

Mastering Real Estate Financial Modeling: A 5-Day Intensive

7 – 11 June 2027
Lisbon (Portugal)

UK Training

PARTNER



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Why This Course

In today's competitive real estate market, sound financial modeling is essential for making informed investment, development, and portfolio decisions. Professionals who can accurately model cash flows, evaluate risks, and analyze multiple scenarios gain a strategic advantage in structuring deals and maximizing returns.

This intensive 5-day Real Estate Financial Modeling program equips participants with the technical skills, analytical frameworks, and practical know-how to create sophisticated models for property acquisitions, development projects, and multi-asset portfolios. The course blends theory with hands-on Excel exercises, enabling participants to immediately apply their learning to real-world real estate scenarios.

What You'll Learn and Practice

By attending this program, you will be able to:

- Build complex real estate financial models in Excel with accuracy and efficiency.
- Analyze various property types including multifamily, office, retail, and industrial.
- Evaluate investment opportunities using key financial metrics such as NOI, Cap Rate, Cash-on-Cash Return, and IRR.
- Perform sensitivity and scenario analyses to assess risk and optimize decision-making.
- Model development projects, joint ventures, and advanced investment structures.

The Program Flow

Day 1: Foundations of Real Estate Financial Modeling

- Introduction to real estate finance and investment analysis
- Excel modeling best practices and essential functions
- Building a basic property-level cash flow model
- Key financial metrics: NOI, Cap Rate, Cash-on-Cash Return, IRR

Day 2: Acquisition Modeling

- Developing a comprehensive acquisition model
- Modeling complex rent rolls and lease structures
- Incorporating financing assumptions and debt schedules
- Sensitivity analysis and scenario modeling techniques

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A graphic of a chessboard with several chess pieces. A large gold king piece is in the foreground, with a silver pawn and a silver knight behind it. The board is checkered, and there are concentric circles in the background.

Day 3: Development Modeling

- Creating a dynamic development pro forma
- Modeling construction costs, timelines, and lease-up assumptions
- Accounting for development fees and promote structures
- Residual land value analysis and feasibility studies

Day 4: Portfolio and Fund Modeling

- Building multi-property portfolio models
- Modeling fund-level cash flows and waterfalls
- Incorporating asset management and disposition assumptions
- Advanced techniques for returns analysis and benchmarking

Day 5: Advanced Topics and Case Studies

- Modeling joint venture structures and promote calculations
- Monte Carlo simulation for risk analysis
- Real-world case studies and troubleshooting modeling challenges
- Best practices for model auditing and quality control

Individual Impact

Participants will leave the course with:

- The ability to construct institutional-quality financial models for a variety of real estate scenarios.
- Enhanced analytical skills to evaluate investment opportunities and optimize deal structures.
- Confidence in performing scenario analysis and risk assessments for complex projects.

Organizational Impact

Organizations will benefit from:

- More accurate and reliable investment and development decisions.
- Streamlined financial analysis processes, reducing errors and improving efficiency.
- A workforce capable of delivering robust models that support strategic real estate initiatives.

Training Methodology

- Hands-on Excel exercises using real-world property data
- Case studies of acquisitions, developments, and portfolio management
- Scenario analysis workshops and sensitivity testing
- Group exercises for joint venture modeling and deal structuring

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Beyond the Course

By the end of the five days, participants will be prepared to:

- Build and manage complex real estate financial models with confidence.
- Apply advanced analytical techniques to guide investment and development decisions.
- Deliver actionable insights to stakeholders for improved decision-making.
- Contribute to the strategic growth and profitability of real estate portfolios.

A graphic of a chessboard with several chess pieces (a king, a queen, and a pawn) on it, set against a background of concentric circles.

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