

# Real Estate



## Future-proof your portfolio

In an industry marked by long development cycles, vision matters. Projects take years to move from planning to construction. Meanwhile, your value drivers are shifting.

New social, technical and demographic trends are influencing the real estate agenda. Stakeholder expectations are evolving as end users, investors and governments place new demands on the industry.

Build a portfolio that can withstand change. Wipfli helps real estate leaders plan and equip their businesses to meet these challenges.

**Extensive insight** in real estate and real-estate-intensive industries.

## Performance and value

Unlock the financial and operational opportunities in your business. We help you reduce your taxes, increase your cashflow and boost the productivity of your projects. Plus, our use of analytics and benchmarking turns data into insights, driving better and faster business decisions.

Our team also creates value by providing the tools and insight for business transformation. We do this through traditional paths like revenue and tax management in tandem with industry-specific support for emerging technology, incentive opportunities and process innovation.

**WIPFLI**

# Singular resources that open new doors to success

Tailored services for your real estate company's financial, operational and strategic needs.

## Tax strategy and consulting

Wipfli works with real estate investors, funds and development groups on their tax strategy. Our real estate specialists consult on formation, how investors and developers get paid, depreciation, accounting methods, §1031 utilization and more. We focus on proactive tax advice and staying ahead of the game with strategies to tackle new tax legislation.

## Financial advisory

Sound decisions begin with accurate financials. Our audit and accounting services are tailored to funds, REITs and entities with HUD financing. Meet the increasing demand for data and improve your investor experience. We create efficiency and transparency in your reporting systems, satisfying investor expectations while saving you time and resources.

## Cost segregation study and 179D tax deduction

A cost segregation study identifies personal property and land improvement costs that can be depreciated at an accelerated rate. A shorter depreciation period means higher depreciation deductions, greater tax savings and improved cash flow.

Significant federal tax deductions for creating energy-efficient commercial projects often go unutilized, so we also provide services around the 179D energy efficient tax deduction to help you reduce your tax liability and increase cash flow.

## Contract compliance monitoring

Analyze third-party contracts and evaluate key risk areas to ensure activities are conducted according to contract requirements. Identify overpayments and overbillings and pursue cost recovery options without jeopardizing valuable relationships.

## Opportunity zones

Qualified opportunity zones offer tax advantages for investments in designated areas. Wipfli assists developers in establishing and structuring qualified opportunity funds (QOF). Support services include audit and attestation, tax reporting, plan structuring and software solutions for QOF management.

## Cybersecurity, fraud and risk advisory

Large fund transfers make the real estate sector a lucrative target for cybercriminals, and connected building systems open new doors to attack. Businesses of all sizes need to take proactive steps to protect their client information. Our multipronged security approach addresses internal and external vulnerabilities.

## Technology consulting

Get the information you need, when and where you need it. We provide an end-to-end CRM solution to coordinate projects, communicate with stakeholders and control your profit. You can also outsource your IT needs to Wipfli or consult our specialists on IT strategy.

## Succession and business planning

We listen to your goals, delve into your business and present a variety of efficient options for successful transition. Then, we act as unwavering advocates and guides to deliver the exit strategies that achieve your objectives.

## Let's get started

Contact us and find out how Wipfli can help your real estate company build for the future.

[wipfli.com/real-estate](https://wipfli.com/real-estate)