

# ORVIDA FOR FINANCIAL ADVISORS



## Expand Your Client Offerings with Orvida's Real Estate Expertise

At Orvida, we partner with financial advisors, planners, and coaches to provide specialized real estate expertise that enhances your client offerings—without competing for your assets under management (AUM). Whether your clients need guidance on 1031 exchanges, Delaware Statutory Trusts (DSTs), Tenant in Common (TIC) investments, Opportunity Zone (QOZ) funds, or anything related to commercial real estate, we offer tailored solutions that align with their financial goals.



## Why Partner with Orvida?

### Enhanced Client Service :

- We provide comprehensive real estate solutions that complement your financial planning services. Offer your clients seamless, tax-advantaged strategies for real estate investments without needing to become an expert yourself.

### No AUM Conflict :

- Our advisory services focus solely on real estate placements, not on managing broader portfolios. This allows you to maintain your client relationships while expanding your value proposition with no competition for AUM.

### Expert Guidance :

- With Orvida's experience in both commercial real estate and real estate securities, we bring institutional-quality insights to every client interaction, ensuring your clients receive the highest level of expertise.

## Partner with Orvida Today

Enhance your client offerings and ensure their real estate investments are handled with the utmost expertise. By working with Orvida, you gain access to industry-leading real estate brokerage, consulting, and investment advisory services, all while preserving your AUM.

**Let Orvida be your trusted partner in providing comprehensive real estate solutions for your clients.**

**Daniel Abramowitz, CCIM**  
Founder & CEO at Orvida

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