

OPTIMIZING THE INVESTOR LIFECYCLE



Optimizing the Investor Lifecycle with Cushman & Wakefield

Investing is a dynamic journey of acquiring, building, operating and exiting real asset investments. Cushman & Wakefield has developed a framework to help investors embed sustainability in every phase of this process. Integrating sustainability principles—from identifying responsible acquisition opportunities to enhancing operational efficiency and ensuring thoughtful exits—can amplify returns while aligning with broader environmental and societal goals.

Sustainability is emerging as a key driver of value creation and risk mitigation for investors seeking to maximize returns. By viewing sustainability as a catalyst, not a constraint, investors can position themselves to lead in a rapidly evolving market—where value is measured not only by financial outcomes, but also by impact.

The Four Core Investment Stages

At the center of the investor lifecycle are four primary stages: acquire, build, operate and exit. Each stage presents opportunities to enhance value and mitigate risk, ensuring financial success while adhering to sustainable principles.



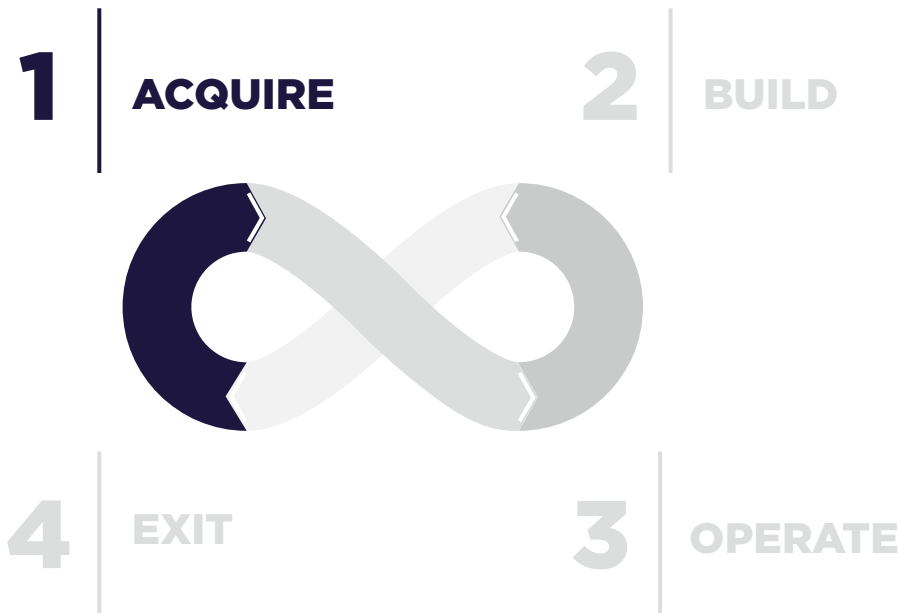
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Stage 1: Acquire Strategic Investment Decisions

For investors looking to expand their portfolios, sustainability-driven acquisition strategies improve long-term viability and resilience. Key considerations include:

- **Sustainability due diligence** – Identify risks and opportunities before purchasing an asset. For example, due diligence may reveal high energy inefficiency, which can lead to inflated operational costs and potential regulatory fines.
- **Asset decarbonization strategy** – Create tailored strategies to reduce an asset’s carbon footprint while optimizing investment returns. This could include upgrading HVAC systems or integrating solar panels to reduce operating expenses and emissions.
- **Target modeling** – Ensure that investors meet sustainability targets while driving continued improvements after acquisition. This may involve investments in energy efficiency, renewable energy, water conservation and enhanced regulatory practices.
- **Future-proofing** – Assess the impact of future trends and regulations on the property’s sustainability performance and its potential exposure to a “brown discount” due to a lack of sustainability features.



STAGE 1

- Capital and valuation advisory
- ESG due diligence, scorecards and benchmarking
- Asset-level sustainability roadmaps
- Climate risk and resilience assessment
- Sustainable leasing programs

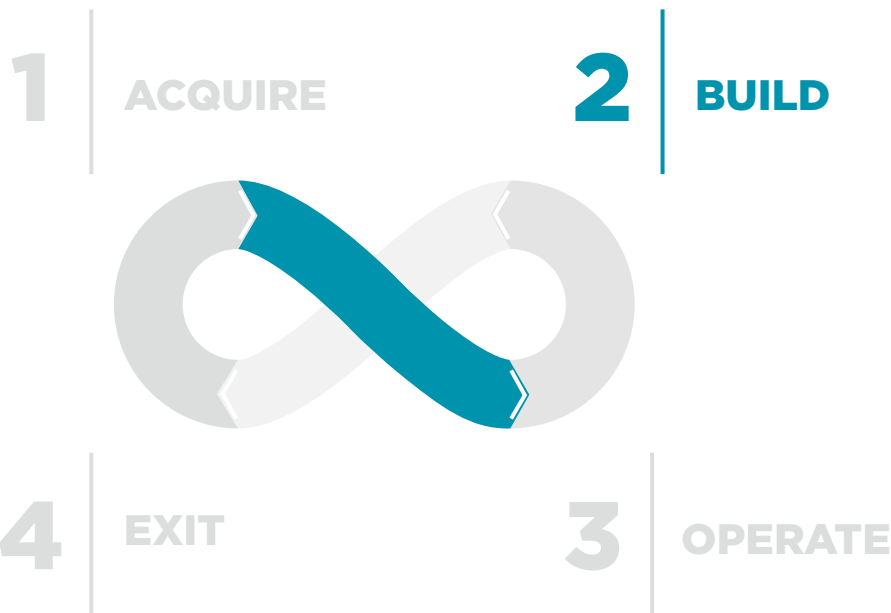
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Stage 2: Build Sustainable Design and Development

Whether constructing a new building or upgrading an existing asset, integrating sustainability principles is essential to future-proof investments. Opportunities include:

- **Sustainable design and construction guidelines** – Develop guidelines to integrate sustainability into asset design and construction, and minimize the lifecycle impacts of the built environment. This may involve selecting low-impact materials, improving air quality systems and integrating smart energy solutions.
- **Sustainable building certifications** – Obtain industry-recognized certifications such as LEED, BREEAM or WELL to demonstrate a commitment to sustainability building practices.
- **Net-zero projects** – Integrate sustainability criteria into capital planning to align assets with net-zero pathways. This includes investing in energy efficiency, electrification and renewable electricity.
- **Sustainability measurement and reporting during fit out** – Ensure buildings meet evolving sustainability standards throughout the fit out process.



STAGE 2

- Sustainability criteria in technical due diligence
- Sustainable design and construction standards
- Sustainable building certifications
- Net-zero project identification and delivery
- Sustainability measurement and reporting during fit out

<https://www.betterbuildingspartnership.co.uk/tools>

<https://cushwake.cld.bz/how-to-retrofit-americas>

<https://www.usgbc.org/leed/rating-systems/new-buildings>

https://www.energystar.gov/buildings/resources_audience/service_product_providers/commercial-new-construction

<https://cushwake.cld.bz/howtopowerbuildingsforanetzerofuture-08-2025-global-central-en-content-esg-realestate>

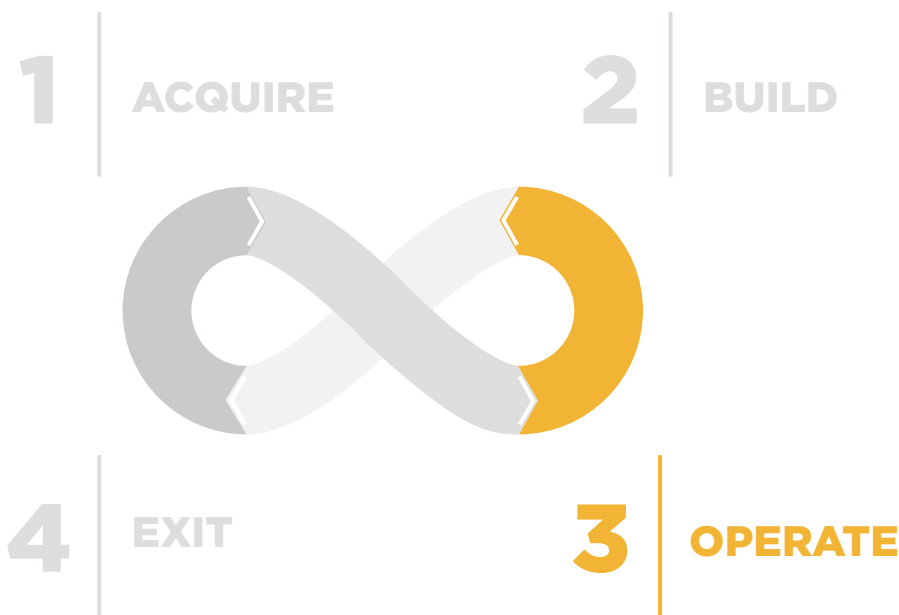
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Stage 3: Operate Optimizing Asset Performance

Once an investor acquires a property, operational efficiency and sustainability are critical for maintaining asset value, attracting tenants and reducing operating costs. Sustainability-driven asset management opportunities include:

- **Efficiency audits and plans** – Complete energy, water, waste or net-zero audits and develop efficiency plans to lower operating costs, minimize environmental footprint and attract tenants.
- **Employee and tenant engagement** – Ensure that occupants actively participate in reducing environmental impact and improving operational efficiency through educational workshops, events, training, and incentive programs.
- **Sustainable building certifications** – Obtain and maintain industry-recognized certifications such as Energy Star, LEED, BREEAM, Fitwel, BOMA or IREM, which can lead to lower operating costs and improved tenant well-being.
- **Sustainability data collection, management and reporting** – Ensure properties meet environmental regulations and voluntary sustainability disclosures by tracking key metrics, including energy consumption, water usage, waste management and carbon emissions. This transparency attracts sustainability-focused investors and strengthens regulatory compliance.



STAGE 3

- End-to-end utility management
- Resource efficiency audits and plans
- Employee and tenant engagement
- Sustainable procurement
- Data collection, management and reporting

<https://www.betterbuildingspartnership.co.uk/responsible-property-management-toolkit>

<https://www.energystar.gov/buildings/resources-audience/service-product-providers/existing-buildings/benchmarking-clients>

<https://cushwake.cld.bz/howtomanagesustainabilitydata-02-2025-global-central-en-content-esg-realestate>

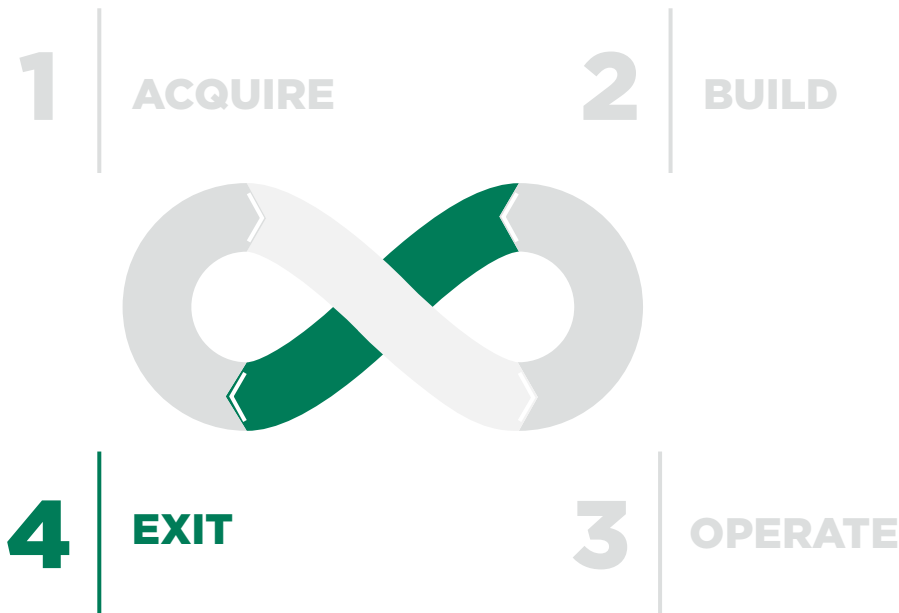
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Stage 4: Exit Maximizing Returns

By embedding sustainability into the exit strategy, assets can stand out in a crowded marketplace and appeal to a broader spectrum of potential buyers, including sustainability-focused investors actively seeking resilient, future-ready assets.

- **Exit-readiness assessment** – Completing a sustainability exit readiness assessment is a powerful way to validate and communicate progress, identify gaps and proactively address buyer expectations. This assessment helps sharpen an asset’s sustainability positioning and showcase its achievements to investors.
- **Repositioning or repurposing plan** – Conduct an in-depth assessment of current performance using qualitative and quantitative scoring against industry benchmarks. This approach helps identify critical areas for improvement and forms the foundation for the value and relevance of your assets.
- **Net-zero assessment** – Proactively assessing carbon risks and opportunities can contribute to a more attractive and smoother exit, potentially leading to better financial outcomes.
- **Sustainability criteria in valuation** – Incorporate sustainability criteria into property valuations, considering factors like energy efficiency, sustainable building certifications and climate risk.



STAGE 4

- Exit readiness assessment
- Repositioning or repurposing plans
- Net-zero assessments
- Sustainability criteria in valuations

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Sustainability at the Heart of the Investment Strategy

Sustainability intersects with every stage of an asset's lifecycle, highlighting the growing importance of integrating responsible investment strategies. These principles not only ensure compliance with environmental standards but also boost financial resilience and long-term asset value. From decarbonization strategies to data collection, sustainability-focused investment services are a crucial component of modern investor decision-making.



The Future of Sustainable Investing

As regulations become more stringent, sustainability is becoming a necessity, not an option. Cushman & Wakefield's investor lifecycle framework provides investors with the tools to acquire, build, operate and exit sustainable assets while ensuring compliance with sustainability standards.

With expertise in real estate, capital markets and sustainability, our experts deliver actionable insights, risk mitigation strategies and long-term value creation. We are an essential partner for investors who understand that adopting sustainability principles can lead to greater financial stability, environmental responsibility and market competitiveness—while contributing to a more sustainable future.

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