

Private Managed Accounts

Let CRE experts help diversify your investment portfolio.

EXPERT ADVICE TO BUILD CRE PORTFOLIOS

CrowdStreet Advisors' Private Managed Accounts leverages CrowdStreet's commercial real estate (CRE) investment expertise to provide clients with custom CRE investment advice and portfolios, simplifying investing with dedicated team support. Whether you are a first-time CRE investor or a seasoned veteran who prefers to partner with CRE experts to identify the right opportunities, the CrowdStreet Advisors team will help you build a custom portfolio designed around you and your objectives.

Your investment needs are our top priority and we'll use our 60+ years of combined private equity real estate expertise to provide you with ongoing support and recommendations to meet your individual investment goals. Our expert team is focused on providing our clients with a personalized experience by hand-picking CRE opportunities, incorporating a strategy of diversification, and simplifying the investment process. The CrowdStreet Advisors team always acts in your best interest and embraces the fiduciary standard of care.

PRIVATE MANAGED ACCOUNTS INCLUDES:



INVESTMENT ADVICE

Personalized recommendations guided by your own investment objectives, attitude toward risk, time horizon, and other considerations



DEDICATED SUPPORT

Dedicated team support with a Client Relationship Manager as your point of contact and a designated Portfolio Manager



CUSTOMIZED PORTFOLIO

CRE portfolio construction by your Portfolio Manager based on your needs and designed to fit holistically with your other investments



INVESTMENT GOVERNANCE

Periodically reviewed, individualized Investment Policy Statement (IPS) that guides all investing decisions



PERFORMANCE METRICS

Advanced reporting and portfolio reviews



MINIMUM BALANCE

Minimum starting account balance is \$250,000



“CrowdStreet is committed to only publishing institutional-quality commercial real estate investment offerings, and your personal Private Managed Accounts team will build a portfolio that is right for you.”

DIVERSIFY WITH INSTITUTIONAL-QUALITY CRE OFFERINGS

CRE is an alternative asset class that provides portfolio diversity because its performance isn't typically correlated to the stock market. Private commercial real estate can complement your investment portfolio and may lower the overall volatility of your returns.

With CrowdStreet Advisors' Private Managed Accounts, clients have direct access to real estate opportunities for building a customized and diversified CRE portfolio with a minimum starting account balance of \$250K. Private Managed Accounts clients invest in expertly reviewed, institutional-quality offerings on CrowdStreet's marketplace based on guidance from our team. Each Sponsors' investment offering is subjected to a 26-point objective review process by our experienced Investments team to ensure both the Sponsor and the offering meet our strict marketplace requirements. CrowdStreet is committed to only publishing institutional-quality commercial real estate investment offerings, and your personal Private Managed Accounts team will build a portfolio that is right for you.

WHY YOU SHOULD USE PRIVATE MANAGED ACCOUNTS

- Personalized CRE investing service for high-net-worth investors that is tailored to your individual investment goals and risk profile
- Professional CRE Investments team
- Diversify your portfolio with the CRE alternative asset class to complement your existing investments
- Gain direct access to expertly reviewed, institutional-quality CRE investments
- Simplify CRE investing with documentation handled by our expert team
- Flexibility to work directly with you, or partner with a financial advisor as an extension of your financial advisor's team

CONTACT US:

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