

Case Study:

Forecasting & Budgeting



Real Estate Investment and Development Company Selects

 **for Forecasting & Budgeting**

Company and Situation Overview

- Headquartered in Eastern U.S.
- Boot-strapped company managing \$10M+ of real estate development
- Founder and CEO with no help in finance and operations functions

Challenges without RTD Insights

- X No support for Founder and CEO to assess viability of new real estate development and investment opportunities
- X Limited ability to generate clean forecasts and budgets to determine ROI of custom estates and luxury condominium investments
- X Limited view into IRR of properties over investment horizon

Results with RTD Insights

- ✓ Worked closely with Founder and CEO to create a simple, powerful forecast and budget tool to be used to assess all new and existing properties
- ✓ Provided input and enhancements to existing schedules and KPIs used to assess ROI and IRR of investment portfolio