



ACCOUNTING AND FINANCE | AF-050

Real Estate Asset and Portfolio Management

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Course content

Why Attend

Owning real estate is not a passive activity. The returns of a property or portfolio depend heavily on active decisions about leasing, capital expenditure, repositioning, financing and the timing of sales.

This course equips participants with the tools to manage real estate as an investment: business plans for individual assets, portfolio construction and diversification, performance measurement, value-add strategies and hold-or-sell decisions.

Course Methodology

- Expert briefings on asset and portfolio management
- Case studies of value-add and repositioning projects
- Exercises on asset business plans and performance reports
- Group portfolio strategy simulation
- Discussion of participants' own portfolios and challenges

Course Objectives

- Distinguish asset management from property and facility management
- Prepare and monitor a business plan for a real estate asset
- Identify value-add opportunities through leasing, repositioning and capital works
- Construct and diversify a real estate portfolio
- Measure portfolio performance against targets and benchmarks
- Make informed hold, refinance and sell decisions

Target Audience

- Real estate asset and portfolio managers
- Investment managers in funds, family offices and corporates

Course content

- Property managers moving into asset management
- Finance managers responsible for real estate holdings

Course outline

Detailed course outline

Day-by-day outline for Real Estate Asset and Portfolio Management.

Day 1 - Real Estate as a Managed Investment

- 09:00-09:54 | Asset, property and portfolio management roles
- 09:54-10:48 | Investment objectives and risk appetite
- 10:48-11:00 | Core, value-add and opportunistic strategies
- 11:00-11:30 | Coffee break
- 11:30-12:12 | Core, value-add and opportunistic strategies (continued)
- 12:12-13:06 | Ownership structures and governance
- 13:06-14:00 | The asset manager's toolkit

Day 2 - The Asset Business Plan

- 09:00-09:54 | Analysing the current performance of an asset
- 09:54-10:48 | Leasing strategy and tenant mix
- 10:48-11:00 | Capital expenditure and refurbishment plans
- 11:00-11:30 | Coffee break
- 11:30-12:12 | Capital expenditure and refurbishment plans (continued)
- 12:12-13:06 | Operating cost optimisation
- 13:06-14:00 | Monitoring the business plan

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Day 3 - Creating Value

- 09:00-09:45 | Repositioning and change-of-use opportunities
- 09:45-10:30 | Lease restructuring and income growth
- 10:30-11:00 | Sustainability upgrades and their effect on value
- 11:00-11:30 | Coffee break
- 11:30-11:45 | Sustainability upgrades and their effect on value (continued)
- 11:45-12:30 | Refinancing and capital structure
- 12:30-14:00 | Case study: a value-add strategy

Day 4 - Portfolio Strategy and Performance

- 09:00-09:54 | Portfolio construction and diversification
- 09:54-10:48 | Allocation by sector, location and risk
- 10:48-11:00 | Performance measurement and benchmarking
- 11:00-11:30 | Coffee break
- 11:30-12:12 | Performance measurement and benchmarking (continued)
- 12:12-13:06 | Reporting to investors and boards
- 13:06-14:00 | Portfolio risk management

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Day 5 - Hold, Sell or Reinvest

- 09:00-09:45 | Hold-or-sell analysis
- 09:45-10:30 | Disposal strategy and timing
- 10:30-11:00 | Reinvesting capital
- 11:00-11:30 | Coffee break
- 11:30-11:45 | Reinvesting capital (continued)
- 11:45-13:15 | Group portfolio simulation and presentation
- 13:15-14:00 | Personal action plan

Seminar dates

Available seminar dates

Live dates and pricing for Real Estate Asset and Portfolio Management generated from the course details page.

Date	Location	Format	Fee
21 - 25 December 2026	Frankfurt	Classroom	€2,275
18 - 22 January 2027	London	Classroom	€2,315
15 - 19 February 2027	Istanbul	Classroom	€1,978
15 - 19 March 2027	Vienna	Classroom	€3,225
19 - 23 April 2027	Barcelona	Classroom	€2,815
17 - 21 May 2027	Paris	Classroom	€3,825
21 - 25 June 2027	Frankfurt	Classroom	€2,275
19 - 23 July 2027	Barcelona	Classroom	€2,815
16 - 20 August 2027	Frankfurt	Classroom	€2,275
20 - 24 September 2027	London	Classroom	€2,315

Seminar dates

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Date	Location	Format	Fee
18 - 22 October 2027	Istanbul	Classroom	€1,978
15 - 19 November 2027	Cape Town	Classroom	€1,625
20 - 24 December 2027	Barcelona	Classroom	€2,815
21 - 25 December 2026	Online / Live	Online / Live	€1,815
18 - 22 January 2027	Online / Live	Online / Live	€1,815
15 - 19 February 2027	Online / Live	Online / Live	€1,815
15 - 19 March 2027	Online / Live	Online / Live	€1,815
19 - 23 April 2027	Online / Live	Online / Live	€1,815
17 - 21 May 2027	Online / Live	Online / Live	€1,815
21 - 25 June 2027	Online / Live	Online / Live	€1,815

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19 - 23 July 2027	Online / Live	Online / Live	€1,815
16 - 20 August 2027	Online / Live	Online / Live	€1,815
20 - 24 September 2027	Online / Live	Online / Live	€1,815
18 - 22 October 2027	Online / Live	Online / Live	€1,815
15 - 19 November 2027	Online / Live	Online / Live	€1,815
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