



WELLSTEAD MANAGEMENT LLC

REAL ESTATE, ASSET & PROPERTY MANAGEMENT

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CAPABILITY STATEMENT

REAL ESTATE PORTFOLIO & ASSET MANAGEMENT

SERVICE OVERVIEW

Wellstead’s Real Estate Portfolio & Asset Management services provide institutional-quality oversight for complex real estate holdings. We act as ownership’s strategic partner—aligning property operations, capital deployment, and investment objectives through a single accountable platform.

Our comprehensive approach integrates lease, asset, and occupant-level data into a unified operating view—identifying opportunities, mitigating risk, and protecting returns across the portfolio lifecycle.

STRATEGIC FRAMEWORK

Our governance model separates strategic oversight from execution, defining clear strategic, tactical, and integration layers. This creates greater transparency, accountability, and leadership clarity—without operational drag.

We close the gap between investment thesis and ground-level operations—ensuring what’s happening on the ground always advances the client’s objectives.

KEY SERVICE AREAS

- ▶ Portfolio strategy & performance optimization
- ▶ Asset-level financial analysis & reporting
- ▶ Investment underwriting & due diligence
- ▶ Lease administration & rent roll management
- ▶ Capital planning & project oversight
- ▶ Acquisition & disposition support
- ▶ Tenant retention & occupancy optimization
- ▶ Market analysis & competitive positioning
- ▶ Risk assessment & mitigation

ASSET TYPES

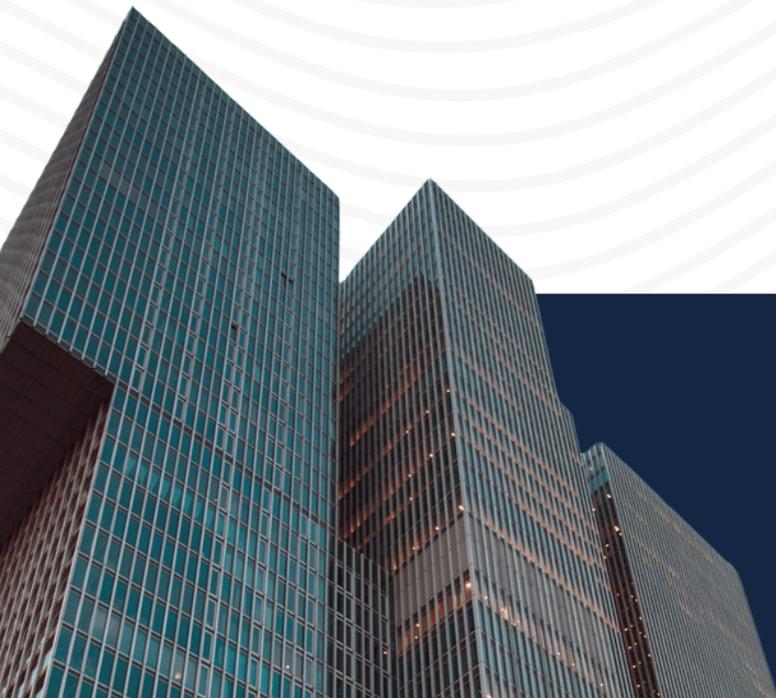
- ▶ Medical office & healthcare campuses
- ▶ Multi-tenant office portfolios
- ▶ Mixed-use & retail properties
- ▶ Industrial & logistics assets
- ▶ Higher education & institutional campuses
- ▶ Special-purpose & mission-critical facilities

ENGAGEMENT MODELS

- ▶ Full-scope owner’s representative
- ▶ Asset management oversight & reporting
- ▶ Transaction advisory & due diligence
- ▶ Portfolio optimization consulting
- ▶ Interim management & stabilization

WHAT WE DELIVER

- ▶ Unified real estate strategy aligned to investment goals
- ▶ Integrated operating view across all assets
- ▶ Actionable insights on cost leakage & space utilization
- ▶ Capital prioritization tied to value creation
- ▶ Institutional-grade reporting & governance



PAST PERFORMANCE

Chariot Allaire Partners
\$525K+ annual contract value
Acquisition & transition—Crozer Chester Medical Ctr
Allocation & reimbursement methodology design
Multi-tenant campus cost-sharing agreements

NAICS CODES

531312: Nonresidential Property Managers
531390: Other Real Estate Activities
541611: Admin & General Mgmt Consulting
541618: Other Management Consulting



DUNS Number
13-679-8219



UEI Number
-pending-