

An aerial, stylized illustration of a city skyline with various skyscrapers and buildings, set against a sunset or sunrise background with warm orange and yellow tones. The illustration is positioned on the left side of the slide, partially overlapping the blue background.

Do You Need an Asset Manager?

A 15-question self-assessment to evaluate whether your portfolio needs strategic oversight. Takes 5 minutes. Delivers instant clarity.

How to Use This Checklist

Answer Yes or No to each of the 15 questions across five key dimensions. There are no wrong answers — only honest ones. At the end, count your "Yes" responses to find your stage.

What We Assess

- Portfolio size & complexity
- Financial performance red flags
- Time & expertise gaps
- Growth readiness
- Risk exposure

Questions 1–3: Size, Scale & Time

1

Portfolio Size & Scale

I own **3 or more properties** or a single property worth over **\$2 million**.

2

Geographic Spread

My properties are located in **2 or more different cities** or markets.

3

Time Availability

I spend **less than 5 hours per week** actively thinking about my portfolio's strategy.



Questions 4–6: Financial Performance

NOI Has Stalled or Declined

My net operating income (NOI) has stayed **flat or declined** over the past 2 years.

Cap Rate Blind Spot

I do **not know the current cap rate** for each of my properties off the top of my head.

Debt Terms Untouched

I have **not refinanced or reviewed my debt terms** in the past 18 months.

Questions 7–9: Strategy & Planning

No Exit Plan

I do not have a clear timeline or strategy for when I will **sell or reposition** each asset.

Reactive CapEx

My capital expenditures are **reactive** (fix when broken) rather than **planned** (value-add upgrades).

Tax Optimization Gaps

I am not sure if I am maximizing **depreciation, cost segregation, or 1031 exchange** opportunities.

Questions 10–12: Operations & Market Awareness

→ Investor Reporting

I have investors or partners who expect **regular, detailed financial updates**.

→ Market Monitoring

I do **not actively track** local market trends, rent comps, or absorption rates for my asset types.

→ Lease Strategy

My lease renewals and escalations are handled **ad-hoc** rather than as part of a portfolio-wide plan.



Questions 13–15: Risk, Growth & Expertise

1

Risk Exposure

I am not confident I could identify **which asset poses the biggest risk** to my portfolio today.

2

Growth Ambitions

I plan to acquire **2 or more additional properties** in the next 24 months.

3

Professional Background

I am **not a full-time real estate professional** (e.g., doctor, lawyer, entrepreneur, corporate executive).

Score Your Results

1

Three-stage scoring system:

Property-Only Stage
(0-4 Yes) -
portfolio manageable,
focus on property manager

2

Three-stage scoring system:

Transition Stage
(5-9 Yes) -
strategic gaps emerging,
start interviewing firms

3

Three-stage scoring system:

Full Asset Management
Needed (10-15 Yes) -
dedicated oversight
required, hire within
60 days

Count Your "Yes" Responses

Your total score places you in one of three stages. Each stage has clear, actionable next steps — from finding a great property manager to hiring a dedicated asset management firm within 60 days.



Pro Tip: Re-take this checklist every 6–12 months as your portfolio grows. The moment you cross into Transition Stage, act fast. Waiting is where most investors lose money.

What Your Score Means

0–4 Yes: Property-Only Stage

Your portfolio is manageable. Focus on a top-tier property manager and re-take this checklist in 12 months.

5–9 Yes: Transition Stage

Strategic gaps are costing you money. Schedule a portfolio audit and set a 90-day deadline to evaluate strategic help.

10–15 Yes: Full Asset Management

Your portfolio demands dedicated oversight. Interview 3 firms within 30 days — every month of delay leaves money on the table.

Remember: The cost of hiring an asset manager is predictable. The cost of *not* hiring one — in missed refinancing, suboptimal exits, and flat NOI — is often **3x to 5x higher**.

Bonus: Asset Manager Interview Scorecard

Rate each firm 1–5 on the following criteria. Total possible: 30 points per firm.

Criterion	Firm A	Firm B	Firm C
Track record with similar assets	___ / 5	___ / 5	___ / 5
Reporting transparency & frequency	___ / 5	___ / 5	___ / 5
Fee structure alignment	___ / 5	___ / 5	___ / 5
Communication clarity	___ / 5	___ / 5	___ / 5
Technology & data capabilities	___ / 5	___ / 5	___ / 5
References & case studies	___ / 5	___ / 5	___ / 5
TOTAL SCORE	___ / 30	___ / 30	___ / 30

Ready to act? If you scored 5 or higher, book a free, no-obligation portfolio review. We'll identify hidden value leaks and show you where strategic oversight can improve your returns.



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