



RETIREMENT CLEARINGHOUSE ("RCH")



TRANSACTION: 44,480 SF/ CORPORATE HQ

LOCATION: TWO SILVER CRESCENT/
AYRSLEY- CHARLOTTE, NC

LANDLORD: NEW FORUM

THE REQUIREMENT

Match the fintech company's continued revenue growth with a corporate Headquarters location that would attract and retain talent.

WHAT WE WERE UP AGAINST

While RCH continued to gain immense success with the creation of Auto Portability, a revolutionizing technology that allows for the seamless transfer of retirement savings from one plan to another, there was still a lot of capital-intensive work to be done. Keeping real estate costs in check was a high a priority, even with the goal of creating a "Wow" space that would serve to propel the company forward.

THE SOLVE

We analyzed existing buildings along with build-to-suit opportunities in four counties. Ultimately, a lease was struck for two floors in Ayrsley's "Two Silver Crescent." Significant concessions were negotiated on behalf of RCH, rendering the deal "leagues ahead" of any of the competitors. Additionally, a Jobs Development Investment Grant (JDIG) was negotiated with the state of North Carolina, reducing RCH's net effective rental rate significantly below market, over 11 years.

THE RESULT

- Notable names such as Vanguard, Fidelity, TIAA and Empower have all joined the "Portability Services Network" consortium, created to execute Auto-Portability.
- The goal: Reduce the \$92billion in savings that disappear in the United States each year, when an employee, unknowingly, or without proper guidance, cashes out when they switch jobs. RCH will continue to service and grow the consortium.

BEN SPEIR, CCIM

DIVISION PARTNER, OCCUPIER SERVICES

bspeir@trinity-partners.com

704.258.6054

BO BLIGHT

ASSOCIATE, OCCUPIER SERVICES

bblight@trinity-partners.com

704.619.1859



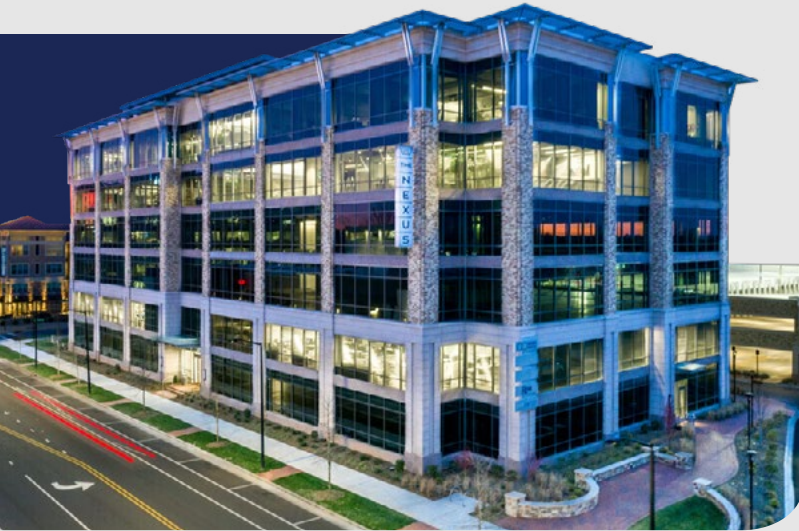


TRANSACTION: 33,242 SF

LOCATION: THE NEXUS AT WAVERLY - CHARLOTTE, NC

LANDLORD: JV - CHILDRESS KLEIN/REA FAMILY REAL ESTATE

TYPE: HEADQUARTER & SERVICE CENTER LEASE ACQUISITION



THE REQUIREMENT

Secure and build a dynamic headquarters location for Remi's executive functions and proprietary service center operation.

WHAT WE WERE UP AGAINST

Two years prior to its lease expiration, Remi's then current headquarter office park was purchased by an out-of-market global real estate firm, creating a vastly different Landlord/Tenant dynamic. Navigating the new economic landscape would prove to be difficult.

THE SOLVE

Engage the market well in advance of Remi's lease expiration. Core Class-A alternatives were sought, including two new mixed-use developments along the I-485/South perimeter. Pre-leasing negotiations were undertaken with two competing developers, driving below market pricing for Remi.

Ultimately, Remi chose to relocate to Waverly, pre-leasing 1 1/4 floors at The Nexus. By signing a lease before the building was constructed, Remi secured a rental rate that proved to be almost \$5.00/SF less than the price offered to the market once the building was delivered. The terms proved to be so attractive for Remi that the Landlord mandated the execution of a Non-Disclosure Agreement.

THE RESULT

- Remi's new headquarters was designed and built to attract and retain talent, ensuring continued operating success for current and future ownership.

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bblight@trinity-partners.com

704.619.1859





TRANSACTION: 42,094 SF

LOCATION: MERIDIAN BUILDING - COLUMBIA, SC

LANDLORD: HPT SUNBELT PORTFOLIO

REAL ESTATE TYPE: LAW FIRM HEADQUARTER
LEASE ACQUISITION



THE REQUIREMENT

Create a headquarters location for MGC Law in Columbia that exemplifies the firm's roots and success, while maintaining cost savings measures for the life of the lease term.

WHAT WE WERE UP AGAINST

MGC had been in a ten-year sublease in one of the top Class-A buildings in downtown Columbia. With limited options to duplicate a similar high-profile environment, the firm requested lower expenses for the new lease term, without sacrificing location, fit and finish.

THE SOLVE

Using a bifurcated approach, we identified lower cost options that could house back-office operations, while keeping attorneys and conferencing spaces in a Class-A environment. Parking expenses would be reduced due to a majority of back office and support functions moving to the suburbs with free surface parking. Build-to-suit and purchase options were on the table from day 1, giving MGC both leverage and greater cost control measures going forward.

After a two-year process, the firm successfully inked a lease to remain in its existing space at the Meridian Building, but now as a direct Tenant. In doing so, the firm rewarded its equity members by not only securing an aggressive rental rate structure, but by securing concessions over the life of the lease term which far exceeded expectations. Terms of the transaction were such that an NDA was mandated by the Landlord; standing as evidence today of the victory for MGC.

THE RESULT

The firm was able to maintain its culture by keeping the entire Columbia workforce at the same location, while netting similar cost benefits to the bifurcated back-office strategy.

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ASSOCIATE, OCCUPIER SERVICES

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704.619.1859



THE METROPOLITAN IN MIDTOWN CHARLOTTE

TRANSACTION: 1,468 RSF

LOCATION: MIDTOWN

LANDLORD: NORTHWOOD INVESTORS

REAL ESTATE TYPE: OFFICE



THE REQUIREMENT

SUB-2,000 SF SPACE WITH
WALKABLE RETAIL AND AMENITIES

CLEAR EXPANSION OPPORTUNITIES
FOR FUTURE GROWTH

6 MONTH SEARCH TIMEFRAME

D.A. Everett, a Raleigh-based construction company, was expanding into Charlotte focused on a location and workspace to help attract and retain top talent. Their abbreviated search timeline limited their options to pre-built spec suites in an active, competitive market.

WHAT WE WERE UP AGAINST

LACK OF AVAILABLE SPEC SUITES IN
SMALLER SIZE RANGES

COMPETITION FOR SPACE IN
CHARLOTTE'S MOST POPULAR
SUBMARKETS

D.A. Everett knew what it wanted. The challenge was actually finding it. Spec suites in vibrant, walkable, and amenitized locations were scarce. We moved to quickly evaluate all options in Charlotte's most popular submarkets: South End and Midtown.

THE SOLVE

With the rest of the market focused on existing spec suite inventory, we dug deeper to uncover spec suites that were planned or currently under construction. We found a space, performed our due diligence and negotiated with the Landlord to execute a competitive deal on a short-term lease that maximizes D.A. Everett's inevitable future growth.

WHAT'S NEXT

Expansion looks to be on the horizon as DA Everett continues to grow, both in Charlotte and companywide.



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