



CERVITUDE

Real Estate Fund Investor Relations Checklist

- ✓ Ensure all quarterly and annual reports meet SEC compliance standards.
- ✓ Provide investors with timely updates on acquisitions, distributions, and portfolio performance.
- ✓ Implement an outbound investor engagement strategy (calls, voicemails, follow-ups).
- ✓ Maintain an accessible IR website with disclosures, FAQs, and performance highlights.
- ✓ Develop and maintain an investor-ready pitch deck and one-pager for fundraising.
- ✓ Build transparency into communications – explain both positive and negative portfolio news.
- ✓ Utilize scenario-based financial models to demonstrate fund resilience.
- ✓ Adopt a CRM to track investor interactions and automate communications.
- ✓ Schedule webinars or investor calls for quarterly portfolio updates.
- ✓ Partner with an IR call center to strengthen investor communication and outreach.