TITLEMAN

FOR OWNERS AND ASSET MANAGERS

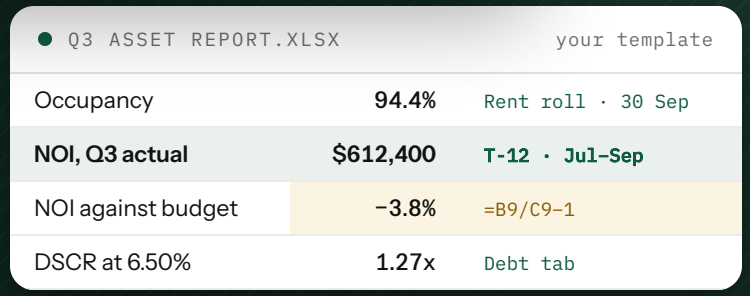
Your asset management, on AI.

Your stack, any stack. Our engine in the middle. Answers land where you work.

What arrives in your inbox, and what changes around your assets, runs through our engine for real estate, enriched with 2,100+ sources, and lands back where you work: more accurate, faster, at a lower cost per asset. The first workflow runs 72 hours after access.

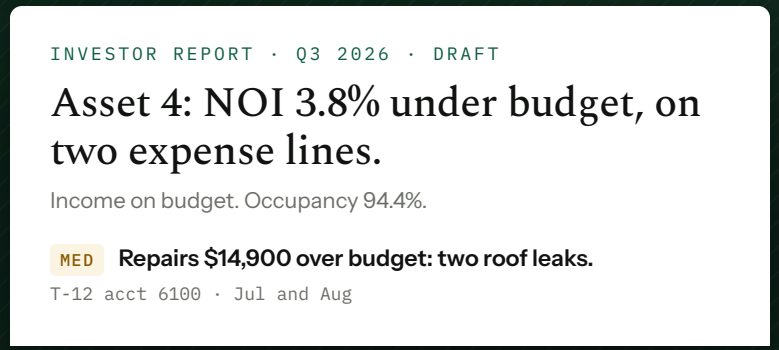


01
THE PACKAGE ARRIVES



02
YOUR REPORT BOOK FILLED

03
DRAFT FOR YOUR REVIEW



Everything your firm already has, working with 2,100+ sources.

We connect what you already use and match it against our property base, inside your setup. You get more accurate, faster, at a lower cost per asset, starting with one workflow in 72 hours.

WHAT OF YOURS WE CONNECT

1. **Your managers' packages and files:** rent rolls, T-12s, budgets, leases and data-room PDFs.
2. **Your own Excel models,** up to 40 MB a file, changed by typing.
3. **Deals you forward by e-mail:** OM, rent roll and T-12 come back as one screened package.
4. **The AI assistant your team already uses.**
5. **Connected by our team at the start:** whatever your firm uses, from your mailbox and data rooms to your CRM and data warehouse.

INSIDE YOUR SETUP

WHAT IT MEETS

2,100+ sources connected

A property base of about 6 million properties: owners, sales, loans and maturities, permits, dated events (tax delinquency, foreclosure filings, code violations) and about 50 signals.

Deepest in Florida, Texas, North Carolina, California, New Jersey, New York, Massachusetts and Washington.

Every figure keeps its date, and its source inside the report.

DONE BY OUR TEAM IN THE 72-HOUR START

Send us your portfolio list. Our team matches every asset to our property base and returns it with owner, last sale, debt and maturity, permits, dated events and signals, each with its date. What we could not match is named, not guessed.

Our engineers run the match for you, as part of the start. Your files stay in your firm's workspace.

Owning the assets is the job. The spreadsheet work around them takes the week.

What we hear from owners and asset managers.

01

“Our portfolio model is a huge file only one analyst dares to touch.”

Every new scenario waits for one person, and nobody else can check it.

02

“Every quarter we rebuild the hold/sell view by hand.”

New rent roll, new T-12, new rates: the same rebuild, asset by asset, before anyone can decide.

03

“A buyer or lender knows things about our building we haven’t looked at.”

A sale next door, a permit down the street, a neighbor’s loan coming due. Found late, if at all.

A TYPICAL QUARTER TODAY

ARRIVES
Packages from each property manager, each in its own shape

→

BY HAND
Re-keyed into the report book

→

BY HAND
Variances to budget explained line by line

→

BY HAND
Hold, sell and refinance views rebuilt

→

BY HAND
Investor and lender reports written

Your stack, any stack. Our engine in the middle. Answers land where you work.

WHAT YOU ALREADY HAVE

Any stack, as it is

- Your inbox: deals, managers' packages
- Your data rooms and shared folders
- Your CRM and deal lists
- Your Excel models and rent rolls
- The territory you set around your assets

THE TITLEMAN ENGINE FOR REAL ESTATE

One step in your workflow

1. **Reads it**
   Rent rolls, T-12s, leases, OMs, models: every figure with its page or cell.
2. **Enriches it with 2,100+ sources**
   Owners, sales, loans and maturities, permits, dated events, rents nearby.
3. **Draws the conclusions**
   The memo, the live Excel model, the comps and the flags, each traced to its source or formula.

LANDS WHERE YOU LIKE

Wherever you work

- E-mail, as a reply with every file attached
- WhatsApp or Telegram, as a short digest
- Your CRM, on the record it belongs to
- Your Excel model or report book
- Your AI assistant can also ask it directly

Set up once, it runs on its own: nothing to move, no new screen to learn, no files carried by hand.

Your data enriched with ours: underwriting and every other report back in under an hour.

THREE PROMISES

Yours only
your files serve your work; no training on them

NDA first
nothing is connected before it

Your sign-off
every output is a draft your team signs

The manager's monthly package arrives. It comes back analyzed.

TRIGGER in your inbox

From: Property manager, Asset 4 · Mon 9:04

Q3 package: 180-unit garden apartments

- XLS Rent_Roll_30Sep.xlsx
- XLS T-12_Sep-2026.xlsx
- XLS Budget_2026.xlsx

A rule forwards every package to the engine. Nothing to do by hand.

Set up once at the start: a forwarding rule

→

ENGINE reads, checks, enriches

READS	The rent roll, the T-12 and the budget, every figure with its page or cell
CHECKS	Rent roll tied to the T-12; actuals against your budget, line by line
ENRICHES	From 2,100+ sources: sales nearby, new permits, liens and tax status
CONCLUDES	Variances over your threshold flagged; a draft note written

Every input with its source and date; every result with its formula

→

LANDS back in your inbox

To: you · Re: Q3 package, Asset 4

NOI $612,400: 3.8% under budget, on two lines

Repairs **+$14,900** (two roof leaks) and the insurance renewal **+$9,300**. Income on budget; 170 of 180 units leased.

- XLS Q3 Asset Report.xlsx · your template
- PDF Variance note · Asset 4
- PDF Passport · Asset 4

E-mail | Your report book | Telegram | WhatsApp

EXAMPLE

Asset 4, Q3: NOI $612,400 against a $636,600 budget (−3.8%). The two lines that explain the whole $24,200 gap come back flagged, each with its T-12 account.

WHAT IT REPLACES

Re-keying each manager's package and writing the variance note from a blank page.

Something changes nearby. You get it analyzed by morning.

TRIGGER the territory you set

Area	1 mile around your 6 assets
Asset types	apartments, retail, office
Size	50+ units or 20,000+ SF
Watch for	sales, permits, loans due
	distress, foreclosure filings

Set up once at the start; change it any time

→

ENGINE spots it, explains it

SPOTS A new event on your ground: a sale, a permit, a loan coming due, a filing

ENRICHES From 2,100+ sources: the owner behind the LLC, last sale, debt and maturity

CONCLUDES What it means for your asset: a comparable, new supply, a possible add-on

Every input with its source and date; every result with its formula

→

LANDS your morning radar

Morning radar · Wed 14 Oct, 7:00

3 new around your assets

SOLD	188 units, 0.6 mi from Asset 1: your next comp	Sep 2026
PERMIT	240 new units, 0.9 mi: supply in 2027	2 Oct
LOAN DUE	center next to Asset 2, coverage 1.08x	Feb 2027

E-mail · Telegram · WhatsApp · Your CRM

EXAMPLE

Around 6 assets this week: 5 new signals. One neighbor's loan comes due in February at 1.08x coverage, with the owner named: a possible add-on next to Asset 2.

WHAT IT REPLACES

Hearing about it from a broker, months later.

18 months before maturity, the refinance test is in your inbox.

TRIGGER your maturity schedule

Your schedule · checked every month

Asset 3: $20.0M due Aug 2027

140,000 SF suburban office	18 months out
Latest rent roll and T-12	from the package
Rates to test	5.50% to 7.00%

Every asset with a loan inside the window gets the same test.

Checked every month, every asset with a loan

→

ENGINE builds the cases

READS The latest rent roll and T-12, and your loan terms

ENRICHES From 2,100+ sources: sales of the same type within a mile, last 24 months

CONCLUDES Hold, sale and refinance cases in a live Excel; DSCR and debt yield at each rate

Every input with its source and date; every result with its formula

→

LANDS in your inbox

To: asset manager · Refinance test, Asset 3

Coverage falls under 1.00x above 6.25%

Rate	5.50%	6.00%	6.50%	7.00%
DSCR	1.09x	1.03x	0.98x	0.93x
Debt yield	7.4%	7.4%	7.4%	7.4%

XLS Asset 3 model.xlsx · live formulas

PDF Memo: the facts, the decision stays yours

E-mail | Your maturity schedule | Telegram

EXAMPLE

Asset 3 carries $1,480,000 of NOI against $20.0M due in August 2027: 0.98x at 6.50%. The memo shows which lines move it; the call stays yours.

WHAT IT REPLACES

The quarterly rebuild by hand, and the first surprise on the lender's call.

Before the option date, the renewal pack is in your inbox.

TRIGGER your lease schedule

Lease abstract · Asset 2

Suite 104, café, 1,850 SF

Expires	31 Jul 2027
Option	1 × 5 yrs, 9 months' notice
In place	$29.40/SF, +3% a year
Page	p.4 §3.2

Every lease in the schedule, checked every month

→

ENGINE prices the renewal

READS The lease: rent, term, option and increases, each with its page

ENRICHES From 2,100+ sources: rents within a mile from the last year

CONCLUDES The band (low, middle, high) and the rent a year at each, as formulas

Every input with its source and date; every result with its formula

→

LANDS in your inbox and model

To: asset manager · Renewal pack, Suite 104

Market band $31.50 to $36.00; in place $29.40

LOW	MIDDLE	HIGH
$31.50	$33.75	$36.00

XLS Rate table · 5 rents nearby, dated

XLS New rent written into your model

E-mail · Your model · WhatsApp

EXAMPLE

Suite 104 pays $54,390 a year today. At the middle of the band it would pay $62,438. The pack lands with the five rents behind the band, each dated.

WHAT IT REPLACES

Finding the option date in a PDF, and a renewal rent set by feel.

Quarter end: the whole portfolio, marked in one go.

TRIGGER

Quarter end, or any day you choose: your list of up to 100 addresses, as a spreadsheet. Review the request first; nothing starts until you confirm.

ENGINE

Values each address against its comparable sales from 2,100+ sources and marks its confidence, row by row.

LANDS

One workbook in your inbox, filling in as each property is valued: a value range, the comps and a confidence mark per row.

Portfolio marks, 2026.xlsx YOUR LIST

63 of 100 valued — filling in

	Asset	Value range	Comps	Confidence
1	212-unit garden apartments	$31.4M–$34.3M	7	HIGH
2	96,000 SF neighborhood retail	$23.2M–$24.9M	3	MEDIUM
3	140,000 SF suburban office	$15.6M–$17.4M	2	LOW
4	180-unit garden apartments	$41.6M–$43.9M	3	MEDIUM
5	310,000 SF warehouse	$36.6M–$40.6M	4	HIGH
6	64-unit mid-rise apartments	$10.9M–$11.9M	6	HIGH
7	*48-unit walk-up apartments*	*valuing…*		
8	*22,000 SF strip center*	*queued*		

Review your request first Nothing starts until you confirm.

> For the yearly marks to partners, a cross-check before the quarter's own marks, or every asset with a loan coming due. A second look, not an appraisal: each value shows the sales behind it.

Change your own model by typing. Every change is shown before it lands.

Portfolio Model FY27.xlsx YOUR FILE

	A · Debt	B · Asset 1	C · Asset 2	D · Asset 3	E · Asset 4
12	Loan balance	24,800,000	15,600,000	20,000,000	25,500,000
13	Matures	Mar 2027	Nov 2027	Aug 2027	Jun 2028
14	Refinance rate	6.00%	6.00%	6.50%	6.00%
15	Amortization, years	30	30	30	30
16	Annual debt service	1,784,262	1,122,359	1,516,963	1,834,625
17	**DSCR after refinance**	**1.24x**	**1.50x**	**0.98x**	**1.34x**

Assets | Rent | Budget | **Debt** | Cash flow | Returns | Sources

ASK Set the refinance rate on Asset 3 to 6.5% and show what moves.

BEFORE YOU APPLY — 3 cells, outlined

Debt!D14	~~6.00%~~ **6.50%** the input you asked for
Debt!D16	~~1,438,921~~ **1,516,963** formula kept, recalculated
Debt!D17	~~1.03x~~ **0.98x** formula kept, recalculated

Apply | Discard

Version 14 saved · undo any step
Export: your same file, with the changed cells

WHAT COMES IN

Your own workbook as it is, up to 40 MB per file: portfolio model, rent rolls, budgets.

WHAT COMES BACK

The same file with the cells you asked to change. Formulas are never overwritten silently.

IN WHOSE TEMPLATE

Yours. Your tabs, your formulas, your layout.

WHAT IT REPLACES

Waiting for the one analyst who dares to touch the file.

Your portfolio on AI: faster work, and a lower cost per asset.

FASTER

Measured, not promised

Medians of our production runs, last 30 days, from request to delivered files

Property passport	about 4 min
Market rent table	about 15 min
Comps	about 20 min
Up to ten properties valued at once	about 30 min
Value opinion	about 40 min
Underwriting with its live Excel model	about 1 hour

MORE ACCURATE

How it works

- Every input shows its source and date; every result shows its formula.
- What we could not find is named as missing, never filled in.
- The same comps request returns the same set. The same feasibility request returns the same study.

LOWER COST PER ASSET

Check, don't collect

- One request returns the finished package: the memo, the live Excel, and a deck if you want one.
- An underwriting carries about 1,000 data points, each marked as found with its source, computed by formula, or missing.
- Your team checks and decides instead of collecting.

START Your first workflow runs on your own assets 72 hours after we get access.

One workflow, live on your assets in 72 hours.

Day 1 · Map

We sit with the person who does the work and write it down: what comes in, what is checked, which template, who signs.

FROM YOU
An hour with the process owner

Day 2 · Build

We set up the first workflow: your inbox forwards the packages to the engine, the answers land in your report book. Then one asset runs.

FROM YOU
Your template and one asset's package

Day 3 · Run and measure

Your team runs it on more assets. Together we time each one and check every figure against its page or cell.

FROM YOU
Two or three more assets

Then · Annual agreement

We keep it running and tuned, and add the next workflow with you: map, build, run.

FROM YOU
The next workflow to map

TO START

1. NDA in place
2. One process owner
3. Your current template
4. One asset's package and your portfolio list
5. Access to where the packages arrive

WHERE OWNERS START

Apartments	Workflow 1: the managers' packages, back analyzed
Shopping centers	Workflow 4: a renewal pack before each option date
Office	Workflow 3: the refinance test before each maturity
Industrial	Workflow 4: warehouse renewals against today's rents
Family office	Workflows 1 and 2: the managers' packages, and the radar

Which workflow first?

Your stack, any stack: our engine in the middle, answers where you work. More accurate, faster, at a lower cost per asset. Tell us the workflow, or take one hour with us on one of your own assets. We send our NDA; 72 hours after access, the first one runs.

TICK ONE WORKFLOW

- [ ] 1 · Inbox: the managers' packages, back analyzed
- [ ] 2 · Radar around our assets, every morning
- [ ] 3 · Refinance test before each maturity
- [ ] 4 · Renewal pack before each option date
- [ ] 5 · Portfolio marks at quarter end
- [ ] One hour on one of our own assets first
- [ ] Something else: _____

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