



CONFIDENTIAL WORKING DOCUMENT

Institutional Property & Portfolio Assessment

A structured intake for Title 24, CapEx, physical resiliency, and investment diligence conversations.

HOW TO USE THIS ASSESSMENT

- 1 Complete the fields you can; leave unknown items blank.
- 2 Use portfolio-level answers unless a property-specific review is requested.
- 3 Attach available records only when appropriate for the engagement.
- 4 Save a copy before sending it to DADA AI.

SUBMISSION

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CONSULTATION

01**ORGANIZATION AND DECISION CONTEXT**

ORGANIZATION / FUND / OWNERSHIP ENTITY

ASSESSMENT DATE

PRIMARY CONTACT

TITLE / ROLE

WORK EMAIL

PHONE

PORTFOLIO TYPE

PORTFOLIO SIZE

PRIMARY MARKET

ADDITIONAL MARKETS / JURISDICTIONS

02**REVIEW TRIGGER**☐ Acquisition diligence☐ Refinance or lender review☐ Planned CapEx program☐ Risk committee review☐ California Title 24 project☐ Insurance or resiliency review

OTHER TRIGGER OR TRANSACTION CONTEXT

DECISION / COMMITTEE / CLOSING DEADLINE

REQUESTED OUTCOME

03

PROPERTY OR REPRESENTATIVE ASSET

PROPERTY / ASSET NAME

INTERNAL ASSET ID

STREET ADDRESS

CITY, STATE, ZIP

AUTHORITY HAVING JURISDICTION

YEAR BUILT

LAST MAJOR RENOVATION

GROSS SQUARE FEET

STORIES / UNITS

OCCUPANCY STATUS

PROJECT STAGE

04

ASSET CLASSIFICATION

☐ Office☐ Multifamily / housing☐ Healthcare☐ Retail☐ Industrial☐ Mixed-use☐ Hospitality☐ Other

KNOWN CONSTRUCTION TYPE / STRUCTURAL SYSTEM

KNOWN SEISMIC, HISTORIC, OR REGULATORY DESIGNATIONS

PROPERTY CONTEXT AND KNOWN CONSTRAINTS

05

PLANNED SCOPE

☐ HVAC replacement or controls

☐ Lighting or controls

☐ Envelope / fenestration

☐ Electrical distribution

☐ Water heating

☐ Solar / storage

☐ Structural / seismic

☐ Other project scope

ANTICIPATED CAPEX RANGE

Select one

TARGET START / COMPLETION

PERMIT / ENTITLEMENT STATUS

Select one

KNOWN CODE CYCLE / EFFECTIVE DATE

06

AVAILABLE COMPLIANCE EVIDENCE

☐ Plans / specifications

☐ Title 24 forms or calculations

☐ Permits / correction notices

☐ Acceptance testing records

☐ Controls sequences / points list

☐ Utility or interval data

ARCHITECT, ENGINEER, CONTRACTOR, CONSULTANT, OR AUTHORITY CONTACTS

KNOWN TITLE 24 ISSUES, DOCUMENTATION GAPS, OR PROJECT QUESTIONS

07

THREE-PILLAR REVIEW

A

PHYSICAL SAFETY & STRUCTURAL RESILIENCY

☐ Records available ☐ Professional review needed ☐ Near-term CapEx priority

CONDITIONS, EVIDENCE, OPEN QUESTIONS, OR DEPENDENCIES

B

HVAC EFFICIENCY & TITLE 24 BRIDGE

☐ Records available ☐ Technical review needed ☐ Near-term CapEx priority

CONDITIONS, EVIDENCE, OPEN QUESTIONS, OR DEPENDENCIES

C

ON-PREMISES GOVERNANCE ENGINE

☐ Controls records available ☐ Architecture review needed ☐ Near-term governance priority

CONDITIONS, EVIDENCE, OPEN QUESTIONS, OR DEPENDENCIES

CROSS-PILLAR DEPENDENCIES OR SEQUENCING CONCERNS

08**DECISION USE AND REQUESTED DELIVERABLE**☐ Investment committee☐ Lender diligence☐ Risk committee☐ Insurance review☐ Asset business plan☐ Project team coordination**QUESTIONS THE DILIGENCE BRIEF SHOULD ANSWER****DOCUMENTS AVAILABLE NOW OR EXPECTED LATER****09****CONTACT PREFERENCES AND AUTHORIZATION**☐ Email☐ Phone☐ SMS / text message

☐ I agree to receive text messages from DADA Asset Intelligence at the telephone number provided regarding my inquiry, scheduling, and related services.

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☐ I confirm that I am authorized to provide the information in this assessment for preliminary review.

AUTHORIZED REPRESENTATIVE NAME**TITLE / ROLE****TYPED SIGNATURE****DATE**