

IRR Southwest Florida Office Profile

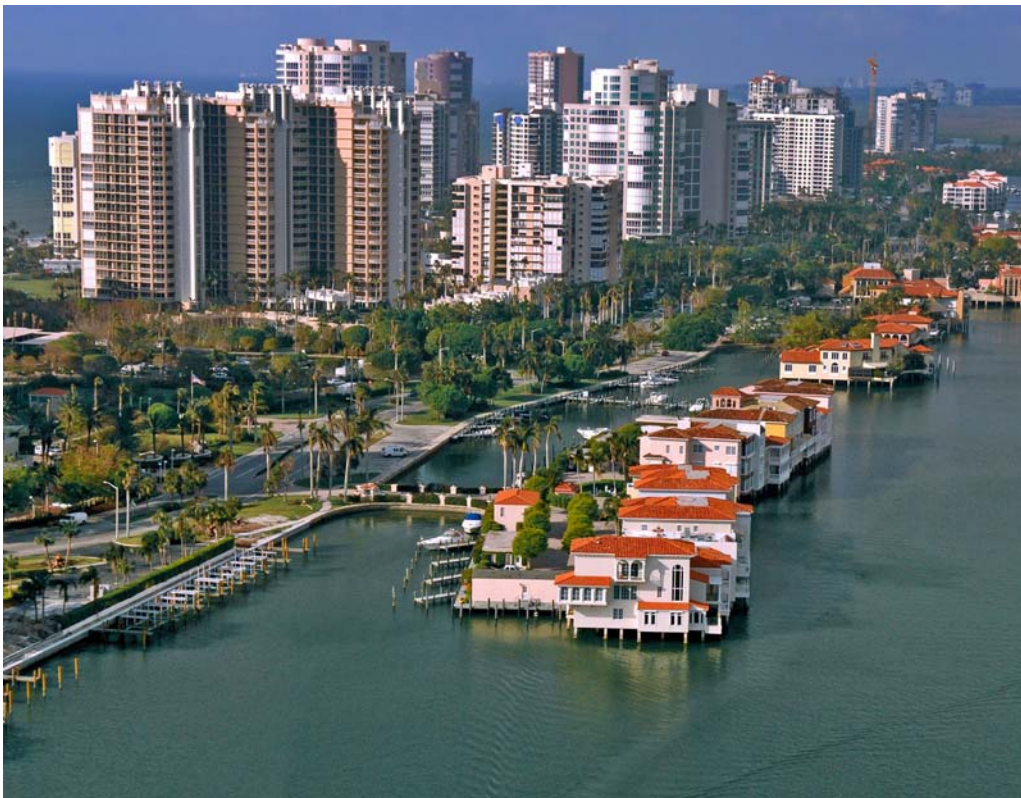
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Integra Realty Resources
Southwest Florida

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Overview of Expertise

Integra Realty Resources – Southwest Florida provides valuation and consulting services for various types of real property with an emphasis on investment grade real estate. We provide consulting, evaluation, valuation, feasibility and market study services for commercial, industrial, apartment and vacant land properties. We serve major national and regional banks, pension fund advisors, DUS and HUD MAP mortgages bankers, investment advisory firms, Fortune 500 companies, private clients, developers, lenders, inventors, governmental agencies, and other professionals concerned with the value and feasibility of real property. Over the past 24 years of serving all parts of Southwest Florida, Including Marco Island, Naples, Fort Myers, Cape Coral, Port Charlotte, Punta Gorda, Sarasota and Bradenton. We have provided advice on most major commercial properties, suburban office and business parks, retail properties including regional malls, lifestyle centers and power centers, golf courses, and marinas; as well as the largest multifamily properties in the region including mixed use multifamily and high rise condominium developments.

Principal Markets Served

Florida Counties

Collier

Lee

Charlotte

Hendry

Sarasota

Manatee

Hardee

Desoto

Glades

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Key Personnel

Senior Management

Carlton J Lloyd, MAI
Senior Managing Director
clloyd@irr.com

Administrative Team

Debbie Stokes
Office Manager
dstokes@irr.com

Senior Analysts and Analysts

Julian LH Stokes II
jlstokes@irr.com

Anthony Sartori
asartori@irr.com

Jocelyn Collins
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Rebecca Ling
rling@irr.com

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Core Competencies

Office
Retail
Multifamily
Industrial
Land
Residential Subdivisions

- Valuation for all facets of real estate lending, asset acquisition, and disposition decision-making, legal proceedings, and public-sector planning and development initiatives
- Market and feasibility studies for major residential and commercial development projects
- Litigation and qualified expert testimony in all litigation and arbitration venues
- Comprehensive research coverage of the major asset classes (office, retail, industrial, & multi-family).
- Expertise in special-purpose property valuation such as golf courses and marinas
- Expertise in real property interests (leasehold and other partial interests)
- Extensive experience in management of large valuation and consulting projects
- Complex cash-flow modeling, asset performance peer studies
- Real estate consulting on complex real estate matters
- Residential valuation inclusive of all facets of residential valuation from condominium to large estates

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Office Assignments

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M&I Bank Building

A Class A office property containing 41,0221 SF, 3 tenants, contracted in 2013, located in Naples, FL. Valuation for the mortgage lender.



Grey Oak Office Complex

A Class B office property containing 101,650 SF in three buildings, 22 tenants, contracted in 2013, located in Naples, FL. Valuation for the mortgage lender.



Riverside Medical Center

A Class B medical office property containing 57,359 SF, 11 tenants, contracted in 2013, located in Bradenton, FL. Valuation for the mortgage lender.



Concourse Tower I

A Class B office property containing 73,260 SF, 16 tenants, three-level parking garage, contracted in 2012, located in Tampa, FL. Valuation for the special servicer.



Retail Assignments

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Pep Boys

A single tenant net leased property containing **22,225 SF**, contracted in **2013**, located in **Fort Myers, FL**. Valuation for the mortgage lender.



Third Street Retail Portfolio

A portfolio of **12** multi tenant retail and vacant land properties located throughout the downtown area, contracted in **2012**, located in **Naples**. Valuation for the property owner.



Bonita Bay Plaza

A grocery anchored neighborhood center containing **53,275 SF**, **14** tenants, contracted in **2012**, located in **Bonita Springs, FL**. Valuation for the mortgage lender.



Esplanade

A waterfront specialty center containing **50,737 SF**, **19** tenants, contracted in **2012**, located in **Marco Island, FL**. Valuation for the mortgage lender.



Areas of Specialization

Residential Subdivision Analyses
Golf Courses/Clubs
Marinas
Student Housing
Gas/Service Stations/C-Stores
Retail Shopping Centers
Office Buildings/Condominiums
Multi-Family/Apartments
Land Commercial/Retail
Industrial Manufacturing/Warehouse
Lodging & Hospitality
Religious Facility/Church
Self Storage
Marinas
School/University
Fitness Center/Sports Club
Car Dealership
Net Leased Properties
Manufactured Housing
Car Wash
Malls/Regional/Local Retail
Tavern/Bar/Micro-Brewery
Truck Stop/Transit Facility
Restaurant: Sit down/limited/fast food
Affordable Housing & LIHTC and HUD Map Lending

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Specialty Properties

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Pelicans Nest Golf Club

A 36 hole golf course and club located in a residential community, contracted in 2013, located in Bonita Springs, FL. Valuation for the mortgage lender.



Golf Club Of the Everglades

An 18 hole stand alone golf course and club community, contracted in 2013, located in Naples, FL. Valuation for the mortgage lender.



Ave Maria Student Housing

A 5 building student housing complex containing 461 rooms and 1,445 beds, contracted in 2013, located in Ave Maria, FL. Valuation for a bond offering.



Del Prado Boat Club

A dry slip marina property containing 23,182SF, 152 racks, contracted in 2013, located in Cape Coral, FL. Valuation for the mortgage lender.



Camden Lakes

A 60 acre proposed residential subdivision containing 150 units, contracted in 2013, located in Naples, FL. Valuation for the mortgage lender.



Grand Palm

An 89 unit single family home subdivision, contracted in 2013, located in Venice FL. Valuation for the mortgage lender.



Client List

Financial Institutions and Lenders

1st United Bank
AmSouth Bank
Astoria Federal Savings and Loan
Banco Popular North America
Bank Midwest
Bank of America
Bank of Florida
BankAtlantic
BB&T
BBVA Compass
Beach Community Bank
Busey Bank
Capital Bank
Capital One Bank
Centerline Capital Group
Central Bank & Trust Co
Charter One (a division of RBS Citizens, NA)
C-III Asset Management LLC
Citibank
City National Bank
Comerica Bank
Community Trust Bank
Encore Bank
First Bank
First Citizens Bank
First Community Bank of Southwest Florida
First National Bank of the Gulf Coast
First Southern Bank
FirstService PGP Valuation
Florida Community Bank
Huntington National Bank
John Hancock Real Estate Financial Group
JPMorgan Chase, NA
Liberty Bank
M & I Bank
M&T Realty Capital Corporation
Red Mortgage Capital
Regions Bank

Investment Banks/Pension Fund Advisors/ REITS

Mutual of Omaha Bank
New York Community Bank
NexTier Bank
Northern Trust
Orange Bank of Florida
Pacific National Bank
Park Sterling Bank
Partners Bank
Peninsula Bank
PNC Real Estate Valuation Services
RBC Centura
Royal Palm Bank
Seacoast National Bank
Shamrock Bank of Florida
Southwest Capital Bank
SunTrust
Synovus Bank
TD Bank
The Private Bank and Trust
Toyota Financial Services
UPS Capital
US Bank
Wells Fargo

Government & Corporations

Collier County Government
FDIC
Sarasota Conservation Foundation
The District School Board of Collier County

Developers & Investors

Barron Collier Company
Gulf Bay Development
Miromar Development Corporation
WCI Development
The Bonita Bay Group

Special Servicer

Berkadia Commercial Mortgage, LLC
Centerline Servicing (C-111 Asset Management)
Helios AMC

Law Firms

Coleman, Yovanovich & Koester, P.A.
Glenn Rasmussen & Fogarty & Hooker P.A.
Haginas Chapman & Shillings
Kelly, Passidomo & Alba, LLP
Porter, Wright, Morris and Arthur
Roetzel & Andrews
Pavese Law Firm
Salvatori & Wood, Attorneys at Law
Bond, Schoeneck & King, PLLC

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Key Personnel Qualifications

Carlton J Lloyd, MAI

Mr. Lloyd has over 15 years of expertise in valuation and counseling of all major types of real estate including commercial, industrial, office, multifamily, mixed-use, and special-purpose properties, with a particular expertise in the valuation of investment grade real property.

Mr. Lloyd has been a real estate consultant since 1995, entering the real estate industry as an analyst for Appraisal Research Corporation of Naples. In 2001 Appraisal Research Corporation became Integra Realty Resources Southwest Florida at which time Mr. Lloyd became a senior analyst and part of the management team. In 2008 he became Managing Director of Integra Realty Resources Sarasota, and assumed the Senior Managing Director role for both the Sarasota and Naples office of Integra Realty Resources in 2010.

Mr. Lloyd has a broad range of experience in valuation and analysis of all types of real estate including commercial, industrial, office, multifamily, mixed-use, and special-purpose properties. He has developed a particular expertise in the valuation of investment grade real property. He has also been engaged by domestic and offshore investment partnerships to conduct marketability, feasibility, and various valuation consultation assignments.

Mr. Lloyd received a Bachelor of Business Administration degree from the State University of New York at Albany in 1985.

Mr. Lloyd received the MAI designation in 2008. He is a Certified General Real Estate Appraiser with the states of Florida.

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Corporate Profile

Integra Realty Resources, Inc. offers the most comprehensive property valuation and counseling coverage in the United States with 63 independently owned and operated offices in 33 states. Integra was created for the purpose of combining the intimate knowledge of well-established local firms with the powerful resources and capabilities of a national company. Integra offers integrated technology, national data and information systems, as well as standardized valuation models and report formats for ease of client review and analysis. Integra's local offices have an average of 25 years of service in the local market, and each is headed by a Managing Director who is an MAI member of the Appraisal Institute.

A listing of IRR's local offices and their Managing Directors follows:

ATLANTA, GA - Sherry L. Watkins., MAI, MRICS
AUSTIN, TX - Randy A. Williams, MAI, SR/WA, FRICS
BALTIMORE, MD - G. Edward Kerr, MAI, MRICS
BOISE, ID - Bradford T. Knipe, MAI, ARA, CCIM, CRE, FRICS
BOSTON, MA - David L. Cary, MAI, MRICS
CHARLOTTE, NC - Fitzhugh L. Stout, MAI, CRE, FRICS
CHICAGO, IL - Eric L. Enloe, MAI, MRICS
CHICAGO, IL - Gary K. DeClark, MAI, CRE, FRICS
CINCINNATI, OH - Gary S. Wright, MAI, SRA, FRICS
CLEVELAND, OH - Douglas P. Sloan, MAI
COLUMBIA, SC - Michael B. Dodds, MAI, CCIM, MRICS
COLUMBUS, OH - Bruce A. Daubner, MAI, FRICS
DALLAS, TX - Mark R. Lamb, MAI, CPA, MRICS
DAYTON, OH - Gary S. Wright, MAI, SRA, FRICS
DENVER, CO - Brad A. Weiman, MAI, MRICS
DETROIT, MI - Anthony Sanna, MAI, CRE, FRICS
FORT WORTH, TX - Donald J. Sherwood, MAI, SR/WA, FRICS
GREENSBORO, NC - Nancy Tritt, MAI, SRA
GREENVILLE, SC - Michael B. Dodds, MAI, CCIM, MRICS
HARTFORD, CT - Mark F. Bates, MAI, CRE, FRICS
HOUSTON, TX - David R. Dominy, MAI, CRE, FRICS
INDIANAPOLIS, IN - Michael C. Lady, MAI, SRA, CCIM, MRICS
JACKSONVILLE, FL - Robert Crenshaw, MAI
KANSAS CITY, MO/KS - Kenneth Jagers, MAI, FRICS
LAS VEGAS, NV - Shelli L. Lowe, MAI, SRA, MRICS
LOS ANGELES, CA - John G. Ellis, MAI, CRE, FRICS
LOS ANGELES, CA - Matthew J. Swanson, MAI
LOUISVILLE, KY - George M. Chapman, MAI, SRA, CRE, FRICS
MEMPHIS, TN - J. Walter Allen, MAI, MRICS
MIAMI/PALM BEACH, FL - Scott M. Powell, MAI
MIAMI/PALM BEACH, FL - Anthony M. Graziano, MAI, CRE

MINNEAPOLIS, MN - Michael Amundson, MAI, CCIM, MRICS
NAPLES, FL - Carlton J. Lloyd, MAI
NASHVILLE, TN - R. Paul Perutelli, MAI, SRA, MRICS
NEW JERSEY COASTAL - Anthony Graziano, MAI, CRE, FRICS
NEW JERSEY NORTHERN - Barry J. Krauser, MAI, CRE, FRICS
NEW YORK, NY - Raymond T. Cirz, MAI, CRE, FRICS
ORANGE COUNTY, CA - Larry D. Webb, MAI, FRICS
ORLANDO, FL - Charles J. Lentz, MAI, MRICS
PHILADELPHIA, PA - Joseph Pasquarella, MAI, CRE, FRICS
PHOENIX, AZ - Walter Winius, Jr., MAI, CRE, FRICS
PITTSBURGH, PA - Paul D. Griffith, MAI, MRICS
PORTLAND, OR - Brian A. Glanville, MAI, CRE, FRICS
PROVIDENCE, RI - Gerard H. McDonough, MAI
RALEIGH, NC - Chris R. Morris, MAI, MRICS
RICHMOND, VA - Kenneth L. Brown, MAI, CCIM, MRICS
SACRAMENTO, CA - Scott Beebe, MAI, FRICS
ST. LOUIS, MO - P. Ryan McDonald, MAI
SALT LAKE CITY, UT - Darrin Liddell, MAI, CCIM, MRICS
SAN ANTONIO, TX - Martyn C. Glen, MAI, CRE, FRICS
SAN DIEGO, CA - Jeff Greenwald, MAI, SRA, FRICS
SAN FRANCISCO, CA - Jan Kleczewski, MAI, FRICS
SARASOTA, FL - Craig L. Smith, MAI, MRICS
SAVANNAH, GA - J. Carl Schultz, Jr., MAI, SRA, CRE, FRICS
SEATTLE, WA - Allen N. Safer, MAI, MRICS
SYRACUSE, NY - William J. Kimball, MAI, FRICS
TAMPA, FL - Bradford L. Johnson, MAI, MRICS
TULSA, OK - Robert E. Gray, MAI, FRICS
WASHINGTON, DC - Patrick C. Kerr, MAI, SRA, FRICS
WILMINGTON, DE - Douglas L. Nickel, MAI, FRICS
IRR de MEXICO - Oscar J. Franck Terrazas, MRICS
IRR Caribbean - James Andrews, MAI, FRICS

Corporate Office

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Competitive Advantage



Client Satisfaction

Integra is committed to streamlining the management and delivery of assignments so our clients have confidence and direct contact with the appropriate individuals.

100% Valuation and Counseling

Integra's personnel, resources, data and techniques are focused exclusively on valuation and counseling. We do not offer other conflicting services, and we are independent and have only one interest in mind: The Client.

Industry Leasing Research

Integra, through its proprietary database - DataPoint - provides in-depth analytics throughout the US. This unrivaled database is compiled from more than 100,000 valuation assignments across multiple markets.

Elite Professionals

Integra has over 165 MAIs and more than 30 CREs, more than any other company. With Integra, you get the broadest national coverage with over 60 offices throughout North America and over 900 'best in class' valuers.

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