



The **Investment Deal of the Year Award** is open to investment transactions closed during the Eligibility Period January 1, 2017 to December 31, 2017. If it is a single property transaction, the property must be located within Calgary and Region and must be used for office, industrial or retail / mixed use purposes. If it is a portfolio transaction, a material component of the properties portfolio must be located within Calgary and Region. The value of the transaction must be a minimum of \$20,000,000 in order to be eligible. Projects or portfolios in which the purchaser occupies space (or intends on occupying space) are eligible for the Award, provided that a minimum of 50% of the leasable area is leased or available for lease by third parties. All deals within the City of Calgary and the Greater Calgary Area are eligible for this award.

**Check off all boxes to ensure eligibility criteria are met:**

- Eligibility Period: Investment transaction closed during January 1, 2017 to December 31, 2017.
- Property must be located within Calgary and Region.
- Property is used for office, industrial, retail or mixed use.
- Value of the transaction must be a minimum of \$20,000,000.

*Privacy Statement: The information collected on this form will be used for the sole purpose of administering the NAIOP Awards and the applicant understands that the winner's name will be announced at the REX Gala and may be published on the NAIOP Calgary Chapter website and in other media announcements.*

**Submission Identification**

Submission Deadline: Friday, September 28, 2018

Property / Portfolio Name \_\_\_\_\_

Property Address(es) \_\_\_\_\_

Key Contact Name \_\_\_\_\_ Email Address \_\_\_\_\_

Primary Phone Number \_\_\_\_\_ 2nd Phone Number \_\_\_\_\_

**Transaction Description and Summary**

(Please note: this form and all attachments and inclusions must be submitted in PDF format. See specifications on page 3).

Attach a detailed typewritten description of the transaction to this Submission Form. The description is your chance to explain why you think your investment deal deserves to be recognized as the best investment deal of the year. The award criteria outlined on page 3 should be used to guide the write-up; however, each submission should be tailored to highlight the most critical aspects of the deal, including the purchaser's investment thesis, the transaction's complexity, the creativity it required to complete, its financial success and its significance relative to other recent investment transactions. Be as specific as possible. Please note that how the applicant lists the submission information, including names and details on page 2, is how it will read in all marketing materials.

**Some of the topics you may wish to cover are:**

- Property (portfolio) description including location(s), building area(s) and major tenants
- Major terms and conditions of the purchase and sale agreement, parties to the agreement, etc.
- Purchaser's investment thesis
- Purchaser's asset management plan
- Investment risks and approach to mitigation
- Obstacles and how they were overcome
- Unusual or innovative aspects of the deal structure
- Strategic benefits achieved by the purchaser including value creation and other measures of financial success such as projected profit and/or IRR
- Impact of the transaction on the investment market

Also include and attach a brief separate typewritten **Summary**, using 50 words or less, which describes and captures the essence of the project in a manner that may be used in the REX Awards program or other marketing materials. Please clearly label this as the "Transaction Summary."

**Project Team Information** *Please print clearly.*

It is the responsibility of the key contact named on page one to consult with all of the individuals who may be identified here and ensure that all project team members have granted permission for their names and their companies to be included in this REX Award submission.

**A. Purchaser Name** \_\_\_\_\_  
Purchaser Contact Name \_\_\_\_\_  
Title \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_  
Mailing Address \_\_\_\_\_

**B. Purchaser Broker Name** \_\_\_\_\_  
Purchaser Contact Name \_\_\_\_\_  
Title \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_  
Mailing Address \_\_\_\_\_

**C. Vendor Name** \_\_\_\_\_  
Vendor Contact Name \_\_\_\_\_  
Title \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_  
Mailing Address \_\_\_\_\_

**D. Vendor Broker Name** \_\_\_\_\_  
Vendor Contact Name \_\_\_\_\_  
Title \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_  
Mailing Address \_\_\_\_\_

**E. Other Team Member Name** \_\_\_\_\_  
This Member's Role \_\_\_\_\_  
Other Team Member Contact Name \_\_\_\_\_  
Title \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_  
Mailing Address \_\_\_\_\_

**F. Other Team Member Name** \_\_\_\_\_  
This Member's Role \_\_\_\_\_  
Other Team Member Contact Name \_\_\_\_\_  
Title \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_  
Mailing Address \_\_\_\_\_

**Award Criteria:**

**Business Rationale** – Describe the drivers and targeted business benefits/aims that provided the rationale and context for the initiative. Was it a solution to a problem? Did a new market or opportunity present itself? Was this deal a way of making the business more sustainable?

**Innovation & Creativity** – Describe how the initiative met business needs with details as to what made it innovative and creative

**Business Impact/Results**– Describe the impact of this transaction on business performance comparing results with original targeted benefits/aims. How has this transaction affected the business?

**Challenges/Solutions** – Describe issues/successes encountered during marketing, negotiations, due diligence, ownership structure, financing, closing

**PDF Submission including Photographs**

Include a minimum of three photographs of the project, including a description for each photo.

Please combine pages 1 and 2 of this form; plus the detailed description and summary requested on page one; plus project photos into a single PDF document (maximum file size 5 MB).

Please be aware of the submission deadline shown below and email the completed document to NAIOP Calgary Chapter before the deadline (details below). NAIOP does not assume responsibility for failed or undelivered emails.

**Award Selection Process**

- The NAIOP REX Advisory Committee reserves the right to determine the outcome of all award submissions and the issuing of awards in any given year.
- All submissions shall be reviewed by a Subcommittee of the NAIOP REX Advisory Committee. Award Finalists will be announced on or about October 26, 2018.
- NAIOP Calgary Chapter and its agents cannot be held responsible for publishing erroneous information resulting from inaccuracies or illegible entries there may be in this award submission.
- The winning team will be announced at the REX Awards Gala on November 21, 2018.

**SUBMISSION DEADLINE: 5:00 PM, Friday, September 28, 2018**

The key contact represents that all team members have agreed to be a party to this submission and have agreed to abide by the rules, guidelines and procedures of the REX Awards program.

Your submission must be compiled into a PDF and **emailed** to the NAIOP Calgary Chapter administration office, attention:

Stephanie Bird, REX Committee Chair  
REX@naiopcalgary.com  
Tel: 403-261-1189

Paper submissions are not eligible.

When your submission is successfully received, an acknowledgment email will be sent the following business day to the submitter.

**PLEASE NOTE:** If the confirmation does not arrive, it is the submitter's responsibility to follow up with the NAIOP Calgary Chapter administration office to ensure the submission is received.