



Effective Due Diligence for Non-listed Real Estate Investments

2 – 10 March 2021, Online Course

2 March 2021



10.00 – 11:00 (CET)

Course introduction

- Welcome by INREV
- Course introduction and objectives
- The role of due diligence in today's market

Norbert Bol
(Course leader)
Sweco

11:00 -12.00 (CET)

Overview of the due diligence process from an investor's perspective

- How to organise an effective due diligence process
- The role of INREV's tools
- Hot issues and new trends in the due diligence process
- Tackling the challenges: lesson learnt

Jan van Bakel
CBRE GIP

3 March 2021



10:00 - 11.00 (CET)

The investor's selection process

- Investor demand's
- Selection criteria - track record, cultural fit and weighing of factors
- The role of INREV's tools

Jerome Berenz
Allianz Real Estate

11.00 -12:15 (CET)

Due diligence process from the manager's perspective

- Preparation for due diligence
- Mapping and managing the process
- The role of INREV's tools
- Importance of transparency

Faris Mansour
PGIM Real Estate

4 March 2021



10:00 – 11:00 (CET)

Legal and tax due diligence

- Overview of the process
- Preparing for investors' reviews
- Key issues including distributions, corporate governance and exits
- Tax and regulatory developments

Nicole Mitchell
Aviva Investors

11:00 – 12:30 (CET)

Case Study I

Norbert Bol
Sweco



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9 March 2021



10.00 - 11.00 (CET)

Risk management for non-listed real estate investments

- The role of risk management in the due diligence process
- Key risks relevant for non-listed real estate investments and how to identify them
- How to assess a manager's capability to manage and mitigate risks

Kim Haasbroek
PGGM

11:00 – 12:15 (CET)

The role of Environmental and Social factors

- The role of sustainability and environmental issues
- How to incorporate social factors in the due diligence process
- How to manage investor's requests and requirements

Anne Böker
PATRIZIA

10 March 2021



10:00 – 11:00 (CET)

How to organise an operational due diligence

- The operational due diligence process
- Red flags and lessons learned

Amilcar Grot
Blue Sky Group

11.00 - 12.30 (CET)

Case study II

Alexander Tilson
Threadmark

12.30 - 12.45 (CET)

Course wrap-up

Norbert Bol
Sweco