



The **Investment Deal of the Year Award** is open to investment transactions closed during the Eligibility Period January 1, 2022 to December 31, 2023. 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 \$10,000,000 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, 2022 to December 31, 2023.
- 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 \$10,000,000.

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 27, 2024

Property / Portfolio Name _____

Property Address(es) _____

Key Contact Name _____ Email Address _____

Primary Phone Number _____ 2nd Phone Number _____

Transaction Description and Highlights

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

Provide any marketing materials or brochures you feel best represent the transaction. In addition to the marketing materials, please provide brief highlights of the investment not articulated in the marketing materials. We encourage you to use the written highlights to concisely explain why you think this transaction deserves to be recognized as investment deal of the year! The highlights should be tailored to identify the strengths of the transaction with respect to the Award Criteria on page 3 and could include considerations like:

- 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
- Creativity required to complete the transaction
- 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

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.

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."

(continued page 2)

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 submit one photo separately which you would like to be included in any media or event documents.

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 2024.
- 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.

SUBMISSION DEADLINE: 5:00 PM, Friday September 27, 2024.

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:

Paige Magnussen, REX Committee Chair
REX@naiopcalgary.com
Tel: 403-410-5674

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.