HERITAGE VENUE

Valuation+
EXECUTIVE TEAM

About Heritage

Formed in 2010, Heritage uniquely focuses on bridging knowledge and communication between institutional investors and operating companies across both the real estate and middle market sectors. Our team's experience in both fund management and running operating companies benefits clients with proprietary knowledge and ability to perform deep dive analysis on operations and performance of portfolio companies. Valuation**+** encapsulates this knowledge with robust, stand-alone reports that are intended to provide the reader with a comprehensive understanding of any investment's historical performance and current status. Performance projections are supported with extensive market research, operations analysis, and Heritage's proprietary market intelligence. ***As a result, our work processes and valuation products drive confidence for both internal and external stakeholders while reinforcing clients' audit and compliance functions.***

For 15+ years, Heritage has served as a trusted advisor to funds ranging from $100M to $20B+ AUM. *Valuation**+** Reports* enhance asset surveillance, providing objective and transparent representation of investment performance. Further, Valuation**+** clients benefit from our Heritage Growth product, where we engage directly with operators to expand operating businesses and real estate portfolios, providing proprietary market intelligence. Our focus on granular details alongside broader market trends allows Valuation**+** to serve as a value-add for asset managers rather than just a straightforward modeling exercise to check a valuation box.

Andrew Tumilowicz, Partner
M&A, Strategy & Structure

With over 25 years in real estate and middle market operating companies, Andrew has advised, managed or built over $5.5B in companies throughout his career. After managing a privately held real estate portfolio for a family office, Andrew moved to a NYC hedge fund initially building out the Asset Management division, ultimately managing $2B+ in global real estate development as Managing Director. As Founding Partner of Heritage, Andrew's contributes a depth of knowledge in complex transactions, structure, and acquisitions.

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Carey Fieldcamp, Partner
M&A, Strategy & Structure,
Financial Modeling & Analysis

Carey brings over 25 years of experience across the financial spectrum. Carey began his career with JP Morgan Chase, where he created valuation models for bank assets including residential and commercial mortgage portfolios and securities, and derivative products. After a decade of trading a global fixed income book at hedge funds, Carey applied his analytical background to structuring complex transactions, both US and off-shore, including commercial real estate. Working with the Heritage team, Carey is responsible, among other things, for developing financial models of operating companies and commercial properties for use in valuation, acquisitions and planning.

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Garrett Bowden, Partner
Business Development

Garrett contributes extensive experience and relationships across the real estate, hotel, and resort industries. His career spans 3+ decades working at leading financial institutions including Chase Manhattan Bank, Cross & Brown (MetLife), and Sumitomo. Garrett's reputation for creative deal design and execution is highlighted by winning The Real Estate Board of New York's "Most Ingenious Deal of the Year" award. At Heritage, Garrett is focused on investor relationships and communications, sourcing Heritage Growth partners, and business development efforts.

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