

Webinar

# 2 Things That Hurt Real Estate Businesses: Spreadsheets & Stale Relations

Jason Gilbert & Mike Sebastian

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A few important reminders:

To qualify for CPE, participants must:

- Login using their own computer (not from a conference room)
- Actively respond to all polling questions and stay on for the duration of the broadcast
- If you have technical difficulties responding to the polling questions, please send an email to [elevatelearn@armaninollp.com](mailto:elevatelearn@armaninollp.com) with the name/date of your session along with your poll responses.

Learning Objectives:

- Identify solutions for addressing documents: K1s and quarterly reports
- Create faster ways to manage your investments
- Discover ways to automate your business through a demo of AppFolio's software solutions



Presenter

# Jason Gilbert

Partner

Armanino LLP



Presenter

# Mike Sebastian

Industry Principal, Investment Management

Appfolio Investment Management

# appfolio

Investment  
Management



## Relationship Management (CRM)

Efficiently manage relationships and interactions with your investors within a robust CRM system.



## Investment Management

Promote new offerings, track interest of prospective investors and manage active investments.



## Investor Portal

Investors have easy 24/7 access to a dashboard summarizing important investment information.

# Smarter tools for a modern investment management

appfolio Investment Management

- ~ **Easy to Use**, learn, and train new employees
- ~ **Impress Investors** with a portal that keeps them updated, informed, and engaged
- ~ **Manage Fundraising**. Promote new opportunities and track interest of prospective investors
- ~ **Evolve beyond Spreadsheets**. Organize assets in one central hub to increase efficiency and mitigate risk



