

# NRTA's 28<sup>th</sup> Annual Conference



## NRTA'S 2025 CONFERENCE

**SEPTEMBER 28 - OCTOBER 1, 2025**  
**Hyatt Regency Orlando, Florida**

***Unlock hidden value in lease portfolios through Strategy, Tech & Leadership***

- 
- **Maximize ROI**
  - **Optimize strategy**
  - **Elevate performance**

“  
The NRTA Conference gave me the tools and connections to elevate our lease strategy. An incredible experience.”

– Senior CRE Executive

## ***Maximize ROI. Optimize strategy. Elevate performance.***

In today's fast changing market, staying ahead isn't optional—it's essential. Portfolio managers, CFOs, real estate executives, and lease administrators must continually refine their strategies to cut costs, mitigate risks, and drive profitability.

### **MORE THAN A CONFERENCE! An Unparalleled Learning Experience**

For executives, asset managers, auditors, attorneys, CFOs, property managers, controllers, and franchise leaders—anyone responsible for optimizing lease management, reducing costs, and driving operational success.

### **What You'll Gain:**

- ✓ Smart, efficient asset management solutions to boost portfolio performance
- ✓ Cutting-edge insights on AI & Technology's impact on commercial real estate
- ✓ Exclusive networking with industry leaders and decision-makers

# **RESERVE YOUR SEAT NOW!**



# NRTA'S TENANTS IN COMMON 2025 CONFERENCE

Whether you're leading a national portfolio or managing your first commercial lease audit, this conference delivers targeted value at every stage of your career.

## Why Attend?

Your lease portfolio is one of your organization's largest financial commitments. Are you leveraging every opportunity to control costs, mitigate risk, and drive profitability? Join us this fall for an exclusive, results-driven learning experience designed specifically for decision-makers, executives, and industry influencers.

This isn't just another conference—it's a strategic investment in your bottom line.

- ✓ Data-driven insights
- ✓ Compliance and risk management
- ✓ AI-powered lease administration

**64 Expert-Led Classes & 15 Interactive Breakout Sessions**  
**Four Course Levels Tailored to Your Expertise & Growth Goals**  
**Three Career-Changing Days Packed with Actionable Strategies**

Join us to engage with peers and industry leaders to dive deep into the **SIX Core Areas** that Directly Impact Profitability:

- 1 Legal & Compliance:** Navigate lease negotiations and dispute resolution with confidence.
- 2 Cost Optimization:** Uncover cost-saving opportunities and streamline occupancy expenses.
- 3 Leadership Development:** Strengthen executive skills and build high-performing teams.
- 4 Real Estate Strategy:** Make data-driven decisions that enhance portfolio value.
- 5 Lease Audit & Accounting:** Ensure compliance while maximizing financial efficiency.
- 6 Technology & AI:** Leverage cutting-edge solutions to stay ahead of the competition.

# Why YOU Can't Miss This Conference!

## **NRTA WILL DELIVER!**

An all-new, comprehensive experience designed to fuel your growth, expand your network, and empower you to be at the top of your game. Get ready to have fun. Make valuable connections. And walk away with the knowledge and tools to take your portfolio management to the next level!

Join old friends, make new ones, and mingle with top industry leaders and experts ready to bring you the latest trends shaping the commercial real estate landscape. Whether you're a seasoned professional or just getting started, this conference is designed to deliver valuable insights tailored to all commercial tenants.

- ✓ **Gain Exclusive Knowledge** – Learn from dozens of thought leaders sharing best practices, real-world case studies, and lessons learned.
- ✓ **Earn CLE or CPE Credits** – Enhance your professional development while staying ahead in your field.
- ✓ **Engaging Roundtable Discussions** – Address your biggest challenges and collaborate with industry peers.
- ✓ **Targeted Presentations** – Explore key topics in technology, finance, business strategy, and professional growth.
- ✓ **Unforgettable Networking** – Connect with like-minded professionals in immersive experiences beyond the traditional meeting room.

***ADOPT PRACTICAL STRATEGIES TO STREAMLINE WORKFLOWS AND ELEVATE YOUR IMPACT.***

# CONNECT WITH THE PULSE OF THE INDUSTRY

## EXPLORE OUR DISCOVERY HALL

You're invited to experience **Discovery Hall 2025**—a vital part of our Conference Experience, previously known as the NRTA Trade Show. Discovery Hall offers a relaxed, interactive environment where attendees and exhibitors connect, exchange insights, and gain valuable competitive intelligence. It's the perfect place to engage with industry experts and explore the latest in portfolio management strategies.

- **Discover innovative tools** designed to streamline your processes and boost performance.
- **Build meaningful connections** with solution providers offering services that enhance profitability and operational efficiency.

*Don't miss this opportunity to engage, explore, and elevate your real estate operations!*

### Conference 2025 is Your Chance To:

- Connect with your peers who totally get what you do and are eager to swap insights.
- Discover new tools and tricks that will help you streamline processes to maximize impact.
- Learn from the best—industry pros who've been where you are and know how to succeed.

Enjoy engaging, interactive sessions designed to give you hands-on experience with the latest trends and strategies.

*Achieve more with fewer resources – intelligently!*



### Keynote Spotlight:

## MEET COURTNEY CLARK

- ✓ Resilience. Change. Revisionary Thinking.
- ✓ Actionable strategies for adapting and thriving in evolving market conditions.
- ✓ Real insights to help you drive impact.

Watch Her 1-Minute Video Introduction

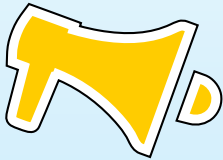
[Click to Watch](#)



**Courtney Clark** is a globally recognized keynote speaker specializing in adaptability, resilience, and navigating change. Her highly interactive and fun presentation is grounded in actionable strategies—no “toxic positivity” here! Expect practical tips on innovating, revising plans, and thriving in an ever-evolving commercial real estate landscape.

# Curriculum Spotlight: TECHNOLOGY & AI: THE FUTURE OF LEASE MANAGEMENT

- 💡 Master essential tools—Excel, PowerPoint, Word—for improved efficiency.
- 💡 Discover how AI-driven solutions are revolutionizing lease administration.
- 💡 Learn best practices for integrating new tech into your operations.



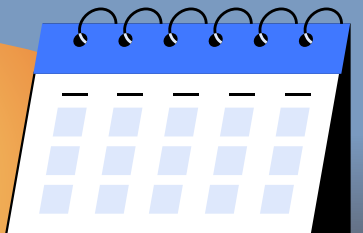
## Conference Spotlight: EXCITING UPDATES & NEW THIS YEAR

- 1. Boys & Girls Club Partnership:** We're teaming up again Sunday morning.
- 2. Monday Morning 5K:** Kick off the week with a fun 5K run with NRTA (shoutout to Matt Waters)!
- 3. Yoga Session:** Recharge with a general yoga session Monday at 12:30 PM in the Exhibit Hall—perfect for office workers (shoutout to James Rabb)!
- 4. Offsite Event:** Join us Tuesday night for a full venue buyout at Ole Red in Orlando!
- 5. Closing Session:** Don't miss our final session with ICSC leader Kevin Hewitt.

## EVENT DETAILS

Hyatt Regency, Orlando, FL  
September 28 – October 1, 2025

**Early Bird Savings:  
Register by 6/15/25  
to SAVE \$200**



*Your Competition Will Be There.  
Will You?*  
**SECURE YOUR SPOT TODAY.**

**Scan to Register**



# **WITH NRTA'S EXPERTISE, YOU CAN STREAMLINE OPERATIONS, ENHANCE TENANT SATISFACTION, AND BOOST YOUR PORTFOLIO'S ROI.**

## **What Past Attendees Say:**

“

*I left with strategies that immediately made a difference in our lease negotiations.”*

– General Counsel

“

*The NRTA Conference is a must-attend. Whether you've been in the industry for one year or 20, the opportunity to connect with peers, share insights, and stay ahead of industry changes is invaluable.*

*The relationships built here—along with the collaborative knowledge-sharing environment—are what keep me on the cutting edge of lease administration and looking forward to this each year.”*

– Senior Director, Lease Administration

“

*Attending the NRTA Conference gave me the chance to network with like-minded professionals, share ideas, and build lasting relationships. It is an incredible experience—both professionally and personally.”*

– Senior Property Manager

## **Discover a smarter, more efficient way to manage your assets.**

“

*As a third party tenant vendor within a large company, it's easy to sort of stay in my bubble. But the NRTA has introduced me to networking opportunities I would not have had otherwise.”*

– Lease Audit Manager

“

*What differentiates the NRTA Conference from other conferences is its peers learning from peers. Real-life learning from someone who has learned through real life.*

*What you learn here will increase your knowledge and save money for your company.”*

– President

**IN AN EVER-EVOLVING MARKET, portfolio managers are constantly seeking innovative strategies to optimize diverse commercial assets. Join us and learn how to successfully navigate today's complex world of commercial real estate portfolio management!**

**ATTENDEES' COMPANIES SAVE MILLIONS AFTER APPLYING NRTA-LEARNED STRATEGIES.**

# REGISTER FOR CONFERENCE 2025

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## EVENT REGISTRATION ONLINE ONLY

CONFERENCE ATTENDEES	MEMBER	NON-MEMBER
Early Bird (SAVE \$200)	\$1,199	\$1,799
As of 6/15/25	\$1,399	\$1,999
Presenters/Comm. Members		\$850
<i>Note: Any changes after 8/1</i>		\$100

AND

## Don't forget to BOOK YOUR HOTEL ROOM

NRTA's Discounted Hotel Room Rate is:  
(only available through our link)\*

**\$209/night**  
plus applicable taxes

The cut-off date is September 9, 2025.

Scan to Book



\*The \$15/day resort fee is optional for NRTA Conference attendees. It will be adjusted by the front-desk team upon arrival for those who do not want the amenities included.

\*\*Please note: This is the only way to secure the discounted room rate. We do not have any other hotel partners, so please ensure that you book DIRECTLY through our official link above.

Learn More  
**NRTA.ORG**



# CONFERENCE AGENDA

Sept. 28-Oct. 1, 2025



SUNDAY

- 8:00-12:00 **Community Event** – *Sponsored by Gordon Brothers*
- 3:00-7:00 **Registration**
- 4:00-5:00 **First Time Attendee Orientation**
- 4:00-7:00 **Discovery Hall** (formerly Trade Show)
- 5:00-7:00 **Welcome Reception** – *Sponsored by Savills*

MONDAY

- 7:30-8:45 **Breakfast & Opening Remarks** – *Sponsored by Occupancy Cost Audit Group (OAG)*
- 9:00-10:00 **Session I** – Opening Session with Keynote Speaker Courtney Clark
- 10:00-10:30 **Break** – *Sponsored by Commercial Insurance Associates (CIA)*
- 10:30-11:30 **Session II**

LA-1	CO-5	OC-1	OC-6	LE-2	RE-1	LE-12	CO-2	LA-6	PD-1	TT-1
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- 11:30-12:45 **Lunch** – *Sponsored by Property Works* – Yoga with James Rabb 12:30

- 1:00-2:00 **Session III**

LA-2	CO-8	OC-2	LE-1	OC-9	RE-2	RE-3	CO-4	CO-1	PD-2	TT-2
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- 2:30-3:30 **Session IV**

RE-4	CO-7	OC-3	LE-3	LA-8	RE-5	LE-10	CO-6	LA-5	PD-3	TT-3
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- 4:00-4:30 **Wrap-up Session with Keynote Speaker in Trade Show Plaza International G-H**
- 4:00-7:00 **Discovery Hall** (formerly Trade Show)
- 5:00-7:00 **Reception** – *Sponsored by CoStar Real Estate Manager*

TUESDAY

- 7:30-8:45 **Breakfast** – *Sponsored by ICSC*
- 9:00-10:00 **Session V**

LA-3	LE-4	OC-8	LA-9	RE-6	RE-7	LE-11	LA-12	OC-4	PD-4	TT-4
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- 10:00-10:30 **Break** – *Sponsored by DR Lease Consulting LLC*

- 10:30-11:30 **Session VI**

LA-4	CO-9	OC-14	LA-10	RE-8	RE-9	LA-11	OC-10	OC-5	PD-5	TT-5
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- 11:30-12:45 **Lunch** – *Sponsored by Lease Administration Solutions, LLC (LAS)*

- 1:00-2:00 **Session VII**

LA-7	LE-5	OC-7	OC-13	RE-10	RE-11	LE-8	OC-12	PD-6	TT-6
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- 2:30-3:30 **Session VIII**

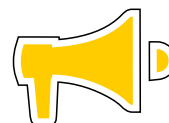
RE-12	LE-7	OC-11	CO-3	RE-13	RE-14	LE-9	LA-13	RE-15	PD-7	TT-7
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- 6:30-9:30 **Dinner – Peer-to-Peer Networking** – *Sponsored by Mohr Partners*

WEDNESDAY

- 7:30-8:45 **Breakfast**
- 9:00-10:00 **Session IX** – Closing Session with ICSC – Industry Update with Kevin Hewitt
- 10:30-11:30 **Session X**

RE-16	LA-14	OC-15/CO-10
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**Networking Available throughout the Event in Discovery 43 on the 3rd Level! – Sponsored by Commercial Asset Preservation (CAP)**

# 2025 Conference Curriculum



## Lease Administration (LA)

### LA-1, Understanding SNDA and Estoppel Documents (I)

**Monday: 10:30-11:30**

This course is designed for professionals involved in lease management and compliance. It provides a clear understanding of what lenders, landlords, and tenants aim to accomplish through Subordination, Non-Disturbance, and Attornment (SNDA) agreements and Estoppel Certificates.

Participants will explore best practices for preparing, reviewing, negotiating, and executing these documents. Real-world examples will illustrate the due diligence required prior to execution and highlight common pitfalls that can lead to unintended lease modifications or impacts to property title.

### LA-2, Cracking the Code: Utility Bill Auditing, Energy Procurement & Carbon Reporting Made Simple (I)

**Monday: 1:00-2:00**

This intermediate-level course equips retail tenants with practical tools to better understand, manage, and recover utility costs within their organizations. Attendees will gain step-by-step instruction on how to audit utility bills (both direct billed and landlord billed), decode charges, and identify opportunities for savings across electricity, gas, and other utility services.

The course demystifies utility rate structures and introduces strategies for negotiating competitive rates. This session will equip tenants with the tools to interpret utility bills, recover costs, and support sustainability efforts. Attendees will learn how to catch billing errors and overcharges and explore how deregulated energy markets can offer opportunities.

The course concludes with a look into carbon emissions tracking and how to develop sustainability reports. Attendees will walk away with a foundational understanding of how energy usage ties into environmental impact—and how to position their organization to meet both cost efficiency and sustainability goals.

Whether your goal is cost recovery, cost avoidance strategies, or corporate responsibility, this session delivers a practical framework you can take back to your organization. You'll leave with key insights, real-world examples, and a roadmap for aligning your energy data with both financial and environmental priorities.

### LA-3, AI Usage and Concerns in Corporate Real Estate (I)

**Tuesday: 9:00-10:00**

In this session, we will delve into the results of a recent survey conducted with the NRTA membership base, highlighting their current usage of AI, apprehensions, and candid thoughts. The intriguing data points gathered will serve as a foundation for discussing the concerns and potential of AI in corporate real estate, providing valuable insights into the industry's evolving landscape.

### LA-4, Real Applications of AI in Real Estate (I)

**Tuesday 10:30-11:30**

This presentation will showcase practical applications of AI in the real estate sector, tailored specifically for corporate occupiers. We will explore various ways AI can be leveraged today, supported by data points that illustrate adoption trends. Attendees will gain a comprehensive understanding of how AI is shaping the future of real estate and the opportunities it presents for enhancing operational efficiency and strategic decision-making.

### LA-5, Breakout, Adding Value in Distressing Times (A)

**Monday: 2:30-3:30**

### LA-6, Who Are YOU??? (I)

**Monday: 10:30-11:30**

How can we all get along when one tenant exits the center via the courts, and another buys their lease out of bankruptcy or otherwise? What clauses are beneficial for a surviving tenant(s)? In this interactive session, we will use real world-based hypotheticals and draw on actual landlord and tenant experience to explore the pitfalls and best practices in navigating these situations. The area of focus will be Use Clauses, and Cotenancy, but you never know, we might throw in a curve here and there.

### LA-7, Insurance Essentials for Commercial Leasing: Navigating Risk and Responsibility (I)

**Tuesday: 1:00-2:00**

This foundational session will guide you through key insurance concepts and common industry terms to help you evaluate what coverage you should—and shouldn't—be reimbursing your landlord for.

You'll gain clarity on interpreting lease requirements, identifying standard versus excessive coverage obligations, and understanding what impacts insurance costs. Real-world examples will help bring the material to life, and you'll



leave with a clear picture of the current insurance market and how to plan ahead in an evolving risk environment.

### LA-8, PANEL, Exploring Career Paths in Lease Accounting and Lease Administration (I)

**Monday: 2:30-3:30**

This dynamic panel discussion brings together seasoned professionals from across the lease accounting and lease administration landscape to share insights into the evolving career opportunities within the field.

Panelists will discuss current industry trends, in-demand skills, and the expanding role of lease professionals in today's business environment. Attendees will gain practical advice on career development, certifications, and how to transition between roles in lease administration, accounting, auditing, and compliance.

Whether you're just starting out, looking to advance, or exploring a career shift, this session will provide valuable perspectives and actionable guidance to help you navigate your professional journey.

### LA-9, PANEL, Cotenancy—Then, Now and In The Future (E)

**Tuesday: 9:00-10:00**

This course will consist of a moderated discussion of the history of co-tenancy provisions and how the clauses have evolved over time. The discussion will address the initial reason behind the co-tenancy provision and evaluate what tenants' current needs and expectations are for their co-tenancy provisions. The panelists, along with input from the audience, will also consider the triggers, remedies and enforcement techniques of co-tenancy provisions, as well as explore the future of co-tenancy provisions and their impact on the leasing and the operation of shopping centers.

## LA-10, Lease Abstraction Blueprint: Principles for Consistent and Accurate Lease Data (E)

Tuesday: 10:30-11:30

This session provides essential skills and insights into abstracting high-quality and consistent lease data. You'll learn foundational principles, including key terminology, critical provisions, and interpreting legal language within lease agreements. The course will offer practical exercises and real-world case studies to guide you step-by-step in extracting and summarizing vital lease information effectively.

Additionally, we'll discuss best practices for managing large lease portfolios, ensuring compliance, reducing risks, and leveraging technology and software tools to streamline abstraction processes. This course is specifically tailored to support professionals at all learning levels, ensuring a clear and accessible learning experience. By the end of the session, you'll have the confidence and capability to efficiently abstract leases, enabling informed strategic decisions based on accurate and reliable data.

### Key Takeaways:

- Understanding lease terminology and legal clauses
- Step-by-step guide to extracting critical data from leases
- Techniques for managing large lease portfolios and reducing risks
- Practical exercises and real-world case studies
- Introduction to lease management software and tools
- Best practices for ensuring compliance and accuracy

## LA-11, Breakout, Clause Discussion (I)

Tuesday: 10:30-11:30

## LA-12, Breakout, Non-CAM Lease Provisions to Share with your Deal Makers (I)

Tuesday: 9:00-10:00

This course will share key points and actionable items for attendees to share with the deal makers in your office to strengthen leases and make your future selves happier. Let's improve lease terms around:

- Rent Commencement
- Percentage Rent
- Exclusive Use
- Extension Option Terms
- Assignment and Transfers

## LA-13, Breakout, AI Technology

Tuesday: 2:30-3:30

## LA-14, PANEL, Unlock Insight. Expand Your Perspective. Lease Administration: Industry Access (E)

Wednesday: 10:30-11:30

Step into the conversation with some of the commercial real estate industry's most experienced voices.

Industry Access sessions connect you directly with respected leaders and subject matter experts in an open, interactive format designed for meaningful exchange.

Whether you're exploring the field, refining your expertise, or navigating a complex challenge, these Q&A-style sessions offer a space to ask questions, gain clarity, and deepen your understanding—no pressure, no pretense.

**Real insight. Real people. Real impact.**



### Legal Track (LE)

## LE-1, Basics of the Commercial Leases (B)

Monday: 1:00-2:00

This basic presentation, geared towards nonlawyers as well as lawyers new to the profession, will explore the key legal concepts found in the commercial lease. Attendees will learn the practical implications of these legal concepts and the competing interests driving negotiations between landlords and tenants in the selected lease provisions.

## LE-2, Updates in Real Estate Law (I)

Monday: 10:30-11:30

Experienced attorneys will explore recent updates in real estate law with a focus on retail and commercial leasing. They will highlight major legal trends and key insights from significant cases over the past year, offering practical guidance on negotiations, lease administration, and dispute resolution. Designed for attorneys, paralegals, and professionals with a working knowledge of real estate law, this intermediate-level course emphasizes best practices and actionable strategies.

## LE-3, Legal Ethics: Supervision of Non-attorney Legal Professionals (E)

Monday: 2:30-3:30

What are the ethical rules regarding paralegals and other non-attorney professionals? What are the duties of supervising attorneys? This interactive session will explore what is and isn't allowed under current ABA Rules as well as discussing how to avoid traps and other pitfalls in your practice.

## LE-4, Operating Costs and the Law (I)

Tuesday: 9:00-10:00

Seasoned attorneys will examine recent legal developments related to how landlords bill tenants for lease expenses, with a focus on identifying common areas of tenant overcharges. The session will also cover effective strategies for lease negotiations and resolving disputes when issues occur. Designed as an introductory course, it aims to spark questions and encourage interactive discussion. Key topics will include the legal principles governing triple net leases, lease interpretation,

audit rights, administrative application of the law, and practical approaches to addressing landlord pushback.

## LE-5, Navigating the Complexities of Franchise Leasing (I)

Tuesday: 1:00-2:00

Franchise leasing involves a unique set of considerations that impact both franchisors and franchisees, as well as landlords and lease administrators. This session explores the key elements of franchise lease agreements and the operational and legal nuances that distinguish them from traditional retail leases.

Attendees will gain insight into critical topics such as the role of the franchisor in lease negotiations, use restrictions, brand and design standards, co-tenancy clauses, assignment and transfer provisions, and the impact of franchise agreements on lease obligations.

Through real-world examples and expert guidance, participants will learn how to identify potential risks, ensure lease compliance, and support successful long-term franchise operations.

## LE-7, Key Considerations in Restaurant Leasing (I)

Tuesday: 2:30-3:30

Leasing space for a restaurant presents unique challenges and opportunities that differ from traditional retail leasing. This course is designed to help lease administrators, real estate managers, and legal professionals navigate the complex dynamics of restaurant leasing.

Topics will include common lease provisions specific to restaurants—such as exclusive use clauses, venting and grease trap requirements, liquor license contingencies, and percentage rent. The session will also address key negotiation points, landlord and tenant responsibilities, and how to anticipate operational needs unique to food service tenants.

Real-world examples and practical insights will equip attendees with the tools to effectively support and manage restaurant leases throughout their lifecycle.

## LE-8, Breakout, Data Centers (A)

Tuesday: 1:00-2:00

Join us for an interactive, open-forum discussion on the evolving landscape of data centers and the critical role of lease administration in supporting their growth. This session is designed for lease administrators and other professionals navigating the intersection of real estate, technology infrastructure, and compliance.

We'll explore key topics including:

- Challenges of lease lifecycle management for data center assets
- Differences between real estate and service-based lease models
- ASC 842 and IFRS 16 compliance for data center contracts
- Compare experiences with fixed power, variable power, cross-connects, bandwidth, and other recurring or usage-based elements
- Collaboration between legal, finance, and technical teams
- Best practices for managing colocation agreements, service orders, and asset tracking

### LE-9, Breakout, Managing Outside Counsel (A)

Tuesday: 2:30-3:30

### LE-10, Breakout, Delivery/Surrender of Premises (A)

Monday: 2:30-3:30

### LE-11, Breakout, Dispute Resolution/Strategies (I)

Tuesday: 9:00-10:00

### LE-12, Breakout, Lease Drafting (I)

Monday: 10:30-11:30



## Occupancy Cost (OC)

### OC-1, CAM Masters Class - Invest in Your Future: Master the Art of Auditing (A)

Monday 10:30-11:30

Audit Beyond the Basics: Dive Deep into Specialized Audit Areas. If you have mastered the basics of CAM reconciliations and desktop audits, then this course can help you to keep building your skills.

This interactive course will review CAM auditing and how to leverage knowledge in developing a strategy to present and negotiate disputes, dealing with audit restrictions, performing financial analysis to identify risks, discussing current trends, and touching on more advanced topics like ambiguous language, common area taxes, base years, cost pools and others.

Join your fellow Masters! Come engaged and ready to share your best practices and ideas to protect your company's critical assets and improve the bottom line!

### OC-2 CAM Crash Course – Buckle up for a Successful CAM Journey! (B)

Monday: 1:00-2:00

Ready to race to the finish line to elevate your professional game and boost your company's bottom line? Fasten your seat belts and take a joy ride with us to discover the secrets to becoming a CAM champion and watch your position soar! This basic course is intended to help newer auditors become more comfortable doing CAM Reconciliations and "desktop" audits, discussing the basic concepts involved and how to review them.

The course will cover the basic components of a CAM reconciliation, and the lease language related to them, how to calculate pro rata share, CAM caps, management and administrative charges, current industry issues related to CAM reconciliations and best practices to MAXIMIZE savings!

We welcome seasoned auditors to join us for new insights and discussions. Join us to see how your peers have navigated the latest race

against Landlord overcharges. This session will be followed by a Breakout Session for follow-up questions and discussion.

### OC-3, Breakout, CAM Crash Course – Buckle up for a Successful CAM Journey! Follow Up (B)

Monday: 2:30-3:30

### OC-4, Lease Auditing Workshop (B)

Tuesday: 9:00-10:00

Geared toward professionals new to the world of Lease audit. The Workshop course will focus on Desktop Audit Techniques. This basic class is designed for beginner to intermediate auditors who manage or participate in the desktop audit function. It will help participants design processes to manage workflow and completion of audits, give practical examples for conducting the audit, and tools for presenting findings. The session will include hands-on examples and discussion to help improve attendees' understanding of the materials presented. Topics will include CAM reconciliation process; desktop audit tools and techniques; and effectively presenting and resolving findings. This session will be followed by a Breakout Session for follow-up questions and discussion.

### OC-5, Breakout, Lease Audit Workshop Follow-Up (B)

Tuesday: 10:30-11:30

### OC-6, Learn How to Limbo: Intro to Tax Reimbursements (B)

Monday: 10:30-11:30

This introductory course will show how using the acronym L.I.M.B.O can make Landlord tax reconciliations easier to process and tax savings easier to secure. Tax bills and reconciliations appear inflexible on the surface. However, the presenters intend to share information and tips allowing everyone to become more limber in their approach to reviewing and disputing tax invoices.

### OC-7, Shifting Real Estate Footprints Can Make or Break Your Bottom Line (I)

Tuesday: 1:00-2:00

Real estate footprints are changing now more than ever. Right sizing square footage and shifting locations sometimes trigger abandonment, impairment, or termination lease accounting rules. Growing through mergers and acquisitions triggers business combination lease accounting rules. Choosing to utilize flexible office space can impact assets and liabilities on the balance sheet.

Knowledge is power. Knowing the impact of real estate transactions on financial statements can help inform decisions and ultimately help real estate professionals win big. After completing this course, you will be able to:

- Describe the differences between termination, impairment, and abandonment lease accounting rules

- Analyze the P&L impacts of discontinuing the use of a leased asset
- List key components of business combination lease accounting rules
- Determine if a flexible office arrangement needs to be presented on the balance sheet

### OC-8, Understanding Percentage Rent in Retail Leasing (I)

Tuesday: 9:00-10:00

This course provides a comprehensive overview of percentage rent, a common yet complex component of retail lease agreements. Participants will explore the foundational principles of percentage rent, including breakpoint calculations, gross sales definitions, exclusions, and audit rights. Through real-world examples and hands-on exercises, attendees will gain a practical understanding of how to interpret lease language, monitor sales reporting, and verify landlord calculations to ensure accurate and fair billing.

Designed for lease administrators, accountants, auditors, and real estate professionals, this session will also cover best practices for negotiating percentage rent clauses and implementing internal procedures to track and reconcile payments. Whether you're new to the concept or looking to sharpen your expertise, this course will equip you with the tools and confidence needed to effectively manage and audit percentage rent obligations.

### OC-9, Property Tax Appeals – From Challenge to Opportunity (E)

Monday: 1:00-2:00

Do you rely on landlords to reduce your property tax expense? Do you feel like you have little or no control over the increase in expense? Do you feel like you should challenge your landlord but don't know how? If you answer yes to any of these questions, this presentation is for you.

During this presentation we will provide insight on:

- Different approaches to valuing property and when each is considered/used
- How to make sure landlords are on top of appealing their properties
- What to look for and question regarding appeal opportunities
- How to track and analyze pending appeals, resolved appeals and refunds

### OC-10, Breakout, Let's Talk About Fees (E)

Tuesday: 10:30-11:30

## **OC-11, Occupancy Cost Provisions Drafting; How to leverage Your Lease Language to Maximize Audit Savings (I)** **Tuesday: 2:30-3:30**

Do you ever feel like your lease is holding you back on audit savings? Let us show you how you can elevate your audit game by adding clauses to your leases! This intermediate course is intended to highlight areas that prevent auditors from maximizing savings and to give deal makers and legal teams feedback to incorporate into their leases with language that will benefit the audit process.

This class will give attendees examples of suggested lease language that can be inserted into leases to help address problems that arise after a store is open and operating. We will explore audit roadblocks and lease language that causes grief and how to get your legal teams to change these clauses to help the Lease Admin and Audit teams.

We welcome seasoned auditors, lawyers, and deal makers to join us for new insights and discussions. Join us to see how your peers have successfully implemented clauses to raise the bar in audit savings.

## **OC-12, Peer-to-Peer Lease Audit Hypotheticals (A)** **Tuesday: 1:00-2:00**

The rapid pace of change in today's business landscape significantly impacts various aspects of Lease Auditing such as CAM, co-tenancy agreements, shopping center utilization, tax implications, and more. Deciphering your lease rights to safeguard your business has become increasingly challenging as a result. In this advanced-level discussion group we will explore the complexities of lease auditing by working in groups through three real-life case studies and developing approaches to resolve them. This peer-to-peer learning environment encourages participants to share experiences, expertise, and solutions and opens a window to the problem solving process that your peer administrators use.

## **OC-13, Now That I Have Your Attention – Drafting Effective Demand and Dispute Letters (I)** **Tuesday: 1:00-2:00**

Collaborate with industry veterans to review best practices in drafting dispute letters and responses to default notices that generate results! This workshop will focus on preparing an organized letter which incorporates the "must have" inclusions and recommended exclusions to compel landlord response and cooperation. Participants will be supplied with sample letters for review and discussion during the session.

## **OC-14, Q&A Landlord PANEL - Breaking Audit Barriers (E)** **Tuesday: 10:30-11:30**

Back by popular demand! We are continuing to break audit barriers! Have your multiple

requests for CAM support gone unanswered? Reached out multiple times to follow up with a Landlord regarding an audit dispute? What is the secret in getting Landlord's cooperation? Hear directly from our guest landlords and witness an insider's perspective on how! We are excited to host a panel of Landlord experts who have spent years in the trenches of the audit world. Take advantage of this can't miss opportunity to ask questions from the folks who have the answers you seek!

## **OC-15/CO-10, Unlock Insight. Expand Your Perspective. Lease Audit/ Industry Access Session (E):** **Wednesday: 10:30-11:30**

Step into the conversation with some of the commercial real estate industry's most experienced voices.

Industry Access sessions connect you directly with respected leaders and subject matter experts in an open, interactive format designed for meaningful exchange.

Whether you're exploring the field, refining your expertise, or navigating a complex challenge, these Q&A-style sessions offer a space to ask questions, gain clarity, and deepen your understanding—no pressure, no pretense.

**Real insight. Real people. Real impact.**



## **Office & Industrial (CO)**

### **CO-1, Management Fees, Administrative Fees and Capital Expenses (I)** **Monday: 1:00-2:00**

A peek behind the curtain – Understanding landlords' lease language and calculation methodologies related to management fees, admin fees and capital expenses and how they affect your CAM expenses. In this session, you will learn to identify the language triggers used (and sometimes buried) in leases that can have a material impact on your CAM rates. With examples of "good" and "bad" language and their related calculations, you will see the relative impact of what small changes can do.

### **CO-2, Breakout, Commercial Office Trends (I)** **Monday: 10:30-11:30**

### **CO-3, Base Years and Gross Ups (A)** **Tuesday: 2:30-3:30**

Who loves Gross Ups? Who benefits from a Base Year? Who truly comprehends these provisions and their intricate calculations? In this course, we will delve into why these provisions are incorporated into leases and how they can either serve as lifelines or stumbling blocks for tenants. Additionally, we will explore the correct

methodology for calculating Gross Ups and their impact on the base year. The learning objectives are as follows:

- Understanding the Purpose of Base Years and Gross Ups
- Learning the Fundamentals of Gross Up Calculations
- Examining Landlords' Use of Base Year and Gross Up Provisions
- Visualizing the Application of Gross Up Provisions in Commercial Leases
- Negotiating Better Base Year and Gross Up Provisions

By addressing these learning objectives, participants will develop a deeper understanding of Base Year and Gross Up provisions, enabling them to navigate lease negotiations more effectively and safeguard their interests in commercial real estate transactions.

## **CO-4, Global Leases, Local Challenges: Mastering International Lease Administration (A)** **Monday: 1:00-2:00**

Managing leases across borders introduces unique complexities—from navigating foreign laws and currency fluctuations to understanding cultural nuances and local business practices. This session will provide lease administration professionals with essential knowledge and practical strategies to manage international lease portfolios effectively. Attendees will explore key differences in lease structures around the world, compliance considerations, and best practices for streamlining global lease processes. Whether you're expanding into new markets or managing an existing international footprint, this session will help you mitigate risks and improve operational efficiency. This session will be followed by a Breakout Session for follow-up questions and discussion.

## **CO-5, Performing a Lease Audit for Commercial Office and Medical Tenants (I)** **Monday: 10:30-11:30**

This class will walk through the basics of how tenants are overcharged and how to review and audit Commercial Office Operating Expenses for these overcharges. It reviews the types of expenses unique to office leases and shows how to audit the "base year" and "gross-up" clauses and the pitfalls that go along with it. Lastly, this class will identify several areas of possible overcharges that may appear in a landlord's true up statement (reconciliation) and how Tenants can identify them.

Presentation Objectives:

- Understanding the lease auditing process for Operating Expenses in an office lease
- Understand how to audit the Base Years and Gross-ups
- Identify specific overcharges in Operating expenses that you may be paying

## CO-6, Breakout, Global Leases, Local Challenges: Mastering International Lease Administration Follow Up (A)

Monday: 2:30-3:30

## CO-7, Identifying Tenant Mixed-Use Overcharges (I)

Monday: 2:30-3:30

With the rapidly changing real estate landscape comes new ideas and concepts for shopping centers and office properties. Many properties have morphed into lifestyle properties combining traditional retail and office with residential, entertainment, hotels, and fitness centers, among other types. The change towards mix use has created allocations that directly affect the cost tenants pay to the landlords for CAM/ Operating Cost, Real Estate Taxes and Insurance. This class will show the attendee how common area costs in mixed use projects are allocated between the different types of tenants. Lastly, this class will discuss how to spot and audit potential overcharges and bias allocations tenants need to be aware of when reviewing their CAM or Operating Cost Statements.

Objectives:

- Illustrate possible mixed-use situations.
- Demonstrate how bias allocations of expenses in mixed-use occur.
- How to Identify Tenant Overcharges when reviewing for landlord billings.

## CO-8, Understanding REA's and OEA's (E)

Monday: 1:00-2:00

This interactive session will provide an understanding and overview of Reciprocal (or Operating) Easement Agreements (REAs/OEAs) as they relate to occupancy costs and other operational matters. The prevalence of such agreements in varying types of development projects will be visually shown to gain an understanding of how various parties (who may not be part of gross leasable area in your pro-rata share calculation) may contribute to expenses. Key questions will be explored and discussed to better understand how an informed approach to REAs/OEAs can reduce occupancy costs and avoid operational pitfalls.

## CO-9, Defending Against Poor Audit Rights (I)

Tuesday: 10:30-11:30

As we move through the everchanging commercial real estate environment, both landlords and tenants are feeling the economic squeeze. As tenants scrutinize their occupancy cost for overcharges, Landlords are fighting harder than ever to avoid requests to support billed expenses and lease audits. This class explores the types of landlord defenses commonly used to delay and deflect tenant requests and what options are available to respond to such defenses.

Presentation Objectives:

- Statute of Limitations

- Audit Right Restrictions
- Non-Disclosure Agreements (NDA's)
- Estoppels
- Doctrine of Latches
- Duck and Dive Approach (Silence)
- Landlord Sells Property (Who's responsible Old Landlord vs. New)



## Professional Development (PD)

### PD-1, Bringing Your "A Game" (I)

Monday: 10:30-11:30

Discover how to think and act in ways that help you bring your "A Game" to everything you do. Learn to work smarter—not harder—while increasing your job satisfaction and delivering strong results through emotional intelligence, self-management, strategic planning, and self-care.

### PD-2, Driving Your Development (I)

Monday: 1:00-2:00

Don't wait in the backseat—take the wheel of your professional growth. Learn key development strategies, including self-reflection, seeking feedback, applying the 70-20-10 model, aligning learning with goals, and creating SMART action plans to move forward with purpose.

### PD-3, Building Trust (E)

Monday: 2:30-3:30

Trust is the foundation of strong relationships, effective teams, and successful organizations. Explore actionable strategies for building trust using the ABCD model: Able, Believable, Connected, and Dependable.

### PD-4, Growth Mindset (E)

Tuesday: 9:00-10:00

The key to long-term success lies in cultivating a growth mindset. Learn the difference between fixed and growth mindsets, how to shift your thinking, and how adopting a growth mindset can lead to better outcomes and ongoing development.

### PD-5, Navigating Change (I)

Tuesday: 10:30-11:30

Change is inevitable—and essential for growth. This workshop explores the Change Cycle and the CAPE model, offering practical tools to navigate transitions, build resilience, and support others through change.

### PD-6, The Power of Multi-Generational Teams (I)

Tuesday: 1:00-2:00

Our generational differences can be a source of strength. This session explores generational characteristics and how to turn potential challenges into opportunities for creativity, collaboration, and innovation within your team.

## PD-7, Making Hybrid Work, Work (E)

Tuesday: 2:30-3:30

How can we make hybrid work successful for everyone? This workshop focuses on three essential elements of effectiveness in today's work environment: building meaningful connections, leading and participating in productive meetings, and planning with intention.



## Real Estate (RE)

### RE-1, The Future of Enclosed Malls: An Owner's Perspective on Opportunity, Evolution, and Resilience (E)

Monday: 10:30-11:30

Join us for a deep dive into how mall owners and operators are rethinking the enclosed mall format—and uncovering value in the process. As consumer behavior evolves and retail headlines continue to shift, the traditional mall is being redefined, not replaced. This session will explore how landlords are navigating this transformation by leveraging historical context, embracing today's market dynamics, and executing adaptive strategies to reposition assets for long-term success.

Through real transaction data, market insights, and first-hand owner experience, this session will challenge outdated narratives and highlight how malls—once thought to be in decline—are proving resilient, investable, and vital to the next era of retail.

### RE-2, The Rebirth of Tenant Space (E)

Monday: 1:00-2:00

This course will explain how acquiring retail leases through bankruptcy proceedings can serve as a strategic growth vehicle for retailers seeking to expand efficiently. It will cover the mechanics of lease assumption and assignment, the role of the bankruptcy court, and how these deals are often priced below market with limited upfront investment. We will compare this process to traditional site selection and leasing methods, highlighting both the advantages and challenges unique to bankruptcy acquisitions. The session will provide insight into how savvy operators use this strategy to secure high-quality locations and accelerate growth.

### RE-3, Breakout, The Nuts and Bolts of Build-to-Suit (E)

Monday: 1:00-2:00

## RE-4, Practical Applications of AI in Real Estate Operations (E)

Monday: 2:30-3:30

Artificial intelligence is reshaping how real estate teams operate—streamlining daily workflows, improving decision-making, and unlocking insights that were previously buried in documents and data silos. This session will cut through the hype and focus on practical, real-world ways AI can support teams across lease administration, site selection, construction, space planning, finance, and negotiation.

We'll explore how real estate, operations, and finance teams are using AI to:

- **Extract structured data** from leases, invoices, architectural plans, spreadsheets, and other real estate documents with industry-leading accuracy
- **Automate core workflows** like invoice ingestion, CAM reconciliation, lease accounting, and payments
- **Ask plain-English questions** about specific documents, locations, or entire portfolios—and get answers instantly
- **Track obligations, set alerts, and generate reports, dashboards, or presentations** without relying on manual data pulls
- **Analyze and compare construction bids** using historical pricing benchmarks to identify outliers and cost-saving opportunities
- **Build detailed project timelines and budgets** from unstructured construction and vendor documentation
- **Evaluate space utilization** by identifying patterns in productive vs. non-productive locations—and highlight outliers in layout, size, or performance
- **Support negotiations** by equipping teams with instant access to historical deal terms, location comps, vendor performance, and cost trends

Whether you're working in lease administration, development, facilities, or finance, this session will give you a grounded, actionable understanding of how AI can streamline operations, enhance strategic visibility, and help your team move faster with greater confidence.

## RE-5, Leveraging Capital Markets to Negotiate Lease Renewals (I)

Monday: 2:30-3:30

This course equips retail tenants with the knowledge and strategies to use Capital Market conditions to their advantage in lease renewal negotiations. By understanding how economic trends impact landlords' financial positions, tenants can better position themselves to secure favorable lease terms. Key topics include Capital Market motivators such as property sales, refinancing, and economic volatility, along with the impact of lease renewals on property valuation.

## RE-6, Sales Forecasting & Market Planning (A)

Tuesday: 9:00-10:00

The dreaded "retail apocalypse" is turning out to be something of a retail renaissance and while the role of the physical store has evolved it is still the critical component to the customer's journey and long-term brand success. To be successful, brands need to plan at the market level and have high confidence in sales forecasting at the store level. This discussion looks to explore how brands can leverage sales forecasting and market planning to enhance their physical distribution strategies.

## RE-7, Lease Negotiations – The First Step in Real Estate Success (B)

Tuesday: 9:00-10:00

Effective lease negotiation is the foundation of a successful real estate transaction. This course is designed for professionals looking to strengthen their negotiation skills and understand the critical role leasing plays at the outset of any occupancy strategy.

Participants will explore key deal terms, negotiation strategies, and the interplay between legal, financial, and operational considerations. The session will cover how to align lease terms with business goals, identify common negotiation pitfalls, and build productive landlord-tenant relationships from day one.

Whether you're new to leasing or looking to sharpen your skills, this session provides the tools and insights needed to approach lease negotiations with confidence and clarity.

## RE-8, PANEL, Building the Future: Navigating Construction Costs (E)

Tuesday: 10:30-11:30

Join us for an insightful panel discussion focused on the complexities of construction costs in our current world. This session will cover various aspects including:

1. **Current Trends:** Understanding the landscape of construction costs in real estate, including regional variations and factors driving changes and real-world examples.
2. **Relationship Management:** Managing contracts and underlying relationships when rising costs and other economic factors impact high-quality and timely delivery
3. **Budgeting and Forecasting:** Best practices for accurately budgeting construction projects, considering material costs, labor, and unexpected expenses.
4. **Future Predictions:** Insights from industry leaders on what to expect in the coming years regarding construction costs and real estate development.

## RE-9, Advanced Lease Negotiations – Driving Strategic Real Estate Outcomes (A)

Tuesday: 10:30-11:30

This advanced session is designed for experienced professionals looking to deepen their negotiation expertise and drive more strategic outcomes in lease transactions.

Building on foundational principles, the course will explore high-level negotiation tactics, complex deal structures, and how to navigate challenging scenarios involving co-tenancy, exclusives, kick-out clauses, termination rights, and landlord concessions. Attendees will also learn how to leverage market data, manage competing interests, and craft lease terms that align with long-term portfolio strategies.

Real-world case studies and interactive discussion will equip participants with the insights and tools needed to lead negotiations that deliver measurable business value.

## RE-10, PANEL, A Landlord Perspective Behind the Deals (E)

Tuesday: 1:00-2:00

Join several of our Landlord colleagues for an in-depth panel discussion on current issues or concerns in our shared world of real estate. Come hear a different perspective on issues that we are all navigating through today and some of the reasons why different decisions are reached and the thought processes behind them. Come prepared to have honest, friendly conversations with our partners in real estate.

## RE-11, Disaster Events (E)

Tuesday: 1:00-2:00

In this comprehensive course, tenants will learn essential skills and strategies for preparing for and responding to various disaster events. The curriculum covers the following key topics:

- **Understanding Different Types of Disasters:** Explore natural disasters (hurricanes, floods, earthquakes) and man-made events (fire, gas leaks, civil disturbances).
- **Creating an Emergency Plan:** Learn how to develop a personalized emergency plan for your household, including communication strategies and exit routes.
- **Disaster Supplies and Kits:** Discover necessary supplies to have on hand and how to assemble a disaster supply kit tailored to your needs.
- **Safety Protocols:** Receive guidance on safety procedures during different disaster scenarios, such as shelter-in-place and evacuation strategies.
- **Tenant Rights and Responsibilities:** Understand the legal aspects of tenancy in the context of disasters, including landlord obligations and tenant protections
- **Community Resources and Support:** Identify local resources, including shelters and assistance programs, available to tenants during times of crisis.

By the end of the course, participants will feel equipped to face disasters confidently, ensuring their safety and well-being in any emergency. Join us for this invaluable opportunity to empower yourself and your community!

## RE-12, Letters Of Intent: Templates & Negotiation (B)

Tuesday: 2:30-3:30

Leases usually begin with a Letter Of Intent (LOI), which sets forth the basic terms and conditions to be incorporated into a final lease document. Although LOIs are often based on templates and the deal terms in LOIs are generally expressly non-binding, the process of drafting and negotiating LOIs is fraught with hazards for the unwary. Led by a seasoned leasing attorney, this session will guide business and legal professionals through Letters Of Intent, examining terms typically included and pitfalls to avoid.

## RE-13, State of the Retail Market (I)

Tuesday: 2:30-4:00\* (1.5 hour session)

Are you up to speed on the latest trends in the U.S. retail real estate market? What is happening today and how will it influence the future? What trends are “sticky” and what trends are likely to “fade away” with time? How are landlords and tenants responding to shifts in today’s retail market? In this live, fast-paced session, CoStar’s National Director of US Retail Analytics, Brandon Svec, gives you an exclusive, insider look at the current state of the retail real estate market and where it may be headed in the future. Drawing on the vast research and market intelligence of CoStar, Mr. Svec will provide expert commentary to help assess market conditions across an array of industry metrics.

## RE-14, Vandalism and The Unhoused Rights & Best Practices (E)

Tuesday: 2:30-3:30

This essential course aims to educate tenants about vandalism and individuals experiencing homelessness, the implications of both, and effective practices to foster a respectful environment. The curriculum encompasses:

- **Defining Vandalism:** Explore the various types of vandalism, its legal definitions, and its impact on communities and individuals.
- **Legal Rights and Responsibilities:** Understand the rights of tenants and those unhoused, including legal protections against vandalism, and the responsibilities of both parties in preventing and addressing damage.
- **Reporting Vandalism:** Learn how to report incidents of vandalism properly, including engaging local authorities and using community resources effectively.
- **Preventive Measures:** Discuss practical strategies to prevent vandalism, such as fostering community engagement, neighborhood watch programs, and positive interactions.
- **Conflict Resolution:** Gain skills in conflict resolution and communication to address tensions between tenants and the unhoused in a constructive manner.
- **Community Support Strategies:** Identify ways to support the unhoused while ensuring tenant security, fostering mutual respect, and promoting understanding.

By engaging in this course, participants will build awareness, enhance communication, and promote a safer, more inclusive community. Join us to learn how to navigate the challenges of vandalism while respecting everyone’s rights!

## RE-15, Strategic Site Selection to Maximize Results (A)

Tuesday: 2:30-3:30

Attendees will gain insights into various critical aspects of site selection. They will explore current and future market conditions, enabling them to make informed decisions. The course will also cover portfolio assessment techniques and market analysis methods to identify optimal locations. Participants will learn about effective expansion strategies and the role of contemporary technology in site selection. Additionally, understanding landlord dynamics and mastering brokerage and negotiation skills will be emphasized, equipping attendees with the tools necessary for successful site selection.

## RE-16, Unlock Insight. Expand Your Perspective. Real Estate: Industry Access Session (E)

Wednesday: 10:30-11:30

Step into the conversation with some of the commercial real estate industry’s most experienced voices.

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Whether you’re exploring the field, refining your expertise, or navigating a complex challenge, these Q&A-style sessions offer a space to ask questions, gain clarity, and deepen your understanding—no pressure, no pretense.

**Real insight. Real people. Real impact**



## Technology (TT)

## TT-1, Mastering Microsoft Word (E)

Monday: 10:30-11:30

Sharpen your Microsoft Word skills and unlock new tools to work more efficiently. Topics include: fixing line spacing, navigation tools, selecting and formatting text, using AutoCorrect, creating tables, and automating tasks with macros.

## TT-2, To AI or not to AI – That is the Question (E)

Monday: 1:00-2:00

All the buzz today is about AI – Artificial Intelligence. ChatGPT; Microsoft CoPilot. But what does it really do and how can it best be used to maximize efficiency and productivity in your workplace? This session will explore some of the background of what AI really is and what it can and cannot do for you.

## TT-3, Optimizing Outlook (E)

Monday: 2:30-3:30

Streamline your email workflow with powerful Outlook shortcuts and features. Topics include: creating, sending, replying to, and forwarding emails efficiently; using BCC; customizing views; setting up signatures and Quick Parts; organizing with folders, categories, and filters.

## TT-4, Excel Essentials – Segment 1 (E)

Tuesday: 9:00-10:00

Kick off your Excel mastery with foundational skills and keyboard tricks. This session covers: key concepts, navigating and highlighting data, Freeze Panes, formulas (including RCR), and the Fill feature.

## TT-5, Excel Essentials – Segment 2 (E)

Tuesday: 10:30-11:30

Continue building your Excel expertise by exploring formatting techniques, separating and combining data, and advanced keyboard shortcuts to boost your productivity.

## TT-6, Excel Essentials – Segment 3 (E)

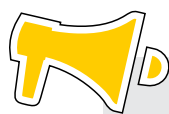
Tuesday 1:00-2:00

Discover more advanced Excel tools and tips. Learn about conditional formatting, when not to use Tables, creating and managing PivotTables, and organizing your workbook with sheet tabs.

## TT-7, Excel Essentials – Segment 4 (E)

Tuesday: 2:30-3:30

Wrap up your Excel training with core data analysis tools. Explore sorting, filtering, using Find/Replace, and building logical formulas with IF statements.



## MARK YOUR CALENDARS!



### Boys & Girls Club Partnership:

Sunday morning, Sept. 28.  
An awesome opportunity for impactful service — as well as a chance to network with peers.

### A First! Monday Morning 5K:

Kick off the work week with a fun 5K run with the NRTA Family!

### Another FIRST! Yoga Session:

Perfect for office workers! Recharge with our general yoga session in the Exhibit Hall Monday at 12:30 PM.

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**See you in Tucson! Sept. 27-30, 2026**

**NRTA CONFERENCE 2026**