

# MONTAGU EVANS PRESENTS... OUR APPROACH TO COUNCIL INVESTMENTS.



## LOCAL AUTHORITY DECISION

to include commercial property investment in their commercialisation strategy and capital plan.

## PROCUREMENT

of a suitably qualified advisor.

## MONTAGU EVANS APPOINTED

## STRATEGY WORKSHOPS

with Members and Officers

### 1<sup>ST</sup> WORKSHOP

- Risks
- Objectives
- Benchmarks

### 2<sup>ND</sup> WORKSHOP

- The Property Market
- Asset Classes
- Returns and KPIs

### 3<sup>RD</sup> WORKSHOP

- Resources
- Governance
- Long Term Asset Plans
- Strategy Formulation

## PROCESS

### BIDDING AND AGREE HEADS OF TERMS

with Investment Board authorisation via delegated authority from Full Council.

### DETAILED REPORT TO INVESTMENT BOARD

### INITIAL GO/NO-GO

### COMPLIANCE AND CONFLICT CHECK

against investment mandate.

### SOURCE PROPERTIES

in compliance with adopted strategy.

### FORMAL SET UP AND CONSTITUTION

of strategy and governance via Full Council or formally delegated sub-group.

### DUE DILIGENCE

following successful bid in conjunction with legal team and third party surveyors, financial advisors and other appropriate advice.

### INDEPENDENT VALUATION

compliant with the RICS Red Book from a third party valuer.

### PRE-EXCHANGE REVIEW COUNCIL

in receipt of reports, option to opt out.

### COMPLETION

and asset under management.

### PERFORMANCE AND REPORTING

### ACTIVE PORTFOLIO MANAGEMENT AND FORWARD PLANNING



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