



RUBICON  
INVESTMENTS

## CASE STUDY

*Leveraging technology to help a small, nimble team acquire and develop a strong portfolio of holdings with long investment grade tenants.*

### THE PROBLEM

In commercial real estate, it is common for a small team to manage hundreds of millions of dollars in assets. Juggling so much with so few requires smart people using the right tools.

Even when leveraging consultants and external auditors, coordinating and managing the additional help can devour resources.

### THE SOLUTION

LoanBoss works as a resources multiplier for Rubicon Investments. It allows them to feel secure that they are meeting their loan commitments without spending the time to track each loan manually.

By giving outside auditors limited access to LoanBoss, Rubicon stays on top of lender compliance with minimal time and effort.

*“The cost of LoanBoss is basically a rounding error. It is well worth the spend.”*

- Daniel Bunn, **Rubicon Investments** ”



## OVERVIEW

Rubicon Investment’s multi-generational platform brings a solid track record of successful development, investing and entrepreneurial spirit. They have significant in-house experience in deal sourcing, development, re-development, finance and management. This expertise, combined with their innovative, collaborative process, has provided excellence and value throughout their projects. They focus not just on strong returns, but also on strengthening the communities where their projects reside.

A focus on long-term investments with investment grade tenants has led Rubicon to build expertise in government, healthcare and brownfield developments. They have the ability to assist in the budgeting and capital planning for facilities and manage facilities in a way that exceeds tenant expectations.

## THE LOANBOSS EDGE

LoanBoss helps maximize value from CRE loans and lender relationships by giving you complete control over and knowledge of your loan documents. It helps provide lenders the transparency they need while minimizing expenses and making decisions that unlock ROI.

- > Loan abstraction and digitization provides searchable, digital loan documents so that you can get the information you need without digging through legalese.
- > Accurate, real-time event calculations and notifications make sure you never miss a deadline or breach a covenant.
- > Automated lender reporting replicates internal reports and arms you with one-click insights into your recourse exposure, refi opportunities and more.



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