

HELM BIO

Helm Property Management has a reputation for implementing creative solutions to complex real estate issues. Our principal strength is our ability to direct and manage resources, to enhance property values for our clients, and to meet their specific objectives. We offer property management expertise with customized financial reporting capabilities. The principals and associates of Helm Property Management brings a wide range of disciplines and talents to the projects we undertake. We have a track record of serving clients ranging from local individual owners to national institutional clients. This enables us to draw upon a broad range of experience in developing management plans for our clients' portfolios.

Our organization offers a wide range of technical expertise, outstanding customer service, creative and assertive marketing, and superior accounting and reporting abilities. We pride ourselves in establishing client relationships that allow ease in the flow of information between owner and manager, to simplify the tasks of the owner and to ensure meeting the owner's investment objectives. The advantage of working with Helm Property Management is the personal pride we take in our effort to design a strategy and management program that successfully meets the needs and requirements of each owner.

Helm Properties Company Overview

Lease Transactions: Brokered 15 deals totaling 107,971 sf in the last 365 days

Top Tenant Clients: NCHF LLC, Thrifty Bargain, The Habit Burger Grill, Pieology Pizzeria

Current Availabilities: Represents 28 available spaces for lease totaling 163,067 sf

Landlord Representation: Owner's representative for 44 buildings totaling 951,753 sf of RBA

Properties For Sale: Represents 32 properties for sale totaling 79,857 sf of RBA valued at \$74,332,000

Sale Transactions: Brokered 31 transactions totaling 820,175 sf valued at \$149,376,871 in the last 3 yrs

True Owner: Owns 8 properties totaling 224,363 sf

Property Manager: Manages 8 properties totaling 217,126 sf



Jeffrey T Helm
Broker

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PROPERTY MANAGEMENT SERVICES

Helm Property management manages well over a million square feet of commercial properties throughout Northern & Southern California. We aggressively work toward reducing operating expenses and increasing cash flow for our clients. Our objectives include performance excellence, professionalism, communication, responsive/personal service and attention to detail. Our managers are attentive and highly responsive to the individual needs of our clients, as well as their tenants. Every management contract is approached with the sensitivity of a personal investment.

- High tenant retention
- Responsive to tenant service calls
- Aggressive receivable collections
- Regular communication with owner
- Preparation of fiscal operating budget
- Expense control/revenue maximization
- Preventative maintenance program
- Regular detailed inspection of each property
- Prepare scope of services for vendor bidding
- Supervision of contractors/vendors
- Maintain property files/tenant records
- Maintenance personnel services (optional)
- Construction management (optional)
- Marketing/leasing (optional)



ACCOUNTING SERVICES

Helm Property Management recognizes the importance of a highly skilled accounting team. Our accounting team works hand in hand with the property manager to service our clients and tenants. We utilize AppFolio & Yardi property management and accounting software programs and can provide in-depth detailed monthly financial statements or simple Excel spreadsheets, based on what our clients prefer. The accountants are involved in the accounts payable and accounts receivable process, the preparation of the annual operating budget, annual reconciliation, cash flow projections, and owner distributions.

- Customized reporting
- Preparation of cash basis and/or accrual basis reports
- Preparation of monthly cash flow with budget comparison
- Monthly variance reports
- Preparation of monthly rent roll
- Monthly receivables/aging report
- Monthly distributions to owners or calculation of cash required
- Monthly rent statements
- Expense reconciliation
- Tenant account auditing
- Cash management including maintaining money market and checking accounts
- Compliance with providing property information for loan covenants
- Coordinate property audits
- Coordinate project tax returns



MARKETING/LEASING SERVICES

If the owner so desires, Helm Property Management has the capability to provide marketing and leasing services for our clients. These services range from managing and coordinating the marketing efforts of the exclusive listing agent to directly leasing new or renewal transactions on behalf of the owner. If the property has an exclusive agent, we have the expertise to coordinate all marketing efforts between the agent, the tenant and the owner.

If HPM is responsible for the marketing, we will prepare fliers, install marketing signs, post information on the Internet, prepare proposals, negotiate terms and prepare the lease. Our team has been working with the Northern & Southern California brokerage community for over thirty years and we have established strong ties with the top brokers in every field and market. This is an optional service.

- Manage and coordinate marketing program of exclusive agent
- Coordinate direct marketing
- Prepare brochures, proposals and lease documents
- Communicate with owner and negotiate lease
- Cooperate with all procuring brokers



MAINTENANCE SERVICES

The ability to respond as quickly as possible to a tenant's service call is our in-house maintenance team's top priority. Tenants expect and appreciate it when the property management team responds immediately to make repairs to their premises. A lack of responsive service can often be the reason they elect not to renew their lease. We use a state-of-the-art work order software program allowing us to instantly distribute work to our maintenance force in the field via their wireless devices and tenants can go online to send us work orders for immediate response. Our maintenance team is always friendly, knowledgeable, service oriented and they follow through expediently. They know that they represent our clients and they understand how important it is to establish a positive rapport with tenants and vendors.

- Highly-skilled building engineers
- Responsive to tenant service calls
- Prepare preventative maintenance program
- Directly resolve most repair/maintenance issues
- Enhance positive relationships with tenants and vendors
- Available on an hourly as needed basis
- Cost effective maintenance for properties



RETAIL MANAGEMENT EXPERIENCE

Helm Property Management retail portfolio includes neighborhood shopping centers and strip shopping centers. We understand the management intensity of working with both sophisticated anchors and small, local retailers. Retail management demands experience in percentage rents, the importance of maintaining a pristine center, understanding the need to create just the right balance of various types of retailers, the parking demands and signage control. We are aggressive when it comes to graffiti control, trash, sidewalk and parking lot maintenance. Keeping our retail centers full and attractive yet keeping expenses in control is a number one priority with Helm Property Management.

- Neighborhood/community retail centers
- Understand unique management of sophisticated anchor or smaller retail tenant
- Calculate and bill percentage rents
- Graffiti controls
- Parking controls



R&D/INDUSTRIAL/WAREHOUSE MANAGEMENT EXPERIENCE

Helm Property Management has an extensive background in managing every type of industrial product, including big-box warehouse, free-standing R & D buildings and multi-tenant industrial buildings or what is commonly called incubator space. We have an in-depth understanding of what it takes to manage industrial properties and their tenants. In addition to our management and marketing experience, the members of the HPM team have been involved in the development, renovation and liquidation of industrial properties throughout Northern & Southern California. Helm Property Management recognizes the importance of monitoring any hazardous materials that may be used by industrial and high tech tenants. Regular property inspections are critical to ensure that industrial tenants do not store unsightly pallets or equipment in inappropriate locations.

We are extremely familiar with the calculation, billing and collection of triple net CAM expenses and industrial gross rents. We recognize that managing industrial property is completely different from managing office property, ensuring that owners achieve maximum value from their real estate investment. Furthermore, the industrial tenants appreciate the in-depth knowledge of our professional managers. When it comes to managing industrial properties, Helm Property Management is the property management organization to hire.



COMMERCIAL ASSOCIATION MANAGEMENT EXPERIENCE

Managing a commercial association is completely different from a typical commercial property, and Helm Property Management Company fully understands the difference. HPM has the unique expertise in managing many commercial associations from single building/condominium projects to major business parks consisting of several hundred acres. We work with the various owners to create the association budget and bill the owners their pro-rated share of the association dues. We organize and lead the annual association board meetings and monitor the upkeep of the common area to the satisfaction of all Owners involved.

- Manage commercial owners association
- Create common area budget
- Calculate and bill owners' dues
- Supervise vendors to maintain common area
- Conduct association meetings
- Communicate with owners



FACILITY MANAGEMENT

Helm Property Management offers facility management services to those companies that want to focus on their core business, rather than assign internal personnel to manage their facility. Companies elect to outsource their facility management needs to Helm Property Management to provide day to day maintenance services, lease management, internal moves, remodeling, as well as overall facility management coordination. Our online maintenance work order software allows our clients to easily complete a work order for everything from installing white boards to reporting a roof leak.

HPM will:

- Coordinate internal moves and supervise all service vendors
- Calendar critical lease dates and manage our client's lease
- Review all service contracts & lease documents
- Review and analyze CAM expenses & reconciliation invoices
- Provide budgetary numbers for facility expenses
- Communicate with client's landlord on as needed basis





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