



PROPOSAL KIT SAMPLE

Commercial Office Real Estate Lease Proposal

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MEMO

TO: Dan Whitman
FROM: Jess Sloan
RE: Proposed Commercial Lease

Mr. Whitman,

As you are well aware, I've been scouting locations for the possibility of moving Whitman Realty to a more visible location with more offices. As an assistant Broker who has worked with you now for seven years, I've witnessed the growth of the business as well as its potential, and I believe the time has come where we must make a bold move, in this case a literal one, or we face being squeezed out of the market by more visible, highly branded franchises.

I understand that the moving of your offices is a serious undertaking, one that you have been pondering for the last year. I also understand the risks and the expenses involved, and given the potential slowing of the market, your hesitancy to make any major changes. However, I think you will be excited about the new commercial lease I am proposing. Not only will this move allow you to expand the business, the company branding, and the possibility of franchising, but it will also advance the careers of the realtors working for you as well as allow you to hire new recruits, resulting in higher commissions and higher profits.

As per our conversation last week, I took the liberty of optioning the lease for your review. We have until midnight on the 31st to respond. I look forward to talking with you further about making this expansion an actuality.

Sincerely,

Jess Sloan



PROPOSAL

Proposed New Commercial Office Lease

Prepared for: Dan Whitman
CEO

Prepared by: Jess Sloan
Broker





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EXECUTIVE SUMMARY

The Objective...

Expand business capabilities, office space, and profits by a change of location.

- ▶ Need #1: Office for 24 on-site agents, conference rooms, work rooms, and lobby.
- ▶ Need #2: Easily accessible location with parking.
- ▶ Need #3: 5 year lease with options to ensure expansion capabilities.

The Opportunity...

To become a better branded, highly visible realty office in the Bellevue area.

- ▶ Goal #1: To move into new commercial lease space by October 1st.
- ▶ Goal #2: To increase client base by improving visibility and access.
- ▶ Goal #3: To expand the business by 25% by year 3 and by 50% by year 5.

The Solution...

A new commercial lease space is required in order to expand.

- ▶ Recommendation #1: Examine office space at 5260 114th Ave SE, Bellevue.
- ▶ Recommendation #2: Respond to initial lease option by July 31st.
- ▶ Recommendation #3: Complete lease negotiation and signing by August 15th.





OPPORTUNITIES

The opportunities created by a move to the proposed commercial lease space allow Whitman Realty to move in a forward direction and to become highly competitive with the more well-known realty franchises in the area.

▶ Opportunity #1

Increase Visibility

The new location will increase company branding, as thousands of commuters traveling on Southbound I-405 can see the office building and its signs from the freeway.

▶ Opportunity #2

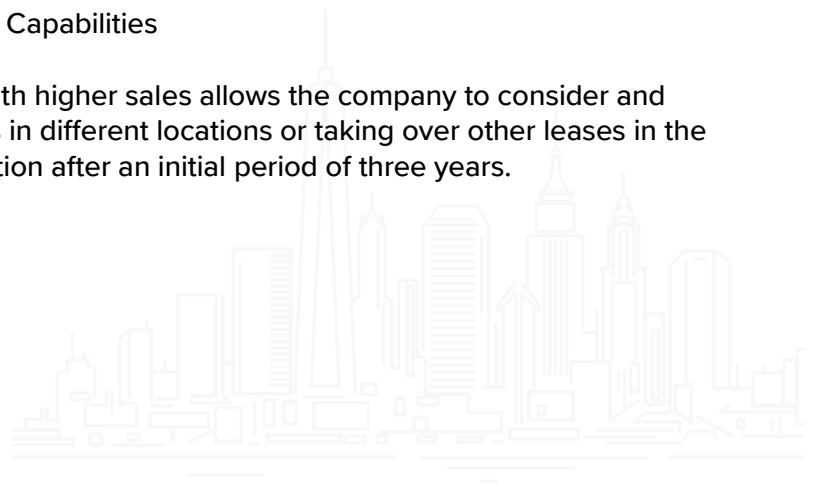
Increase Sales

With more office space, we can hire 12 new agents. This coupled with higher visibility will lead to more sales and therefore, higher profits. Even at a low average of four sales per year per agent for a low to average price home (\$350,000.00), this results in a commission profit of \$504,000.00 per year for Whitman Realty. In addition, we can expect that our existing 12 agents, who have had sold a combined average of 82 homes per year, could easily increase their combined average to 106 homes per year, at a further profit increase of \$252,000.00. The latter profit substantiates the majority of expenses incurred in the moving of offices.

▶ Opportunity #3

Increase Future Expansion Capabilities

Higher visibility coupled with higher sales allows the company to consider and afford opening new offices in different locations or taking over other leases in the same proposed lease location after an initial period of three years.





RETURN ON INVESTMENT

Detailed below is the Return on Investment (ROI) analysis for the project. The costs for the lease, increased advertising, and new office equipment and supplies vs. the benefits are summarized for a 5-year period for average, slow, and growth markets. The difference in the markets assumes profit differentials of \$244,000.00.

Average Market

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Total Costs	\$642,000	\$348,000	\$356,000	\$362,000	\$368,000	\$2,076,000
Benefits	\$756,000	\$756,000	\$756,000	\$756,000	\$756,000	\$3,780,000
Net	\$114,000	\$408,000	\$400,000	\$394,000	\$388,000	\$1,704,000
Ratio	0.18	1.17	1.12	1.09	1.05	0.82
ROI	18%	117%	112%	109%	105%	82%

Slow Market

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Total Costs	\$642,000	\$348,000	\$356,000	\$362,000	\$368,000	\$2,076,000
Benefits	\$512,000	\$512,000	\$512,000	\$512,000	\$512,000	\$2,560,000
Net	(\$130,000)	\$164,000	\$156,000	\$150,000	\$144,000	\$484,000
Ratio	-0.20	0.47	0.44	0.41	0.39	0.23
ROI	-20%	47%	44%	41%	39%	23%



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