



# Investment Strategy and Acquisition Criteria

## **INVESTMENT STRATEGY**

Whelan Associates, LLC has built a record of success through superior industry insight resulting from business longevity, a diligent work ethic and precise execution of a well formulated and disciplined investment strategy. Whelan's seasoned team of real estate professionals rely on sound fundamental analysis and attention to details when formulating and implementing this strategy.

## **ACQUISITION CRITERIA**

**Preferred Profile** - Value-Add and Opportunistic assets that are well located and uniquely positioned for near term rent growth through repositioning, redevelopment and/or re-leasing; also, build-to-suit and/or new ground-up development.

**Preferred Property Types** - Suburban office, Medical office, Flex and Industrial - (secondary and tertiary markets okay)

**Property Markets** - Mid-Atlantic to Northeast with a preference for properties in the New England states

**Preferred Deal Size** - \$5 million to \$30 million

**Quality** - Class A, upgradable Class B and C

**Occupancy** - 60% plus

**Due Diligence/Closing** - Whelan has the ability to act quickly, with responsive feedback.

**Broker Relationship** - Whelan Associates acts as a principal and does not participate in brokerage fees.

If you have a property that fits the criteria above, please send all available information to:

Richard E. (Rick) Barnes, Vice President  
Whelan Associates, LLC  
Union Square Office Centre  
174 Union Street, Fourth Floor  
New Bedford, MA 02741  
Phone (508) 984-4100  
Fax (508) 984-4101  
[rebarnes@whelanassociates.com](mailto:rebarnes@whelanassociates.com)