process to ensure a successful project outcome.



Years Experience: 22 years

Relevant Experience:

- Lenovo – 100,000 SF Consolidation and Relocation
- Microsoft – 40,000 SF Upfit and elocation
- SolarWinds – 80,000SF Upfit and elocation
- Burt's Bees/Clorox – 45,000SF Upfit and elocation

Agency Leasing team

Hillman Duncan, Managing Director / Agency co-lead

Hillman helps building owners develop creative real estate strategies for their assets in addition to overseeing the growth and development of the fir 's Raleigh-Durham agency leasing portfolio.



Years Experience: 26 years

Relevant experience:

- Frontier RTP - 532,783 SF
- Imperial Center – 408,572 SF
- HUB RTP – 1MSF Build to Suit
- Aerial Center - 348,671 SF

Dennis Hurley, Managing Director / Agency co-lead

Dennis strength is strategic planning, developing relationships and executing transactions that are critical to building owners. In addition, he plays an integral part in overseeing the growth and development of the fir 's Raleigh-Durham agency leasing portfolio.



Years Experience: 30 years

Relevant Experience:

- Frontier RTP - 532,783 SF
- Regency Parkway – 388,356 SF
- TriGate Portfolio – 273,554 SF
- HUB RTP – 1MSF Build to Suit

Patti Autry, Vice President

Patti conducts property tours, manages the lease transaction process and assists with property marketing efforts. She has a high-energy approach to agency leasing, as well as an owner's mentality that enables her to understand the best long-term interests of her clients.



Years Experience: 7 years

Relevant Experience:

- Frontier RTP - 532,783 SF
- Imperial Center – 408,572 SF
- Regency Parkway – 388,356 SF
- TriGate Portfolio – 273,554 SF

Agency Leasing *team*

John MacDonell, Vice President

Day to day responsibilities include market and property tours, assisting owners with underwriting new acquisitions, facilitating property marketing efforts, responding to RFP's, assisting with lease negotiations, and business development. John's prior experience as an asset manager affords him a rare perspective and allows him to truly view the asset from the owner's perspective. John has also directly supervised and directed the acquisitions and dispositions for newly formed real estate funds.



Years Experience: 15 years

Relevant experience:

- The Parkline – 215K SF adaptive reuse project
- INQ 1101 – 140K SF adaptive reuse project
- Peak City – 260K SF office/flex/lab new construction

Taylor McCuiston, Associate

Taylor performs market research, property tours and manages the lease transaction process. He brings a go-getter mindset to agency leasing and helps owners implement their real estate strategies to achieve their desired goals.



Years Experience: 5 years

Relevant Experience:

- Frontier RTP - 532,783 SF
- Aerial Center - 348,671 SF
- The Arbors - 214,690 SF
- Spring Forest Business Center- 154,581 SF

Public Institutions & Higher Education team

Emily Crutcher, Vice President

Since 2012, Emily has worked as a Vice President in the Higher Education Practice covering the East Coast markets. Her responsibilities include analyzing the financial and trategic viability of real estate development projects, delivering insightful market reports, providing risk-adjusted real estate investment strategies, conducting comprehensive portfolio analyses, advising on the structure of public-private partnerships, and assisting on transactions to a wide range of public sector clients. From 2007 to 2012, Emily worked in JLL's Dubai offi e servicing clients across the Middle East and Africa.

Years Experience: 13 years

Relevant Experience:

- North Carolina State University (NC State): Development advisory and developer solicitation services for an Innovation District on a 32-acre parcel on Centennial Campus in Raleigh, North Carolina.
- Research Triangle Foundation: Market analysis study and development advisory for the development of a 625,000 s.f. offi e building in Park Center, the new urban hub for Research Triangle Park (RTP), and an optimized use study for a confidential si e within RTP in Durham, North Carolina.



Jeremy Becker, Senior Vice President

Jeremy is a Vice President in JLL's Public Institutions and Higher Education (PI) group. He leads PI's business development and execution efforts in a nine-state area in the Southeast. Working closely with other JLL service groups, he continues to build our government specialty to provide real estate strategy, financing, d velopment and transaction services to public and private sector clients.



Years Experience: 7 years CRE, 10 years in law

Relevant Experience:

- City of Marietta, Georgia: Advise the City on acquisition targets and disposition strategies as part of a decade long holistic redevelopment.
- State of Alabama: Part of the State's offi e leasing team from 2016-2019.
- Hartsfield Jackson Atlanta International Airport: Airport's outsourced real estate advisor for all off ampus Airport owned real estate.



JLL
approach

Advantage of integrated agency and tenant representation platform

Our integrated agency and tenant representation platform enables JLL to provide you with a holistic perspective of the market and top-quality data and analytics.

With stand-alone Tenant Representation and Agency Leasing teams, we carefully maintain fiducially responsibility to our clients while maximizing knowledge through data analytics via our national platform and the knowledge of 5,000 brokers and 250 researchers across the country.

We will:

- Make the real estate process seamless, saving you time, money and mitigating risk.
- Provide you with a white glove customer experience from start to finish
- Represent your interests only, without compromise.

Onboarding process

Providing a well-planned and staffed transition is our fir t step in driving quality control and mitigating business risk and disruption.

Phase 1: Planning & prep

- Kick off meeting.
- Define business objectives and data requirements.
- Understand current processes and organization structure.
- Evaluate financial and timing constraints, and availability of required data and resources.
- Deliverables: transition plan, resource accountabilities and protocols.

Phase 2: Data gathering & Integration

- Develop standards: templates, process maps.
- Document key reporting requirements.
- Review existing databases & file
- **Tenant Representation:** Build customized, project database - tenants, locations, lease ex, priorities, collect & abstract leases.
- **Agency Leasing:** Prepare custom leasing strategy and marketing plan; analyze existing rent roll, portfolio and vacancy walkthroughs and discuss programmatic partnership with client.
- Client involvement is critical to ensure a timely and complete collection of information.
- Obtain copies of contracts for leased and subleased properties as well as any applicable correspondence and abstract the lease and sublease information.
- All missing info will be tracked for escalation to your team.

Phase 3: Review, analysis, & start-up

- Double check leases for accuracy.
- Send communications to landlords regarding any change in process or correspondence addresses.
- Introductions and process integration between client and the JLL team will be made.

Phase 4: Go live - ongoing

- Take over day-to-day management of the account.

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Tenant Representation

scope of services

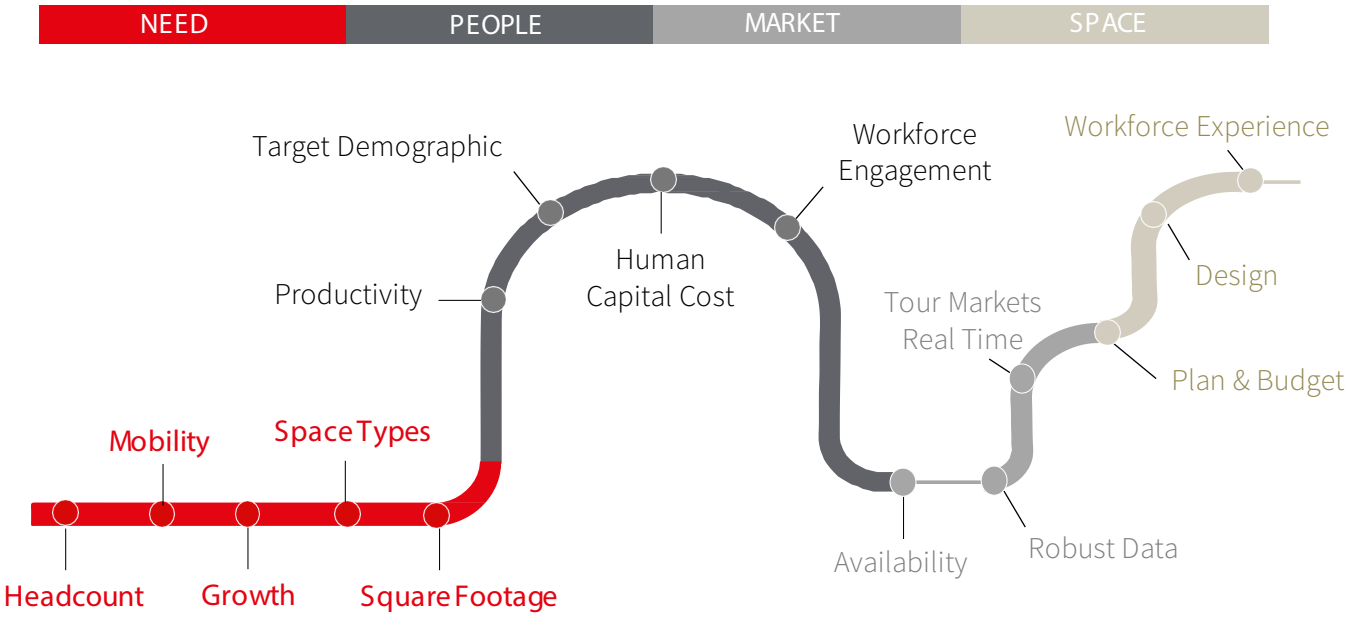
Our focus is on the client's success. We get to know you, your business and your goals. That information—paired with data-driven research, local market expertise and long-standing industry relationships—enable us to develop a strategy specific to each client affiliated tenant's needs.

Our team's unique, technology & data driven approach takes into account four key considerations:

1. **Your Needs**
2. **Your People**
3. **The Market**
4. **Your Space**

Our technology-driven approach aligns stakeholders to your business and real estate needs, quantifying how to best support your people, exploring the market virtually, and designing and budgeting the perfect space.

The RE Roadmap

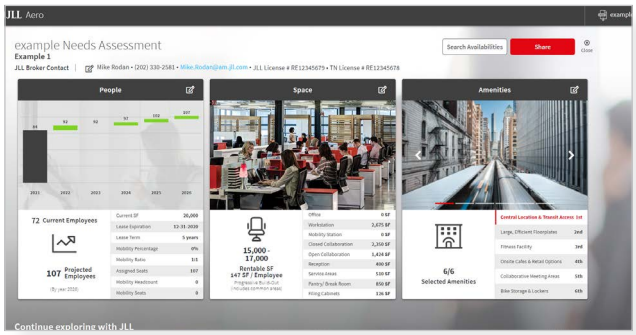


JLL

Our technology-driven approach

Through our technology, we can define, measure and improve key metrics with technologies that reduce time between decisions from months to weeks and save you money while mitigating risk. Our technology-driven approach aligns stakeholders to your business and real estate needs, quantifying how to best support your people, exploring the market virtually, and designing and budgeting the perfect space.

1 Your Needs

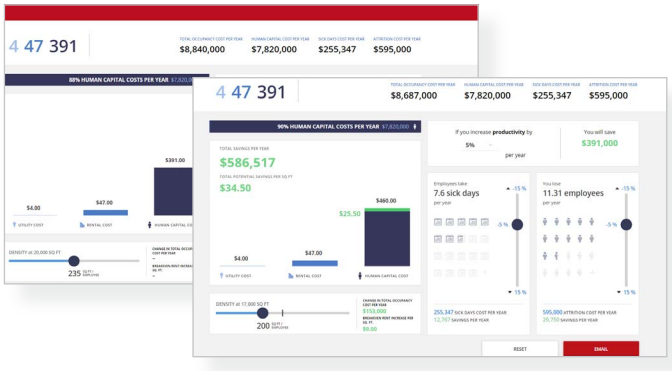


Needs Assessment

Align and inspire

Needs Assessment is an interactive space planning tool that illustrates space and cost impact of various scenarios. The assessment quickly combines your business data with industry-leading analytics to customize the most efficient use of your future workplace. Documenting the business case for real estate helps drive internal stakeholder alignment and makes the process faster.

2 Your People

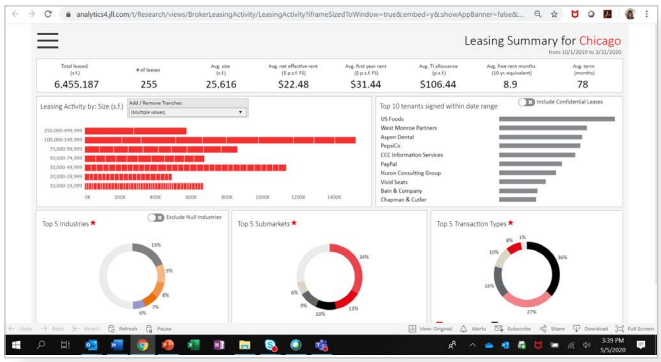


3-30-300

Workplace productivity

Employees are 100x more expensive than utilities and 10x more than rent per square foot. 3-30-300 will challenge traditional methods of workplace value analysis by demonstrating how investments in healthy, sustainable workplaces offer the most profound opportunity for cost savings.

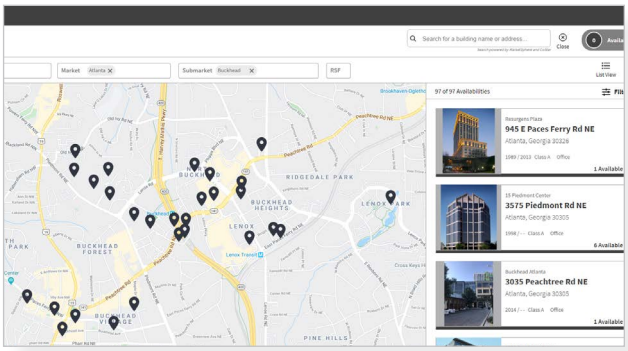
3 The Market



Terminal

Market intelligence

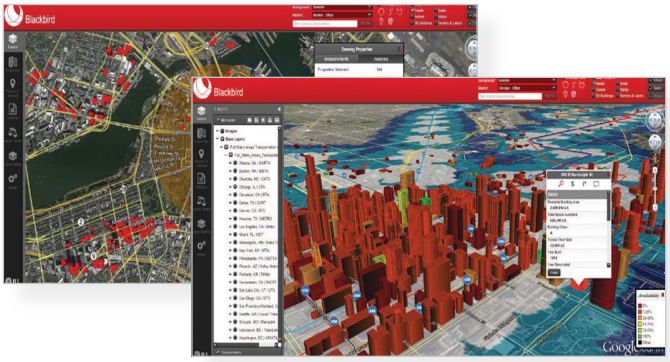
Terminal gives you actionable insights about the overall market using dynamic dashboards and visualizations. Easily monitor market performance, as well as activity in leasing, sales, development and the local economy. Powered by JLL's industry-leading research, understanding what's important is now easier to access and analyze.



Aero Survey

Survey the market

Aero Survey/Tour helps you select JLL research-verified properties and availabilities to create a Market Survey or Tourbook. You can discuss requirements with your prospect, select availabilities, then compare/highlight results within and across markets.

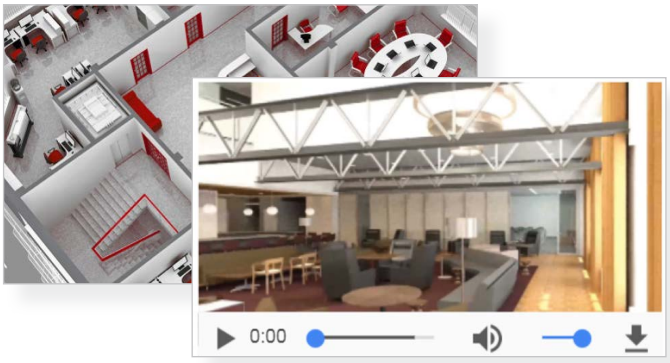


Blackbird

Market visualization

Blackbird combines unique client data with up-to-date real estate market intelligence such as availabilities, stacking plans, or comps, as well as public infrastructure and amenities, and displays them in a visually engaging, 3-dimensional, interactive environment. You can virtually tour options at a market-level down to a specific floor of a building without the cost of travel or time.

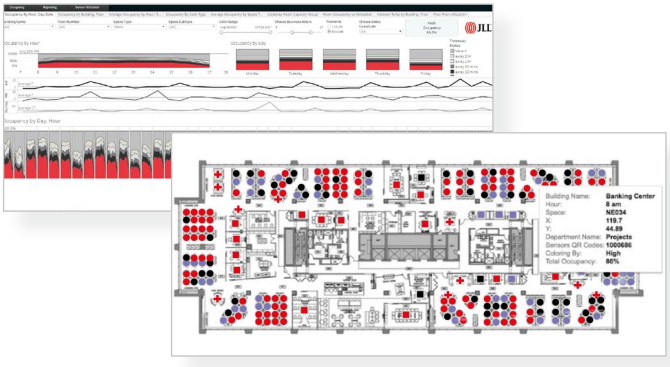
4 Your Space



InSite

Budget and plan

JLL is the global leader in workplace, occupancy planning and project management services with the largest, most experienced team in the industry. We provide accurate, reliable test-fitting and 3D walk-through visualizations supported by industry standard software and build-out budgeting. With InSite, you are empowered to make smarter, more informed real estate decisions about the future of your workplace.



UtilizationIQ

Utilization intelligence

UtilizationIQ is a people and space-tracking technology service that allows JLL to advise better employee engagement and cost reduction. The technology and service collect which spaces are being used (and not used); then draws correlations between elements of time, workstyles, and amenities to guide improved workplace practices.

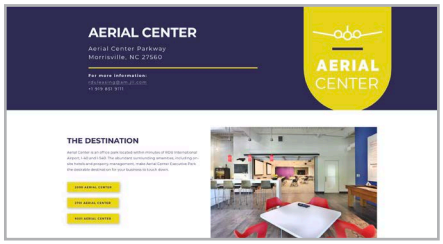
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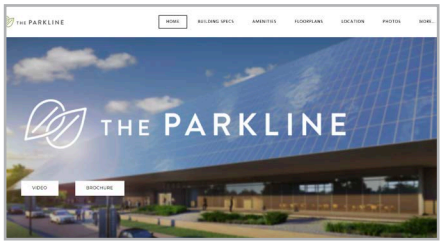
Marketing plan

Tap into sophisticated marketing. We always present your properties in the best light, thanks to our award-winning marketing team. Our teams can produce a full suite of high-impact promotional tools, including virtual reality applications, drone videos, touch-screen tours, expertly designed print pieces, engaging events, videos, custom websites and email property marketing collateral. We think like marketers when approaching each building, generating creative, out-of-the-box strategies and tactics that keep your building top of mind with tenants.

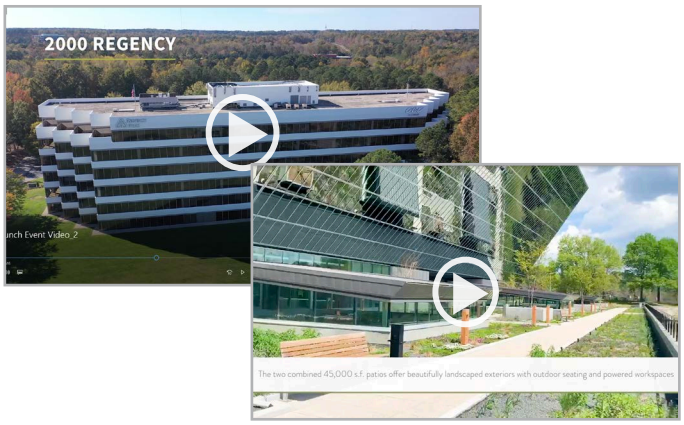
Websites:



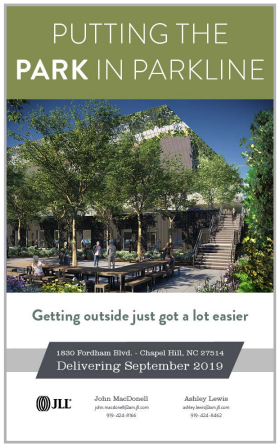


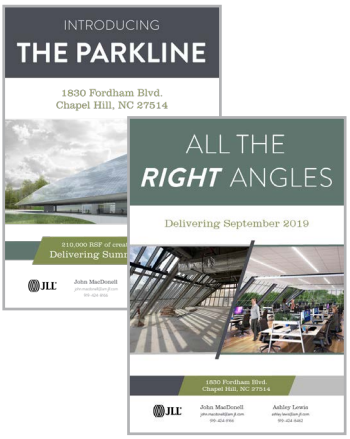


Property videos + virtual tours:



Email campaigns:

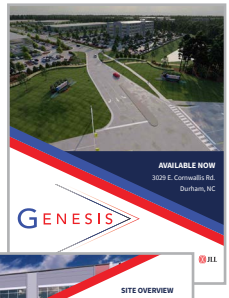




Custom brochures and flyers:







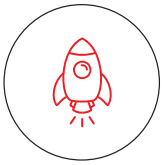


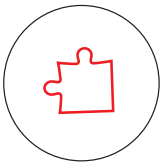
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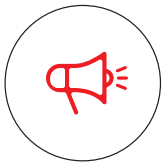
Marketing checklist

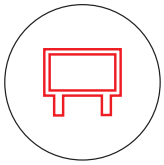
Our detailed marketing checklist is custom designed to meet the needs of the clients portfolio.


Signed listing agreement


Kick-Off meeting

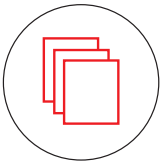

Marketing plan and budget


Brokerage community email announcement

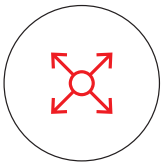

Property signage


Gather property renderings, floorplans etc


Brand identity creation

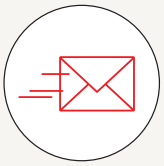

Develop marketing collateral


Online listings


Public relations

Construction / development

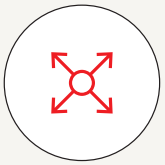

Continue to refine marketing collateral


Email campaign


Responsive sales website


Direct mail marketing


Social media marketing


Public relations

Delivery / operational


Market center

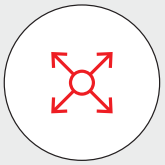

Property video, final photography, drone


360° matterport virtual tours



Broker event, reveal party


Social media marketing


Public relations