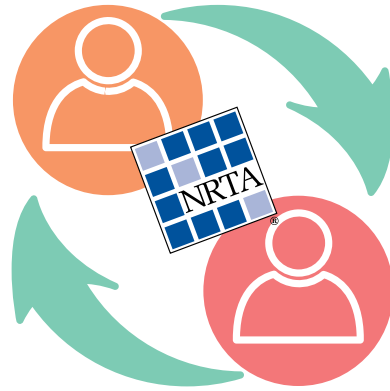


**NRTA's Annual Conference**



# Tenants in Common

Expanding Knowledge 2023



**SEPTEMBER 17-20, 2023**

Fort Lauderdale Marriott Harbor Beach Resort & Spa

**DON'T MISS OUT ON THIS UPCOMING LEARNING EVENT!**

- **44 Class Presentations**
- **22 "Breakout Sessions"**
- **4 Course Level Designations**

*A conference for asset managers, analysts, auditors, administrators, attorneys, paralegals and other commercial real estate professionals responsible for managing commercial property portfolios*





# Our 2023 Curriculum is a Powerhouse of Competency-Based Concepts

## **44 Class Presentations**

Class presentations are facilitated by subject matter experts. Curriculum includes an additional 22 Breakout Sessions. These small group sessions allow for peer-to-peer conversations focused on the designated topic. Participation is typically limited to 25-45 people; a moderator keeps the discussion on target.

## **4 Course Level Designations**

Conference 2023 features a return of the popular four-level education framework: B-Basic/I-Intermediate/A-Advanced/E-Everyone. These designations are offered to help participants select a course best suited to their professional experience and current need to realize success. Course Structure is designed to provide participants with an in-depth review of best practices critical for you AND your company to be successful. Presentations are centered around critical competency-based concepts including: Creating Value by Numbers, Dealing with Change, Legal Lessons, Strategy & Collaboration, and Technology & Innovation.

## **Don't Miss This One-of-a-Kind Tenant Based Learning Event!**

National Real Estate Tenants Association has hand-selected the brightest thought leaders and industry experts to help you stay informed and on top of the trends in your field. Best of all, this curriculum is purposely crafted to Benefit All Commercial Tenants. You can even earn CLE or CPE credits for participating! Get in now and continue your education with our expert-led presentations! Register now to learn from the industry's top subject matter experts.



## **Who needs to attend?**

Real estate management professionals responsible for strategy, management processes and technology.

# HANDS-ON LEARNING

NRTA's Annual Expanding Knowledge Conference offers a truly unique learning opportunity for the tenant community. We are moving forward, adapting – mindful of the latest industry changes, and focused on networking and sharing best practices. The 2023 Tenants In Common Conference consists of valuable course offerings and targeted breakout sessions. This education is geared toward developing talent by sharing today's most effective industry strategies. There is no other professional organization that provides this complete, hands-on real estate lease management training and education for all skill and experience levels.

NRTA's 25+ year trend continues. We remain the premier education resource providing curriculum designed for tenants focused on improving the bottom line.

## REGISTRATION (Online only)

CONFERENCE ATTENDEES	MEMBER	NON-MEMBER
Early Bird (SAVE \$200)	\$1,199	\$1,799
As of 6/16	\$1,399	\$1,999
Note: Any changes after 6/16	\$200.00	\$200.00

Cancellations are non-refundable. Substitutions are permitted.

Course selections may be changed until September 6th.

Don't forget to book your hotel. Scan the QR code or go to: <https://book.passkey.com/event/50517686/owner/4894/home>

Scan to Book  
Your Hotel



## Keynote Speaker:

# Christine Cashen

One of the world's most sought-after business humorists, Christine delivers a fast-paced, uproarious program brimming with memorable quips and relevant content that helps audiences spark new and innovative ideas, manage conflict, reduce stress, energize employees, and create a happier more productive workplace.

Author of the award-winning books, **THE GOOD STUFF: Quips & Tips on Life, Love, Work and Happiness** and **It's YOUR Business: Good Stuff for Your Personal, Professional, and Funny Business**, Christine holds a bachelor's degree in Communication and a master's degree in Adult Education. In 2016, she was the recipient of an honorary doctorate from Central Michigan University.







# CONFERENCE HIGHLIGHTS

## Landlords—Front and Center!



Times are changing - how can we be the catalysts which make things happen? Successful partnerships and collaborations are key ingredients to a successful real estate career. We are excited to host a panel of Landlord experts who will discuss change in this ever evolving real estate world. Is there a question that you have asked, but never received a response? Take advantage of this can't miss opportunity to ask and get answers! Hear directly from our guest landlords and get an insider's perspective. Witness the metamorphosis of partnership and collaboration!



## NEW Peer-to-Peer We take this VERY seriously.

NRTA will host an all-new, full-day Networking Suite for ALL conference participants. This suite offers a comfortable, semi-private setting for professional networking chats. This space is open to everyone and perfect for impromptu meetings with your peers.



## Community Involvement A tradition.

NRTA Conference participants are invited to help us celebrate a "give back" community event on behalf of the Broward County Boys & Girls Clubs. Our volunteers will spend Sunday morning working side-by-side with club members helping to spruce up club facilities.



## Oceanfront Party

Enjoy this ocean-side resort at its best Tuesday night! Network with your peers in a casual atmosphere. Buffet meal. DJ. Music and dancing. Enjoy the stunning view overlooking the Fort Lauderdale beach. Cash bar.

## **HOT TOPICS** you can expect to hear over and over!

- *Living in this new Lease Accounting Standard world.*
- *How's your mixed-use life going?*
- *Sustainability—doing more with less; we need to talk!*
- *ESG regulations and you.*
- *Anybody dealing with Excess Space? Are you kidding?*
- *Trying to terminate that lease? How's that negotiation going?*

# WHAT'S IN IT FOR YOU?

## Proven ROI

Training is an investment! There is proven, quantifiable value associated with attending our Expanding Knowledge conferences. This expert education provides multifold benefits on both an immediate and ongoing basis.

## Key Learning Strategies

Even since our 2022 Conference, so much has changed! Get up to speed and grow your talent by learning the latest about: Strategy and Collaboration, Technology and Innovation, Legal Lessons, Creating Value by the Numbers, and Dealing with Change. The integration of these lease management disciplines makes this a **one of a kind conference tenants must attend**.

## Diverse Courses

Classes cover a range of real estate lease management courses and lease administration training for retail, commercial, office, industrial or healthcare service occupiers, and are suited for industry newcomers and seasoned veterans alike.

## Breakout Sessions

Highly interactive, moderated sessions that are focused on a single topic and typically limited to smaller groups. You're encouraged to bring real-life examples of challenges you're dealing with and pursue solutions through peer-to-peer discussion and networking.

## Networking

Limitless opportunities for informal networking with industry peers and leaders are a built-in function of the conference experience.

## Community Events

Volunteer activities which give back to our host community have become a conference favorite. These events typically happen as part of the conference's Sunday kickoff. They're also great ways to network.

## Trade Show

Our annual Trade Show features some of the best software technology, tax consultants, lease auditors, and lease administration service available to the real estate lease management industry. The show is low-key, encouraging meaningful interaction and information-sharing.

## Discount Registration Savings

Take advantage of the significant discount by registering early. Save \$200!

**Become an NRTA member and SAVE \$600!**



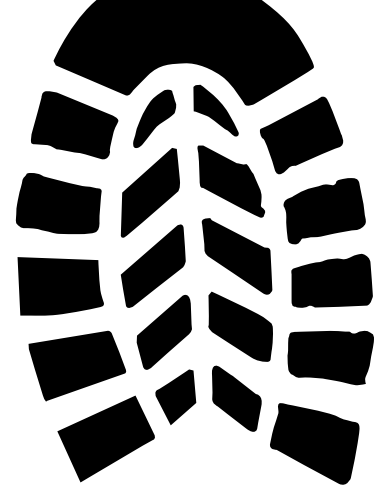
# NEW! NRTA BOOTCAMPS 2023

**NO PAIN NO GAIN – HEADS DOWN & TRAIN**

**Occupancy Expense Bootcamps** – Five important areas of concentration are offered within the **NEW Bootcamp Experience**. Participants will review appropriate lease requirements and expected costs concerning **CAM, Real Estate Taxes, and Insurance**. In addition, related proficiency training will be offered in basic **Excel** and **PowerPoint** – skills necessary for practitioners to be successful within these areas.

Choose one BOOTCAMP or register for all FIVE! Taught by industry experts, participants will learn the correct industry terminology and train with real world examples.

CHECK OUT **CVN-8, CAM Bootcamp, CVN-10, Real Estate Tax Bootcamp, CVN-19, Insurance Bootcamp, T&I-3, Excel Training 2019 Bootcamp, and T&I-4, Powerpoint 2019 Bootcamp** for full course descriptions.



## NEED MORE GREAT REASONS TO ATTEND? NEED TO CONVINCE YOUR LEADERSHIP?



Click to Watch



**NRTA Education was the cornerstone for my success...**

*“The NRTA Conference is really for anyone that has a lease and is a tenant in any type of setting.”*

– **Jessica Mihm**

Director of Lease Administration,  
The Buckle, Inc.



**NRTA is a good investment in your people...**

*“The people at NRTA helped guide me through my first years at Panda Restaurant.”*

– **Pernell Agdeppa**,

Executive Director, Real Estate Legal,  
Panda Restaurant Group

Click to Watch



**NRTA is ideal for ALL Tenants...**

*“What’s important is that we are addressing topics that are impactful to our membership today.”*

– **Caleb Smith**

Senior Director,  
New Store Development & Enterprise Real Estate,  
Bridgestone

Click to Watch



# CONFERENCE AGENDA

Sept. 17-20, 2023

Sunday

- 3:00-7:00 Registration
- 4:00-5:00 First Time Attendee Orientation
- 3:30-7:30 Trade Show
- 5:00-7:30 Welcome Reception

Monday

- 7:30-9:00 Breakfast & Opening Remarks – *Sponsored by Jackson Cross Partners*
- 9:00-10:00 Session I – General Session with Keynote Speaker Christine Cashen – *Sponsored by Fischer Solutions*
- 10:30-11:30 Session II  
CVN-8 CVN-4 CVN-20 CVN-17 DWC-1 LL-2 S&C-4 S&C-12 S&C-14
- 11:30-1:00 Lunch – *Sponsored by RE BackOffice, Inc.*
- 1:00-2:00 Session III  
CVN-13 CVN-11 CVN-1 CVN-3 S&C-19 S&C-10 LL-1 T&I-3 S&C-13 DWC-6
- 2:30-3:30 Session IV  
DWC-2 LL-8 CVN-12 LL-4 CVN-19 S&C-18 S&C-6 T&I-4 CVN-21
- 3:30-7:30 Trade Show
- 5:00-7:30 Reception

Tuesday

- 7:30-9:00 Breakfast – *Sponsored by Lease Administration Solutions, LLC*
- 9:00-10:00 Session V  
CVN-9 DWC-8 CVN-7 S&C-3 S&C-7 DWC-4 DWC-5 S&C-16 LL-7 CVN-24
- 10:30-11:30 Session VI  
CVN-14 DWC-9 LL-6 CVN-16 LL-3 CVN-18 S&C-2 DWC-7 S&C-17
- 11:30-1:00 Lunch; NRTA Excellence Award – *Sponsored by Innovating Commerce Serving Communities (ICSC)*
- 1:00-2:00 Session VII  
CVN-10 DWC-10 S&C-1 S&C-5 CVN-2 LL-5 T&I-1 CVN-23 DWC-3 S&C-15
- 2:30-3:30 Session VIII  
CVN-15 LL-9 CVN-22 S&C-9 S&C-11 S&C-8 T&I-2 CVN-6 CVN-5
- 6:00-10:00 Dinner – Peer-to-Peer Networking – *Sponsored by Mohr Partners*

Wednesday

- 7:30-9:00 Breakfast
- 9:00-11:00 Session IX – Closing Session: Landlord Panel Discussion

*Monday break sponsored by DR Lease Consulting, LLC*

*Tuesday break sponsored by Commercial Insurance Associates, LLC*

*Monday & Tuesday Networking Suite sponsored by Commercial Asset Preservation, LLC*



### CVN-1, International Lease Administration (I)

**Monday: 1:00-2:00**

Commercial tenants face continued challenges managing their portfolios while expanding overseas. By sharing personal stories, challenges, and best practices major tenants with lease compliance experience in over 43 countries will showcase skills gained while expanding into international markets.

This highly interactive **intermediate** course offers attendees the opportunity to discuss international expansion of the lease administration role.

### CVN-2, Understanding Currency Impacts of Global Leases (A)

**Tuesday: 1:00-2:00**

Have you asked yourself why a lease obligation currency is defined as one currency, but the lease requires payment in a different currency? Do you understand the four (4) currencies involved in International Lease Transactions? Come to this session and learn how currency is impacting your leases, payments, and your company's P&L.

You will add value to your organization by confidently educating your deal makers and leaders on currency impacts while helping to mitigate overall risk in your company's portfolio. This is an **advanced** interactive session and a follow-up session to International Lease Administration.

### CVN-3, Understanding and Auditing Overcharges for Commercial Office Tenants (B)

**Monday 1:00-2:00**

This class will walk through the basics of the lease auditing process for Commercial Office Operating Expenses. This **basic** class will also review the types of expenses unique to office leases and how to audit the "base year" and "gross-up" clauses, including its pitfalls. We will also talk briefly about the Load Factor and how it affects tenant's costs in the lease. Lastly, this class will identify several areas of possible landlord overcharges that may appear in a (true-up) Reconciliation Statement, helping tenants to reduce their operating expense costs.

Class Objectives:

- Understand the lease auditing process for Operating Expenses in an office lease.
- Understand how to audit the Base Years and Gross-ups.
- Identify specific overcharges in Operating expenses that you may be paying.

### CVN-4, Reviewing Gross Ups and Base Years (B)

**Monday: 10:30-11:30**

Who loves Gross Ups? Who benefits from a Base Year? Who even understands these provisions and their calculations? In this **basic** level course, we will discuss why these provisions are used in leases and how they can either save or crush tenants. The learning objectives are:

- Understand why certain leases utilize or exclude Base Years/Gross Up
- Learn the basic calculation for a Gross Up and when they are used
- Gain an overview of how Landlords abuse Base Year and Gross Up provisions
- Visualize how gross up provisions used in retail leases
- Understand what Tenants and organizations should do to negotiate better Base Year and Gross Up provisions to reduce risk and improve their bottom line

### CVN-5, Breakout - Lease Accounting, Diving into Equipment and Other Imbedded Leases (A)

**Tuesday: 2:30-3:30**

### CVN-6, Breakout – Understanding REA and OEA Agreements and how they affect your cost (A)

**Tuesday: 2:30-3:30**

### CVN-7, Breakout – International Lease Administration (breakout from CVN-1) (A)

**Tuesday: 9:00-10:00**

### CVN-8, "CAM Bootcamp" – No Pain No Gain; Heads Down and Train (B)

**Monday: 10:30-11:30**

**NEW!**

Want to learn how to raise your rank and save your company money by becoming a CAM "Hero"? This is the course for you! This **basic** course is intended to help newer auditors become more comfortable doing CAM Reconciliations and "desktop" audits, discussing the basic concepts involved and how to review them.

The course will cover the basic components of a CAM reconciliation and the lease language related to them, how to calculate pro rata share, CAM caps, management and administrative charges, current industry issues related to CAM reconciliations and best practices to MAXIMIZE savings!

We welcome seasoned auditors to join us for new insights and discussions. Join us to see how your peers have navigated the latest war on Landlord overcharges. This session will be followed by a Breakout Session for further questions and discussion.

### CVN-9, Lease Audit and Cotenancy Workshop (B)

**Tuesday: 9:00-10:00**

Geared toward professionals new to the world of Lease audit. The Workshop course will focus on Cotenancy, Lease Verbiage, and Desktop Audit Techniques. This **basic** class is designed for beginning to intermediate auditors who manage or participate in the desktop audit function. Presenters will discuss techniques and insights for understanding the development of prorata share ratios and cotenancy review, presentation, and resolution. This interactive session will include hands-on examples designed to help improve attendees' understanding of the materials presented.

### CVN-10, "Real Estate Tax Bootcamp" – No Pain No Gain; Heads Down and Train(B)

**Tuesday: 1:00-2:00**

**NEW!**

It's your duty to arm yourself with knowledge and serve your company! This **basic** course will help explore the review of real estate tax reimbursement invoices received from landlords from a "trainee" perspective.

Tenants may overlook real estate tax savings because they view governmental real estate tax bills as non-negotiable or perceive leases as onerous. Various topics will be deployed to interconnect the invoice, lease, and third-party support allowing tenants to soldier through, correct billings and reduce real estate tax reimbursements to landlords. The presenters will attack various year end reconciliations with tips and techniques to demonstrate how to keep your tax savings from going MIA!

### CVN-11, Peer-to-Peer Lease Audit Hypotheticals (E)

**Monday: 1:00-2:00**

The shopping center world is in an accelerated state of change in tenancy. We are seeing shopping centers which were once predominately retail in nature, being converted into mixed-use projects, adding residential, hotel, entertainment and office components. During this interactive peer-to-peer session, we will take a deep dive into lease auditing and will discuss several hypothetical fact patterns that arise in connection with how Tenants need to audit their lease provisions for Cotenancy, Character of Shopping Center, Common Area Maintenance and Real Estate Taxes in this ever-changing environment. Together you will identify issues, strategies and propose solutions discovered through peer-to-peer sharing of expertise and experience. Whether you sit on the audit side of the business or draft leases, it's important to understand – from the start – how this evolution can impact a Landlord's billing, and most importantly, your Company's bottom line!



**CVN-12, International Lease Audit (A)**  
**Monday: 2:30-3:30**

In this **advanced** course two presenters will share their experiences and discuss some of the key differences between the approach to Lease Auditing in US and European Markets, with a primary focus on CAM but also reviewing other Lease Expenses. Having encountered a series of challenges, the presenters will explain how they have tackled those difficulties and achieved significant success across various territories. Finally, there will be a 10-point plan of key considerations when putting together a plan for International Lease Auditing, either for a single site or a larger portfolio.

**CVN-13, Breakout – “CAM Bootcamp” follow-up (B)**  
**Monday: 1:00-2:00**

**CVN-14, Breakout – Lease Audit and Cotenancy Workshop follow-up (B)**  
**Tuesday: 10:30-11:30**

**CVN-15, Breakout – “Real Estate Bootcamp” follow-up (B)**  
**Tuesday: 2:30-3:30**

**CVN-16, Breakout – CAM Issues: standalone/shopping center/mall/lifestyle (E)**  
**Tuesday: 10:30-11:30**

**CVN-17, Navigating the Utility Energy Landscape (I)**  
**Monday: 10:30-11:30**

An immersive Deep Dive into Understanding Utility Rates and Energy Management Strategies.

This **intermediate** course will equip participants with the knowledge of managing utility costs effectively, and practical skills that can be introduced unto their organization. Designed for both tenants and landlords, this course offers a step-by-step approach to understanding and tracking utility usage and costs, as well as utility bill auditing.

Through real-word case studies, and hands-on exercises, participants will learn how to identify the different line items on their utility bills and how to interpret them. They will also explore various strategies to reduce utility costs, such as implementing energy-saving measures and taking advantage of rebates and tax credits.

In addition, the course provides an overview of utility rate structures, electric supply, and transport gas options in deregulated states. Participants will learn how to conduct a utility bill audit on their facilities to identify potential overages and hidden costs, and how to create a cost recovery program within their organization.

By the end of the course, participants will have a better understanding of the utility bill markets and be able to manage their utility

bills confidently and effectively, uncovering lost profits and contributing to a sustainable future.

**CVN-18, Cotenancy (I)**  
**Tuesday: 10:30-11:30**

This **intermediate** course provides a foundation and framework to understand cotenancy provisions (i.e., clauses conditioning the tenant’s opening for business or requiring a tenant’s continued operation at the designated premises). It will address a tenant’s rationale for seeking such provisions such as achieving a critical mass of tenants in a shopping center and requiring satisfactory levels of overall occupancy as well as some common landlord arguments for opposing such provisions. It will also cover tenant remedies in the event a landlord violates its cotenancy requirements and how tenants may seek to enforce those remedies.

**CVN-19, “Insurance Bootcamp” – No Pain No Gain; Heads Down and Train (B)**  
**Monday 2:30-3:30**

**NEW!**  
Is your lease leaving you open to attack? Is your lease offering more support than necessary? Understanding your commitments to your landlord can help preserve your defense budget. This **basic** course will familiarize you with coverage and industry terms to help you determine what you should and should not be reimbursing for your landlord’s coverage.

Learn how to call in air support using the correct industry terminology, experience the proper basic training of real-world coverage examples, and gather intel on appropriate lease requirements and expected costs. You will also be thoroughly briefed on the state of the hardening market driving the premium costs and how long this cold war is expected to last.

**CVN-20, Lease Accounting Reboot – We Still Have Questions! (E)**  
**Monday: 10:30-11:30**

Applying the accounting rules to our “real life” lease portfolios certainly has its challenges. In this class we will discuss the things we did not know on day one, and perhaps circumstances which were not contemplated including Rent Impairments, Rent Review, Modification Accounting and Discount Rate exceptions. Bring your questions so we can all discuss situations we have experienced and share insight.

**CVN-21, Breakout – Utility Management (I)**  
**Monday: 2:30-3:30**

**CVN-22, Breakout – Cotenancy (A)**  
**Tuesday: 2:30-3:30**

**CVN-23, Breakout – Maintenance and Repairs – Now What? (I)**  
**Tuesday: 1:00-2:00**

**CVN-24, Breakout – Lease Auditing – Is It Right for Your Company? (E)**  
**Tuesday: 9:00-10:00**



**Dealing With Change (DWC)**

**DWC-1, Revenue and Sublease Management (I)**  
**Monday: 10:30-11:30**

Vacancies are more and more common, and tenants are being forced to sublet some of these locations to mitigate their lease liability.

This **intermediate** course will help those responsible for lease administration to organize and manage subtenant leases, looking at a variety of issues from collecting rent to property turnover.

Topics covered will include, how to switch hats from being a tenant to being a landlord daily, sublease provisions needed to protect the interests and minimize future headaches, subtenant maintenance and repairs and subtenant delinquencies.

**DWC-2, Real Estate Lease Administration Operation Models (A)**  
**Monday: 2:30-3:30**

This highly interactive **advanced** course will discuss the growing trend toward integrating external consultants and third-party service providers with in-house teams to optimize expertise and efficiency.

The lease administration role continues to expand due to industry changes and the importance of the lease administration team is often overlooked. This class will explore the different types of lease administration operation models including fully in-house, hybrid and fully outsourced models, the pros and cons of each and discussion around there is no “one-size” fits all model.

**DWC-3, Breakout – Office Lease Administration Outsourcing (Continuation of DWC-2) (A)**  
**Tuesday: 1:00-2:00**

**DWC-4 – Sustainability & Decarbonization: Getting to Net Zero (I)**  
**Tuesday: 9:00-10:00**

Your business has committed to going carbon neutral – now what? In this **intermediate** course, an expert in energy and sustainability will walk through the practicalities of reaching sustainability goals, including distinguishing between net neutral and decarbonization, discussing the challenges of going green, and walking through steps a company can take to increase sustainability.

## DWC-5, Mixed Use Developments – Panel Discussion (I)

**Tuesday: 9:00-10:00**

As consumers' expectations and needs change so does the thinking on how real estate can be utilized to provide a great customer experience. It's no secret that, over the past many years, mixed use developments have emerged as, often, pedestrian-friendly developments that blend two or more residential, retail, office, commercial, cultural, institutional, and/or industrial uses. While mixed use developments often create fun and engaging experiences, they can often create new challenges for the companies that occupy space within them.

For this **intermediate** panel discussion, Caleb Smith, Sr. Director, New Store Development and Enterprise Real Estate for Bridgestone Americas will be hosting a panel of real estate experts to discuss the nuances of occupying space in a mixed-use development. Here's a twist though...each panelist will have a unique point of view. Whether informed by their legal career or experience gained within a portfolio management / lease administration department for a large user of space, the panel will share their insights on occupying space in a mixed-use development.

## DWC-6, Breakout – Remote Working... How to Survive, Thrive, and Lead (A)

**Monday: 1:00-2:00**

## DWC-7, Breakout – Mixed Use Developments (A)

**Tuesday: 10:30-11:30**

## DWC-8, Driving Productivity, Part 1 (E)

**Tuesday: 9:00-10:00**

How do you tackle your team's never ending to-do-list? In this workshop you'll learn a technique for prioritizing work that will help you determine what to do now, plan for later or delegate to someone else. Additionally, you'll learn key skills for effective delegation and follow-up that empower your team to take the lead on their part of the work and keep everyone on track. Skills development: prioritization, delegation, project oversight, effective follow-up. **Part 1: Prioritization and delegation.**

## DWC-9, Driving Productivity, Part 2 (E)

**Tuesday: 10:30-11:30**

How do you tackle your team's never ending to-do-list? In this workshop you'll learn a technique for prioritizing work that will help you determine what to do now, plan for later or delegate to someone else. Additionally, you'll learn key skills for effective delegation and follow-up that empower your team to take the lead on their part of the work and keep everyone on track. Skills development: prioritization, delegation, project oversight, effective follow-up. **Part 2: Project/work oversight, communication, follow-up.**

## DWC-10, Breakout – Exclusives and Prohibitive Uses – Peer-to-Peer (A)

**Tuesday: 1:00-2:00**



## Legal Lessons (LL)

### LL-1, Basics of the Commercial Lease (B)

**Monday: 1:00-2:00**

This **basic** presentation, geared towards non lawyers as well as lawyers new to the profession, will explore the key legal concepts found in the commercial lease. Attendees will learn the practical implications of these legal concepts and the "competing interests" driving negotiations between landlords and tenants in the selected lease provisions.

### LL-2, Updates in Real Estate Law (I)

**Monday: 10:30-11:30**

Real estate attorneys will explain recent developments in real estate law as it relates to retailers. They will identify key takeaways and trends emerging from the most notable cases over the last year, with an emphasis on best practices and tips for negotiations, administration, and conflict resolution. This **intermediate** course is for attorneys, paralegals and others familiar with legal concepts related to real estate law.

### LL-3, Legal Ethics: Supervision of the non-attorney professional (E)

**Tuesday: 10:30-11:30**

What are the rules regarding paralegals and other non-attorney professionals? This interactive session will explore what is and isn't allowed under current ABA Rules as well as discussing how to avoid traps and other pitfalls in your practice.

### LL-4, Operating Costs and the Law (B)

**Monday: 2:30-3:30**

Senior attorneys will discuss developments in the law governing how landlords charge tenants for lease expenses and how to identify areas where tenants are commonly overcharged. In addition, the presenters will discuss best practices for lease negotiations and dispute resolution when conflicts arise. This **basic** course is intended to provoke questions and comments. Discussion will focus on the principles of law that govern parties to the triple net lease, lease interpretation, the right to audit, the application of the law from the administrative perspective, and ways to overcome landlord objections.

### LL-5, Office, Industrial and Warehouse Leasing (I)

**Tuesday: 1:00-2:00**

This **intermediate** course will discuss how leasing issues and concerns vary in office, warehouse and industrial leasing. Topics to be addressed include environmental concerns, operating expenses, and repair/maintenance obligations.

## LL-6, Estoppels & SNDAs (B)

**Tuesday: 10:30-11:30**

This **basic** course will help anyone involved in lease management and compliance gain an understanding of what lenders, landlords, and tenants are trying to achieve with SNDA and Estoppel documents. The program will address their preparation, review, negotiation, and execution. Real world examples will be provided to demonstrate the due diligence process needed prior to execution, as well as how to avoid inadvertent agreements that arguably modify a lease or impact title.

## LL-7, Breakout - Lease Disputes and Resolutions (I)

**Tuesday: 9:00-10:00**

## LL-8, Breakout – Premises Sustainability & Decarbonization (A)

**Monday: 2:30-3:30**

## LL-9, ESG & Commercial Tenants | What is it, and what does it mean for Tenants? (A)

**Tuesday: 2:30-3:30**

You're seeing ESG headlines everywhere, but what does this acronym mean for commercial real estate tenants? In this **advanced** session, we'll cover:

- Environmental, Social, & Governance ("ESG") as an investment risk assessment approach, how its meaning has expanded, and what it means today.
- Who's asking? Regulators, investors, capital providers, landlords – let's discuss.
- Differences and overlap between ESG and your sustainability and inclusion initiatives.
- ESG reporting frameworks overview. We'll get familiar with the "alphabet soup" of reporting options.
- ESG legal landscape update. Has the SEC released its climate reporting rule yet? Who's being sued over ESG matters?

Bring your questions!



## Strategy & Collaboration (S&C)

### S&C-1, Defending Against Poor Audit Rights and Restrictions (I)

**Tuesday: 1:00-2:00**

As we move through the ever changing commercial real estate environment, both landlords and tenants are feeling the economic squeeze. As tenants scrutinize their occupancy cost for overcharges, landlords are fighting harder than ever to avoid requests to support billed expenses and lease audits. This **intermediate** class explores the types of landlord defenses, audit restrictions, and tactics commonly used to delay and deflect tenant requests, as well as discusses the applicable laws and options that are available to respond to such defenses.



## S&C-2, The Changing Real Estate Landscape and What it Means to you! (E)

**Tuesday: 10:30-11:30**

As the commercial real estate industry contends with the changing landscape of the post-pandemic world, knowing how to develop a precise road map with the right data and tools is key to determining where we go from here. Meet with Mohr Partners' Chief Commercial Officer Misti Meggs as she provides unparalleled industry insight and proven best practices for retail, office, and industrial real estate. Misti will leverage her extensive experience to illustrate the impact of technology and the pandemic on the real estate market and how different factors like e-commerce, globalization and automation affect market rents and supplies.

## S&C-3, "Optimization Through Collaboration" – Building a Bridge Between Departments (E)

**Tuesday: 9:00-10:00**

Want to learn how to work together with other teams to become more efficient? This is the course for you! This panel discussion is intended for everyone in order to bring all aspects of your company together to develop processes to help each other and therefore MAXIMIZE savings!

Join seasoned veterans from Legal, Lease Administration, Lease Accounting, Auditing, Real Estate, and Deal-Making who will share their experiences and ideas to help you bridge the gap between departments to collaborate and become "Tenant's In Common".

Please bring your questions and ideas to join the conversation with our panel.

## S&C-4, Condemnation, Easements & Rights of Way for the Real Estate Administrator (I)

**Monday 10:30-11:30**

This engaging and informative panel discussion will provide insights regarding governmental takings and easement requests. Facilitated by a subject matter expert in the eminent domain and condemnation process, a panel of your peers from the real estate industry will explore challenges and best practices for navigating these intricate proceedings. This **intermediate** course will equip real estate administrators and managers with practical tips to mitigate risk and maximize value for your organization.

## S&C-5, Sale Leasebacks & Lease Buybacks: What, Why, and How? (I)

**Tuesday: 1:00-2:00**

This **intermediate** course will cover what it means for a corporation to sell and lease their building back from a landlord, why corporations consider sale leaseback transactions, and how a property owner can maximize their sales price while minimizing their occupancy costs when executing a sale leaseback. The course will also feature an overview

on the lease buyback, a growing trend amongst corporations that favor ownership over tenancy.

## S&C-6, Driving Bottom-Line Value with Lease Renewals (A)

**Monday: 2:30-3:30**

This **advanced** course provides an in-depth analysis of lease renewals and walks participants through the life cycle of a lease renewal transaction, including due diligence, negotiation, and closing the deal. Participants will learn useful tactics and strategies to help drive maximum bottom-line value, including:

- Analyzing the market to identify opportunities and potential challenges
- Conducting a thorough review of the lease and identifying areas for negotiation
- Developing negotiation strategies and techniques to achieve favorable lease terms
- Understanding the landlord's perspective and negotiating from a position of strength
- Identifying and leveraging tenant improvements and other concessions to drive value
- Managing the lease renewal process from start to finish, including documentation and closing the deal

By the end of the course, participants will have a deep understanding of the lease renewal process and the tools and techniques needed to drive maximum bottom-line value for their company.

## S&C-7, A Dive Into Industrial Real Estate Strategy (I)

**Tuesday: 9:00-10:00**

As a follow up to the well-received "Introduction to Industrial Real Estate" course shared at the 2022 NRTA conference in Phoenix, AZ, this **intermediate** level session will take a deeper dive into the key elements of Industrial Real Estate strategy. In this session, JLL's Executive Managing Director, Dan McGillicuddy, will provide expert commentary on how to think about logistic network strategy, evaluating trade-offs to reduce cost, site selection considerations for manufacturing / distribution, and understanding third-party logistic (3PL) outsourcing.

## S&C-8, Real Estate Valuation and Appraisal (B)

**Tuesday 2:30-3:30**

This **basic** level course being presented by experts in the field of appraising and valuing retail real estate will equip attendees with the knowledge and methodology behind appraising retail real estate and how that information can help their organization be more informed stewards of their portfolio of properties. This course will explore:

- When and why appraisals make a difference?
- The three approaches to valuing real estate
- Evaluating tax matters / potential protests
- Considerations when faced with eminent domain / condemnation

## S&C-9, Nuts and Bolts of Build-To-Suit New Store Development (I)

**Tuesday: 2:30-3:30**

New store growth has long been a strategic priority for organizations looking to grow their top line, sustain same store sales comp, drive earnings, and expand market share. The menu of new store growth options varies based on an organization's go-to-market strategy: in-line space, mall space, freestanding buildings, etc... For organizations that pursue freestanding buildings, a build-to-suit development program has been a popular and effective approach to opening new stores.

As a strategic development partner to many national retailers, in this **intermediate** level session, the Zaremba Group's, Matt Casey, will breakdown the nuts and bolts of a build-to-suit program including site selection / market analysis, program development, construction management, and more!

## S&C-10: Maximizing Your Broker Network to Reduce Occupancy Costs (B)

**Monday: 1:00-2:00**

This **basic** session will educate lease administrators on how to leverage your business' broker relationship to obtain the lease language that will create value and reduce costs. We've joined a seasoned broker with an experienced lease administrator and auditor to walk us through what to be mindful of when negotiating a new lease from an occupancy cost perspective, how the parties can strategize for the best outcome, and how the broker will ultimately get those terms into the lease.

## S&C-11, Breaking Barriers – Driving Negotiation and Settlement (A)

**Tuesday: 2:30-3:30**

Attendees will experience firsthand the varying dynamics and interaction between two seasoned professionals from the Landlord and Tenant side of the business who have successfully negotiated and settled disputes. The objective of this **advanced** session is to provide attendees with a better understanding of how the following play a role in negotiations and their final outcome: A) The dispute ( the amount, length, type, etc.) B) How a company's goals, financial planning and objectives factor into negotiations C) The overall relationship of the parties and overlapping interests D) Preparation and E) Important factors which can assist parties in negotiations and accelerating a settlement.

Attendees are encouraged to share their own experiences and contribute to what is anticipated to be an extremely lively discussion.

## S&C-12, Communication Skills, Part 1 (E)

Monday: 10:30-11:30

What are the core communication skills that can help you be more effective in any situation? Everything we do requires communication – with clients, with colleagues, bosses, our families. Explore and practice communication skills that help in any situation. Skill development: asking questions, listening, framing, body language. **Part 1: Overview, asking questions, and listening.**

## S&C-13, Communication Skills, Part 2 (E)

Monday: 1:00-2:00

What are the core communication skills that can help you be more effective in any situation? Everything we do requires communication – with clients, with colleagues, bosses, our families. Explore and practice communication skills that help in any situation. Skill development: asking questions, listening, framing, body language. **Part 2: Body language and framing/reframing.**

## S&C-14, Breakout - Best in Class Provisions Office Tenants (E)

Monday: 10:30-11:30

## S&C-15, Breakout - Best in Class Provisions In-Line Tenants (E)

Tuesday: 1:00-2:00

## S&C-16, Breakout - Best in Class Provisions QSR Tenants (E)

Tuesday: 9:00-10:00

## S&C-17, Breakout – Franchisees What You Need to Know (E)

Tuesday: 10:30-11:30

## S&C-18, Drafting Effective Demand and Response Letters (I)

Monday: 2:30-3:30

Collaborate with industry veterans to review best practices in drafting dispute letters and responses to default notices that generate results! This **intermediate** workshop will focus on preparing an organized letter which incorporates the “must have” inclusions and recommended exclusions to compel landlord response and cooperation. Participants will be encouraged to email letters prior to the conference (details will be provided after course registration!) for review and discussion during the session.

## S&C-19, Tenants’ Leverage and Advantage in Leases (B)

Monday: 1:00-2:00

The long-held belief that Landlords hold all the cards is wrong. Tenants have significantly more leverage and power than the real estate

industry wants you to believe. In this **basic** level course, our aim will be to answer:

- Who is convincing Tenants that they have no power?
- What are Tenants’ advantages in their leases?
- Where can more leverage be created for Tenant?
- When can Tenants most effectively exercise their leverage?
- Why wouldn’t a Tenant flex their leverage?



## Technology & Innovation (T&I)

### T&I-1 – Digital & Cyber Security in the Workplace (E)

Tuesday: 1:00-2:00

This course will bring awareness to the digital risks that exist in today’s workplace and will instruct attendees on how their businesses can mitigate those risks in an effort to protect against data breaches and other cyber-attacks. Throughout this presentation, members of the FBI’s Cyber team will explore:

- Today’s dangers: what the risks are and where they exist in today’s digital environment
- Standard business practices for securing data and reducing risk of attack
- Considerations for businesses to prepare an incident response and disaster recovery plans
- What happens when an incident occurs
- Time will be allowed for a Q&A session as well

### T&I-2, Breakout - Let’s Talk About our Real Estate Software (E)

Tuesday: 2:30-3:30

### T&I-3, “Excel Training 2019 Bootcamp” No Pain No Gain; Heads Down and Train (B)

Monday: 1:00-2:00

**NEW!**

This **basic** course will help you sharpen your skill set for the most popular spreadsheet software used in business all over the world. You will be receiving hands-on training in calculation, analysis, and visual data representation. Remember to bring a fully charged laptop to this small group training session.

### T&I-4, “PowerPoint Training 2019 Bootcamp” No Pain No Gain; Heads Down and Train (B)

Monday: 2:30-3:30

**NEW!**

In this **basic** course, you will use PowerPoint 2019 to begin creating engaging, dynamic multimedia presentations. Remember to bring a fully charged laptop to this small group training session.



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