



THE  
PROVIDENCE GROUP  
EXCELLENCE IN RETAIL REAL ESTATE

PROUD PARTNER  
**XTEAM**  
RETAIL ADVISORS

# 2025 COMPANY OVERVIEW





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# A STRONG FOUNDATION

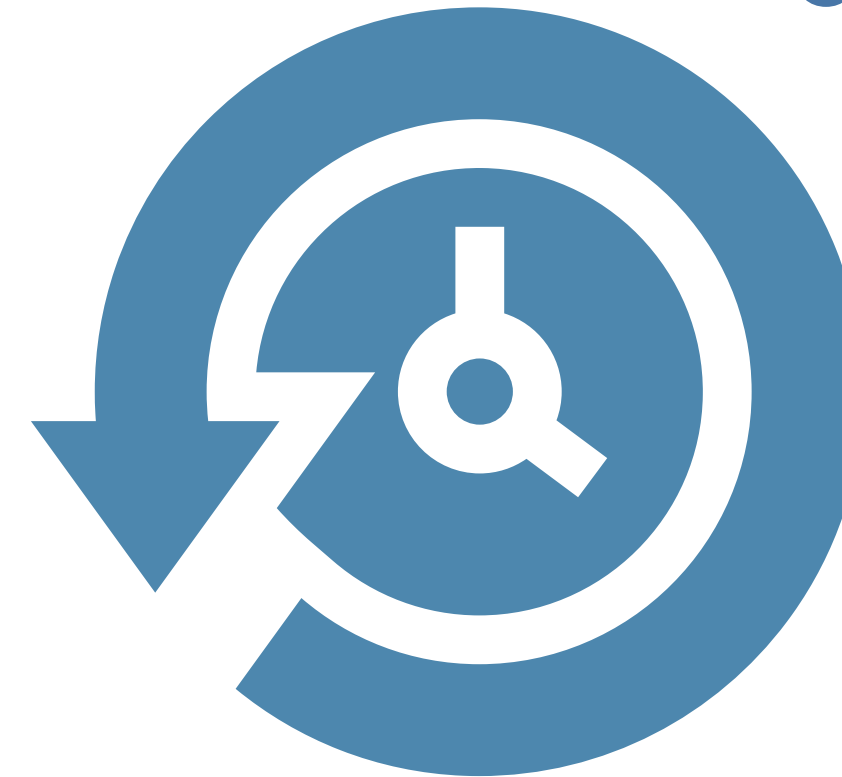
Founded in 2000, The Providence Group is built around a core group of people who are respected for both their integrity and experience in the industry. Each of our brokers brings knowledge of various disciplines to the company, diversifying and strengthening our offerings as a successful retail firm.



Uptown  
Charlotte, NC

## OUR COMPANY HISTORY

Employing a range of experience and expertise, The Providence Group was formed as a small, highly focused and client driven retail brokerage firm. We are committed to providing our customers a competitive edge through our in-depth knowledge of various local markets, relationships with area developers, and years of working with local, national, and regional retailers. By concentrating on what we do well, we have earned a reputation for being an invaluable resource to our clients. Today we specialize in site selection, sales & leasing, property management and disposition services throughout the Carolinas. The Providence Group builds lasting relationships with clients who value the attention and results that we produce. The Providence Group has completed over hundreds of transactions in the Southeast with these clients.



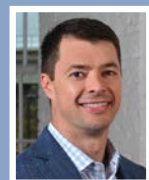
# PRINCIPALS



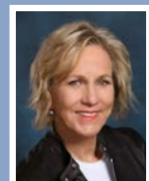
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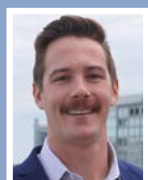
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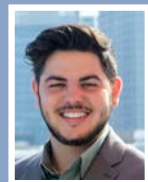
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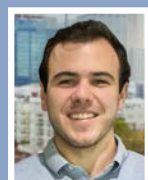
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EAST 54  
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# OUR TEAM

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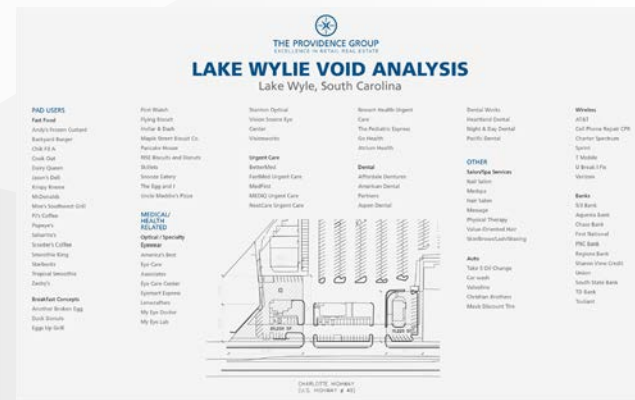


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# MARKETING PROCESS



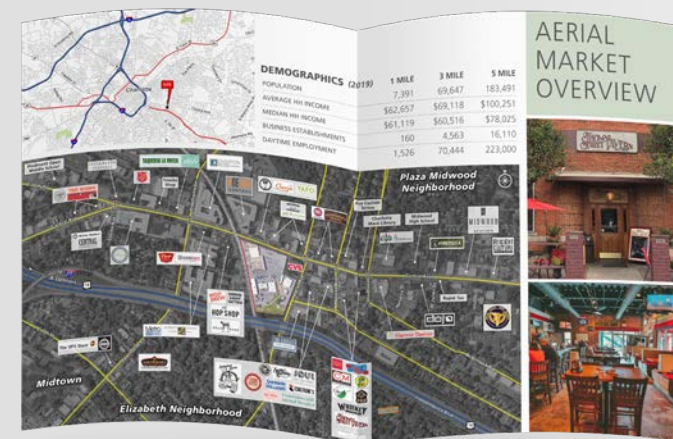
CELL PHONE STUDIES



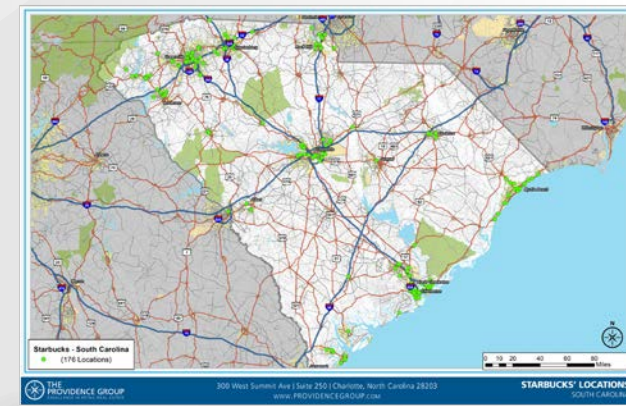
MARKET VOID ANALYSIS STUDIES



CUSTOMIZABLE DEMOGRAPHIC PROFILES



IN-HOUSE DESIGN TEAM



IN-HOUSE GIS ANALYST



IN-HOUSE SOCIAL MEDIA MARKETING

# CURRENT TENANT REPRESENTATION



# CURRENT LANDLORD REPRESENTATION



# CURRENT MANAGEMENT REPRESENTATION

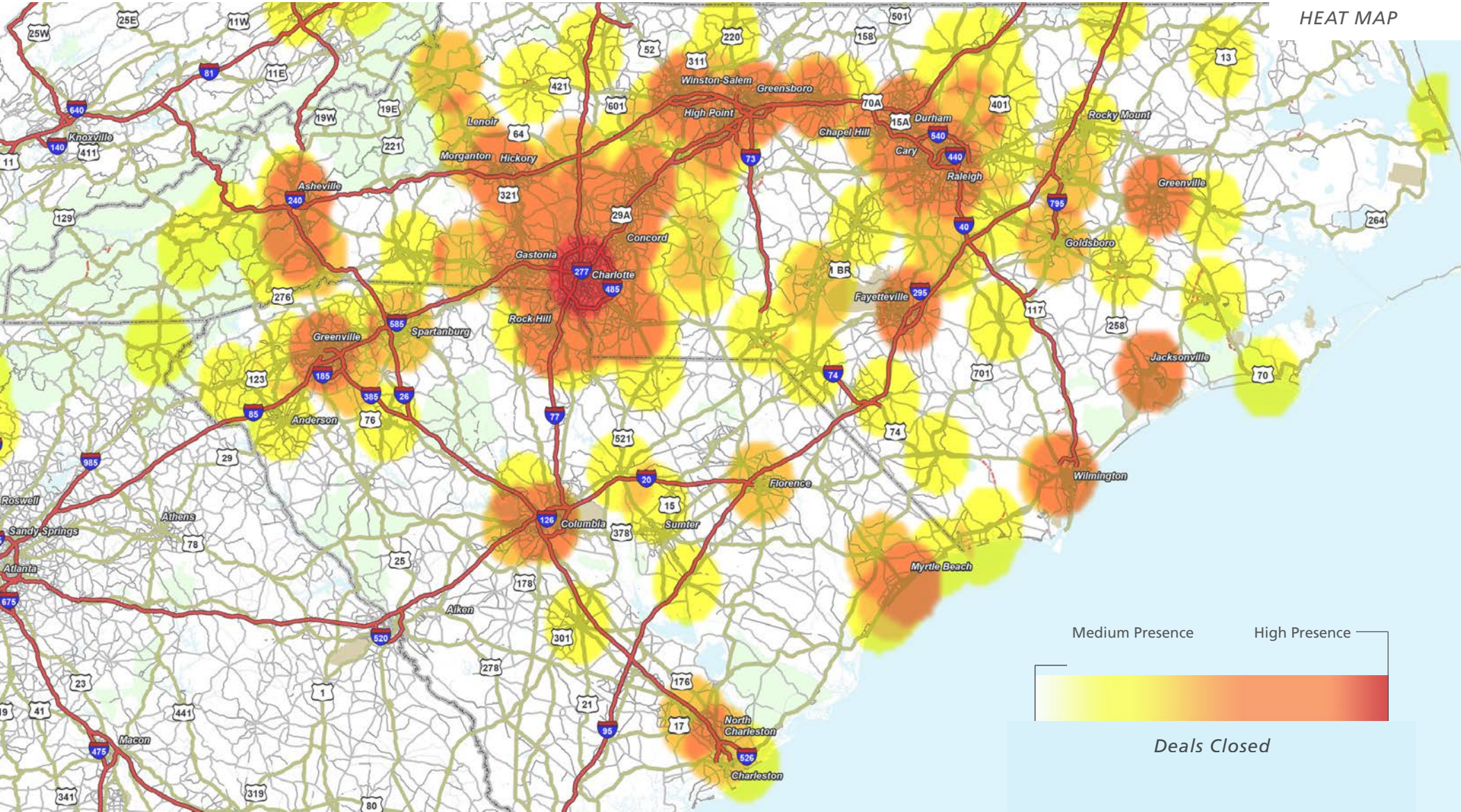




# OUR MARKET

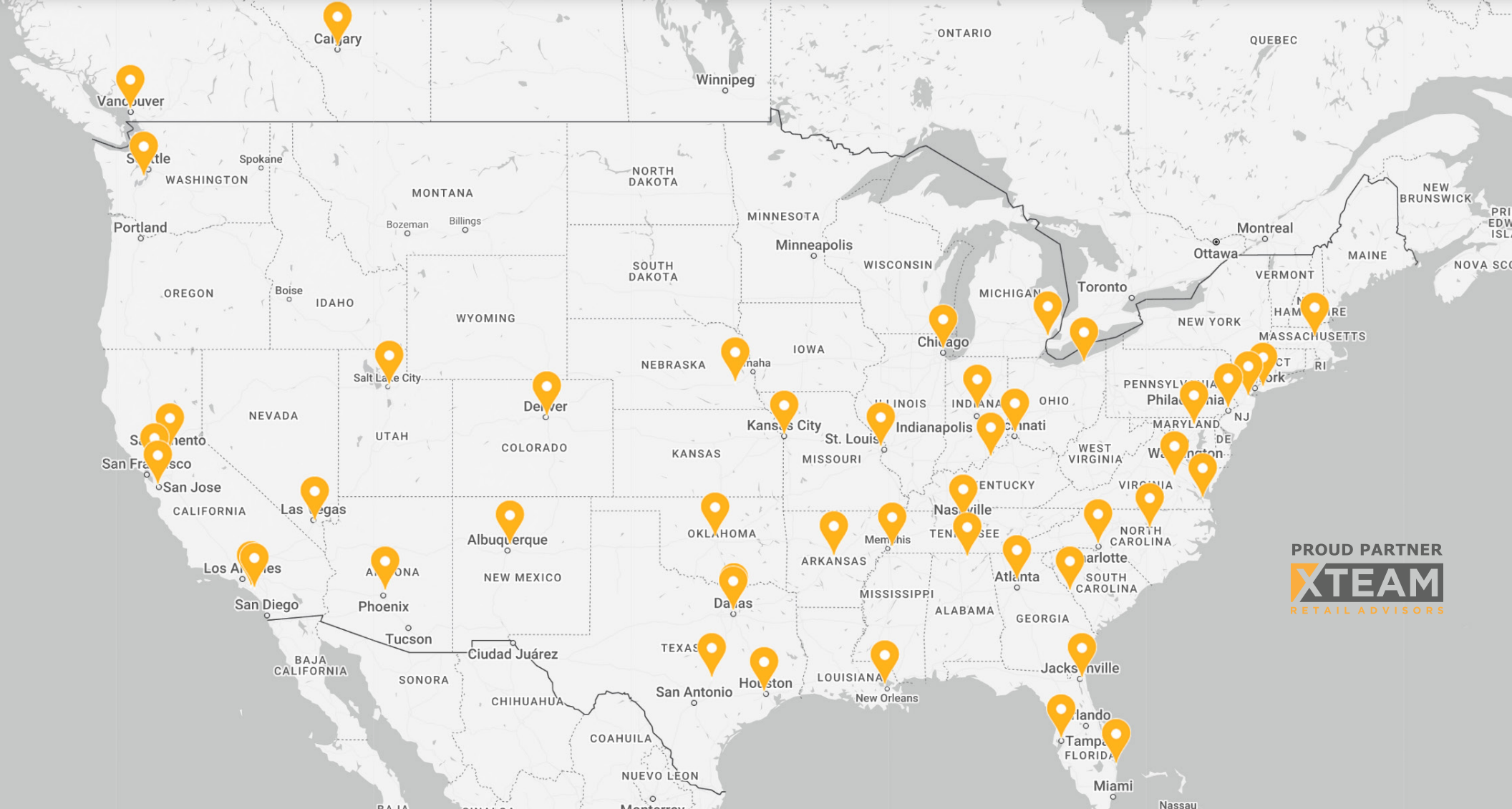
The Providence Group is a highly-focused and client-driven boutique retail brokerage firm. We are committed to creating a competitive edge for customers through in-depth knowledge and decades of experience in key local markets. We bring deep relationships with

area developers and deliver decades of expertise guiding retailers' expansion strategies including national brands, regional chains and local merchants. Our territory extends all over the southeastern United States.



## NATIONWIDE OFFICE LOCATIONS

X Team's partnership of small, mid-sized and boutique advisers has generated tremendous support and buy-in from key players in the retail industry. X Team Retail Advisors' unique structure integrates an alliance of retail real estate advisory offices into one dynamic and cohesive unit. Our very own Darren Wood, CCIM, heads the Southeast division of the Retail Advsor's Group.

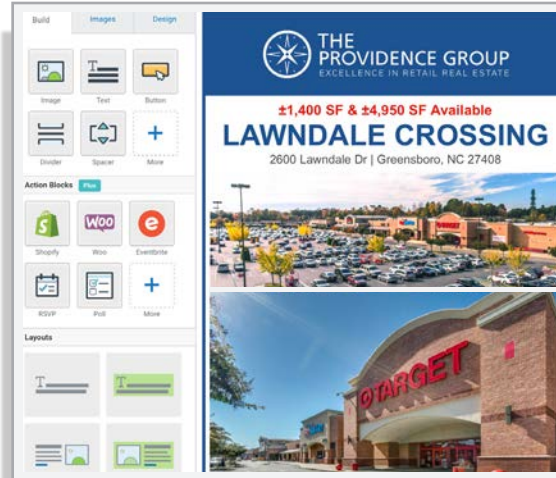


# LEASING PROCESS



## 0 - 30 DAYS

- Obtain site specific information from client, including survey, site plans, architectural drawings, exclusives and restrictions, etc.
- Develop marketing collateral to include comprehensive description of the development, aerial photography, site plans, maps, demographics, building elevations and more.
- Install on site advertising.
- Finalize list of target prospects with client.
- Prepare detailed request for proposal to be sent to top prospects.



## 31 - 90 DAYS

- Begin marketing campaign by meeting directly with target prospects.
- Report back to client regularly with results of meetings and further refine the target prospect list.
- Send RFP to top candidates with instructions and deadline for submission of proposals.



## 90+ DAYS

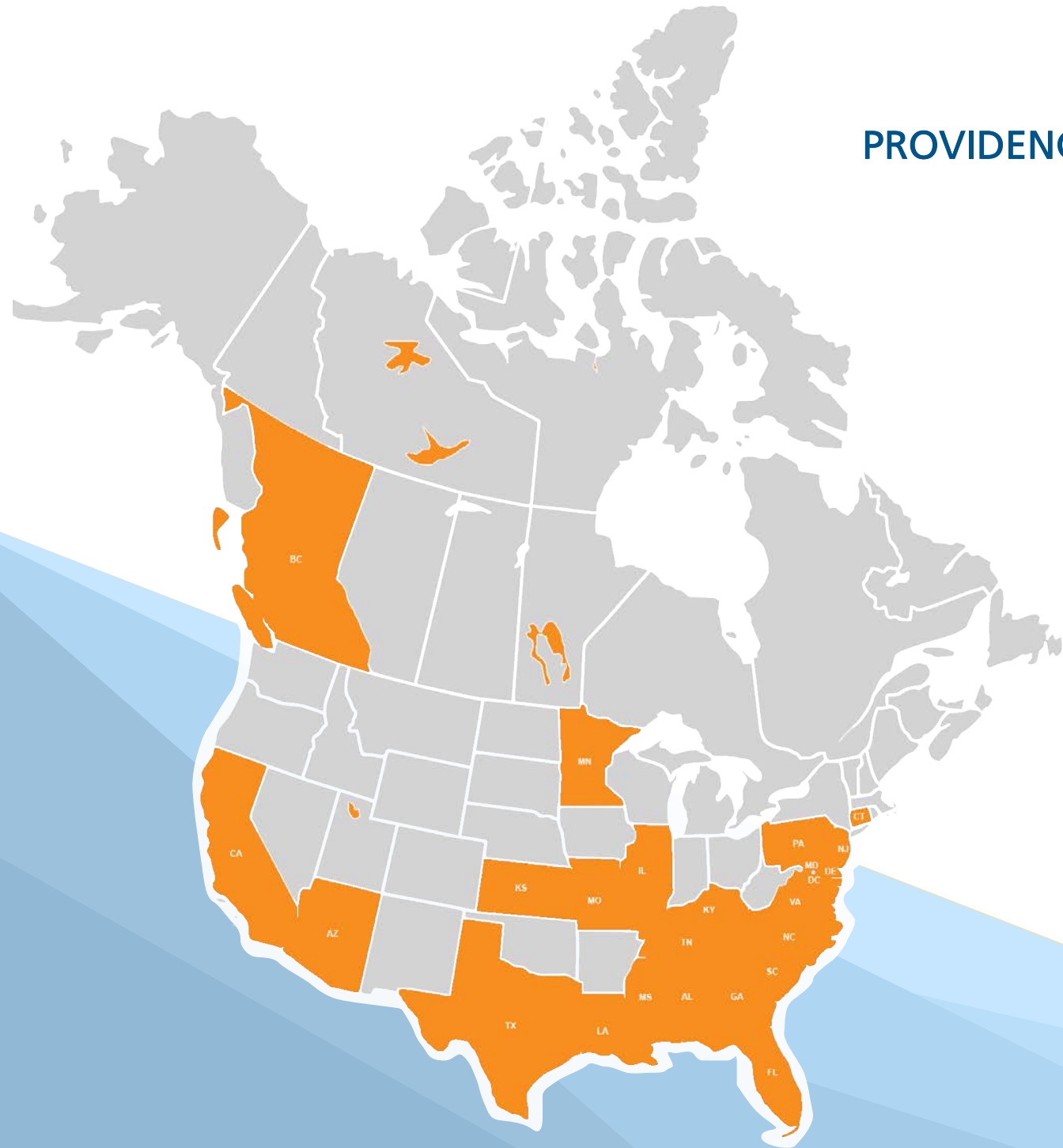
- Gather RFP responses and hold meetings with client and top prospects to further evaluate concepts and operators.
- Negotiate LOI's and leases.
- Assist tenants with pre-construction, construction & turnover.



Coastal North Town Center  
Myrtle Beach, SC



## PROVIDENCE GROUP CAPITAL



## PROVIDENCE GROUP CAPITAL

Providence Group Capital is a real estate investment and development firm focused on maximizing equity returns with integrity and professionalism. The firm possesses traditional ground-up and acquisition expertise but it's deep bench of relationships with sellers, consultants and industry insiders enables it to find and procure prime assets. Once these assets are under control, the team employs extensive market knowledge, conservative underwriting, thorough due diligence and creative vision to drive values for the benefit of its debt and equity partners.

Geographically seeking both core infill and suburban assets primarily in the southeast, Providence Group Capital pursues value-add commercial and residential sites. The principals of the firm have been involved in the development of over 12 million square feet domestically and internationally representing \$3.5 billion in total project development costs. Their experience in many regions allows the firm to pursue a wide range of entrepreneurial opportunities, delivering maximum results.

Providence Group Capital works on multiple product types including land assemblage, multifamily, office, retail/entertainment, adaptive reuse, and self-storage. As part of The Providence Group, we have in-house leasing and property management capabilities for all commercial projects.



*Market on Cherry  
Rock Hill, SC*



Asheville, NC



## PROVIDENCE GROUP CAPITAL

### REAL ESTATE ENTITLEMENT, USE AND ZONING

The Providence Group can go beyond the typical role of a real estate brokerage firm. Through the experience and expertise of Providence Group Capital, we are able to assist in obtaining all zoning and entitlements for properties at the request of our clients. We will navigate the zoning and entitlement process specific to a property's jurisdiction by attending meetings with city officials, county officials, and neighborhood organizations as well as any public hearings which are necessary to secure the zoning classification essential for the clients' use.

### DEVELOPMENT SERVICES

When clients do not have the in-house staffing required to develop real estate, Providence Group Capital is able to provide complete development services, if desired. We will represent clients in connection with the design and construction of individual projects or, on a programmatic basis, for multiple projects. On behalf of our clients, we will advise and negotiate agreements for architectural, engineering, testing and consulting services, as well as any additional agreements required for the construction of improvements for a project. This can include horizontal development, vertical development or a turnkey facility.

We assemble and manage a necessary pool of consultants to create a team which will develop a successful project for our clients. Providence Group Capital will conduct any necessary site planning, building planning and/or feasibility studies that will enable our clients to progress to the Letter of Intent and/or Purchase Agreement phase for a property. Upon securing control of a property for our clients, we will work with the team architects and engineers to formulate plans to permit and develop that property for their use. We supervise the process of obtaining site (civil) permits and building (architectural) permits for the construction of improvements to accommodate our clients' use of the property.

## DEVELOPMENT SERVICES (CONTINUED)

Providence Group Capital will prepare construction and development budgets for our clients to review and approve. Additionally, we will maintain and track project costs throughout the construction and development process. We coordinate the work of the project architect, the general contractor, and other consultants and professionals employed in connection with the design and construction of a project. We verify that construction of improvements is carried out in accordance with project plans and will manage pay requests, invoicing, and accounting.

Through our expertise in development and involvement on hundreds of successful projects, we can oversee a turnkey project or we can assist in smaller roles that are needed to ensure that our clients are able to open and operate their facility in the most efficient manner. We will customize development services as needed or desired by our clients.

## DEVELOPMENT SERVICES (CONTINUED)

- Coordination of the work of the project architect, the general contractor and other contractors, professionals, and consultants employed in connection with the design or construction of the project
- Participation in developing economical, efficient, and desirable design and construction procedures
- Rendering of advice and recommendations as to the selection of subcontractors and suppliers
- Submission to client any suggestions for changes which would improve the design, efficiency or cost of the project
- Supervising compliance with all terms and conditions applicable to client or the project contained in any governmental permit or approval required or obtained for the project
- Keeping client informed on a regular basis of the progress of the design and construction of the project
- Obtaining, certifications of occupancy or equivalent documents required to permit the occupancy of any such improvements
- Supervise, coordinate and inspect the progress of construction of the project and advise the client whether to approve or disapprove requests for payment made by the project architect and the general contractor, or by any other parties with respect to the design or construction of the improvements. Additionally to verify that the construction is being carried out substantially in accordance with the project plans and cause to be certified in writing by the project architect along with each construction draw request





**PROVIDENCE GROUP MANAGEMENT**  
EXCELLENCE IN COMMERCIAL PROPERTY SERVICES

## OVERVIEW

Operating under the name of Providence Group Management (PGM), we offer our clients first class management of their commercial real estate investments. Each commercial management program is critiqued and adjusted to meet the owner's long term goals. Frequent property inspections and face-to-face meetings with tenants, coupled with detailed financial reviews provide a foundation for management staff to protect and enhance the value of an asset.

By implementing enhanced management principles and practices, PGM strives to increase the value of our client's assets. Common feedback from our Property Management clients is more efficient rent collections, improved accounting reports, better record keeping, proactive preventative maintenance, expedited reconciliations, and market driven CAM rates.



Optimist Hall  
Charlotte, NC

# MANAGEMENT SERVICES WE OFFER



# FLEXIBLE MANAGEMENT CONTRACTS

We recognize that each of our clients have individual goals for their assets. For this reason, we offer a variety of management services to choose from. To reduce the stress of owning a real estate asset it is ideal for PGM to provide full service property management. However, if an owner is not ready to implement a full service management agreement there are different types of management services we can provide. Each commercial property is unique and owners may require specialized services. Please let us know how Providence Group Management may better suit your needs and we can create a customized management plan.

# PROPERTY MANAGEMENT SOFTWARE

In today's world, staying ahead of available technology and taking advantage of it to improve our service to clients is an important part of our business. Providence Group Management utilizes MRI Accounting Software and Avid Exchange to streamline managerial functions efficiently for our clients.

MRI Software is a leader in providing an array of customized reports to suit our clients needs. Avid Exchange provides a paperless invoice approval process, resulting in expedited vendor payments and improved AP processing. Avid Exchange also allows owner access to the approval chain if requested.

PGM partnered with ClickPay payment solutions to enable tenants the ability the log on to a cloud based software to view monthly statements and pay rent. Our management teams utilize Building Engines to catalog and maintain preventative maintenance records building mechanical units.

PGM also provides tenants and customers with a 24 hour 7 days a week emergency maintenance support hotline ensuring the whole team assigned to a property is notified concerning maintenance issues.



### SCALE FOR GROWTH

Reduce inefficiencies such as manual tasks and cut processing costs by up to 60%.



### PAY MORE WAYS

Pay suppliers based on their choice of Mastercard, AvidPay Direct - our enhanced direct deposit method - or AvidPay check.



### ELIMINATE PAPER

Shift to 100% electronic invoices and payments to save time and money with our AP automation solutions.



### GET 24/7 REMOTE ACCESS

Manage your AP process from anywhere with an internet connection to keep your business moving.



### GAIN TOTAL CONTROL

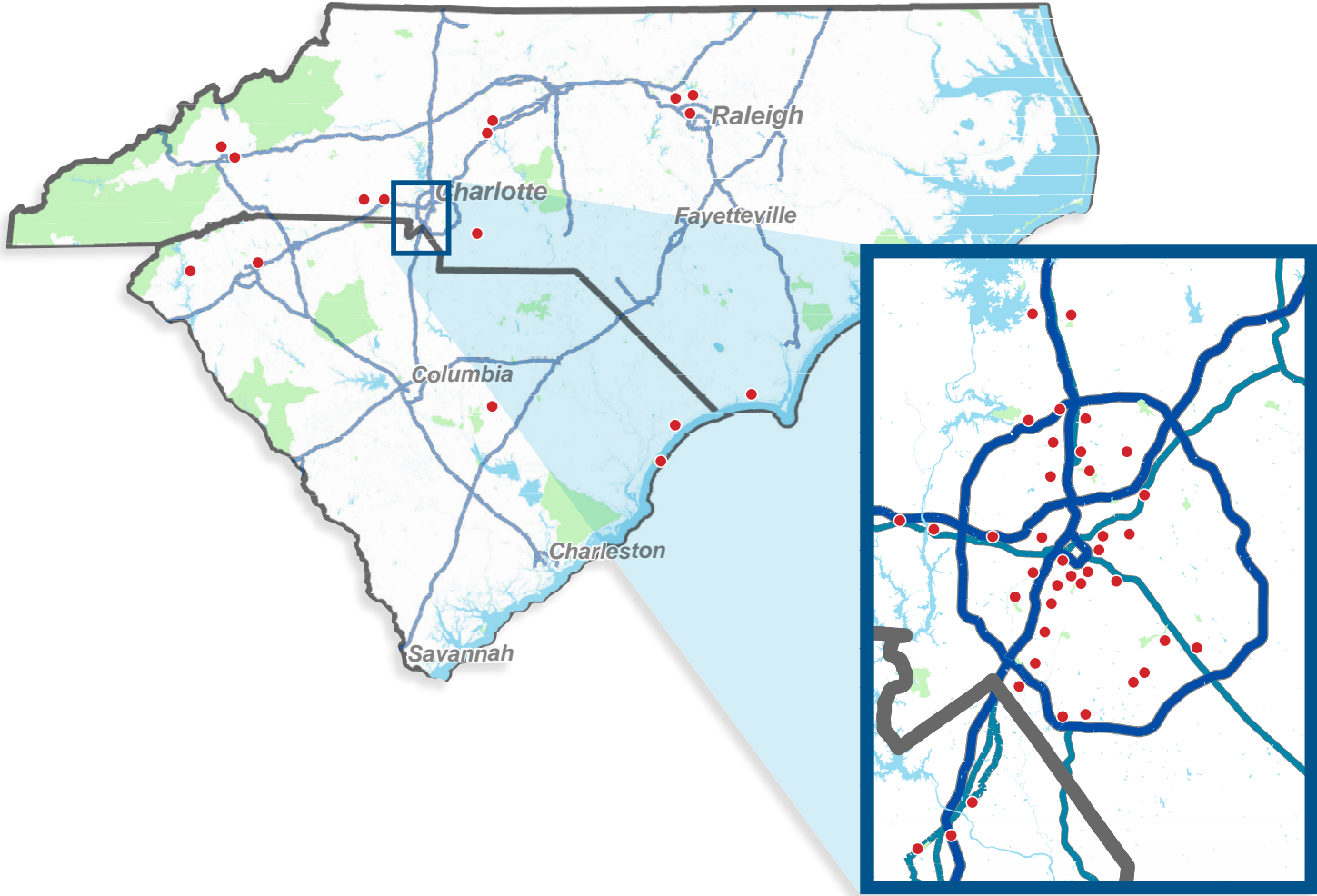
Enforce your existing business rules, set permissions and have access to a complete audit trail from PO to payment.



### SEND FAST, SECURE PAYMENTS

Reduce fraud risk and get your suppliers paid on time with secure and efficiently managed payment solutions.

# OUR CLIENTS' SERVICE LOCATIONS FOR 2025



# KEY REASONS TO SELECT PROVIDENCE GROUP MANAGEMENT



### MARKET EXPERTISE

Providence Group Management currently manages a selection of institutionally and privately owned real estate. Building types include office, flex / industrial, and retail assets.



### DEPTH OF RESOURCES

Our platform enables us to provide our clients quality and specialized management services. We utilize our network of contractors, service vendors, architects, and engineers to best serve our clients objectives for their real estate investment.



### COMMITMENT

Clients find that we are fully committed to servicing their real estate investments as individual clients. An entire team of real estate professionals is assigned to your account to prevent a breakdown of service.



**OVER 3,700,000 SF OF  
PROPERTY CURRENTLY  
UNDER MANAGEMENT  
THROUGHOUT  
THE CAROLINAS**



# MANAGEMENT SERVICES

## PROPERTY MANAGEMENT

Providence Group Management will implement solid management principles and practices that include:

- Prepare monthly reports that include a financial summary, tenants issues, property issues, lease activity, and capital project tracking
- Meet local governing representatives concerning real property matters
- Implement preventative maintenance practices
- Inspect and assure all life safety systems servicing the property are maintained per industry standard and by local code and ordinances
- Track all building mechanical systems
- Maintain and upkeep tenant COI's
- Benchmark property expenses against industry standard
- Forecast capital projects
- Prepare operating budgets
- Hold tenants accountable per lease obligations
- Become a "familiar face" to the tenants and address any issues in a timely manner
- Approve all invoices for the property
- Maintain as-built drawings for individual tenant spaces, MEP of center, and all other construction documents
- Abstract all leases and assure lease compliance
- Maintain and bid out vendor contracts to assure rates are within market averages
- Review insurance policy for landlord, vendor, and tenants
- Coordinate eviction process and other legal matters with client
- Maintain property to a "Class A" appearance
- Attempt to reduce fixed property cost
- Coordinate snow removal with qualified contactor

## ACCOUNTING

PMG utilizes MRI accounting software to manage our Clients' property account(s). Through partnering with Providence Group Management in the management of your real estate investment, our accounting department will provide the following services:

- Monthly financial reports that include an income statement, balance sheet, general ledger, check register, tenant receivable ledger, and aged delinquency report
- Persistent and systematic rent collection from delinquent tenants
- Maintain and manage property trust accounts
- Prepare and maintain lease abstracts
- Maintain vendor W-9's
- Manage accounts payable and receivable
- Properly bill invoices to responsible parties per the lease agreement
- Perform TICAM reconciliation
- Pay all property invoices in a timely manner

## ENERGY MANAGEMENT

Conservation of energy is a key element to reduce the environmental footprint for our client's assets. The market standard NNN lease typically delegates the tenant space as their responsibly. PGM strives to inform tenants of energy saving measures while implementing "Green" management practices for the common area and building systems. These measures include:

- Informing tenants of "best practices" to reduce energy consumption
- Collect appropriate preventive maintenance documents from tenants
- Replace building mechanical systems with energy efficient and environmental friendly systems
- Conduct an energy audit to establish baseline consumption
- Perform an energy analysis to identify areas of potential savings
- Analyze energy analysis and bid out services to upgrade equipment to determine savings and payback time if work is performed
- Remain informed of local utility company rebates upon upgrading energy saving

# MANAGEMENT SERVICES (continued)

## ENGINEERING / CONSTRUCTION MANAGEMENT

While implementation of preventative maintenance can prolong the life of a commercial property, capital items and large scale projects may occur. Upon owners' request, Providence Group Management can handle construction project management providing:

- Contract with a specialist to establish a detailed scope of work to meet owners needs
- Establish a RFP and review bids from reputable contractors
- Maintain an active project schedule and assess any change orders
- Assure project meets all necessary deadlines
- Collect and track all COI documents from contractors and subcontractors
- Hold construction meetings onsite with GC on a routine basis
- Gather O&M manuals upon completion of project
- Oversight of development projects

## GENERAL MAINTENANCE

Providence Group Management will provide the following maintenance for your real estate property:

- 24 hour 7 day a week emergency service
- Maintain all documents associated with maintenance projects
- Routine preventative maintenance inspections
- Arrange annual roof inspections by a qualified vendor
- Competitively bid vendor contracts
- Supervise vendors for compliance with vendor contracts
- Track all warranties for work performed





**THE PROVIDENCE GROUP**  
EXCELLENCE IN RETAIL REAL ESTATE

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