View the full edition of Spotlight at: https://www.preqin.com/docs/newsletters/RE/Preqin_Real_Estate_Spotlight_September_2012.pdf

US-Based Insurance Companies

Carla Henry takes a look at US-based insurance companies investing in real estate.

Fig. 1: Key Facts: US-Based Insurance Companies

Average Allocation to Real Estate (% of AUM)	2.1
Average Allocation to Real Estate ($mn)	961

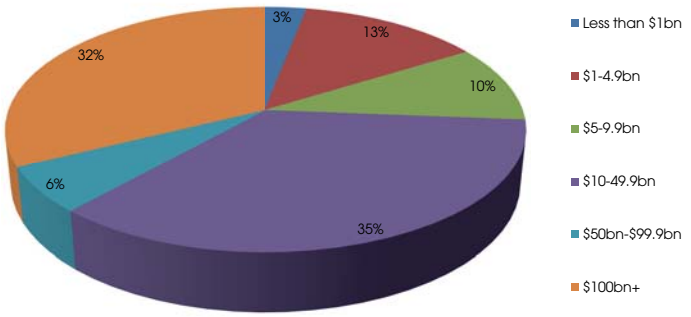
Source: Preqin Real Estate Online

Subscriber Quicklink:

Would you like to see details of 63 US-based insurance companies investing in real estate, including information on their areas of interest, key contacts, future plans and more? Click here to view the full list.

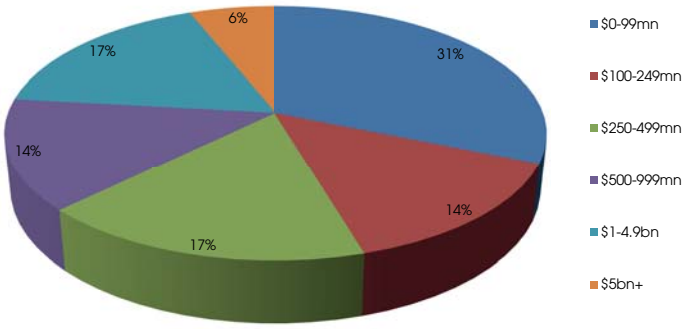
Not yet a subscriber? To see how Real Estate Online can help you, please visit www.preqin.com/reo

Fig. 2: Breakdown of US-Based Insurance Companies that Invest in Real Estate by Assets under Management



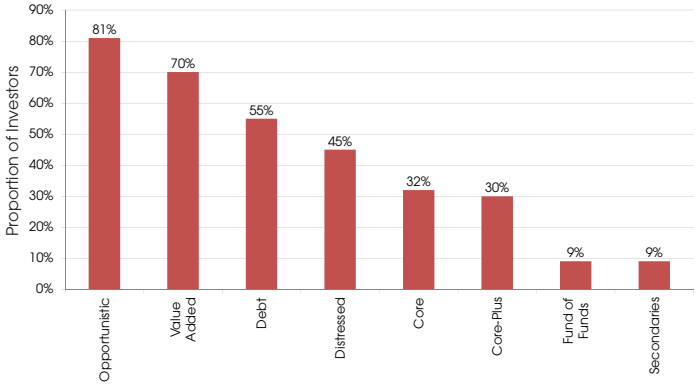
Source: Preqin Real Estate Online

Fig. 3: Breakdown of US-Based Insurance Companies that Invest in Real Estate by Overall Real Estate Allocation



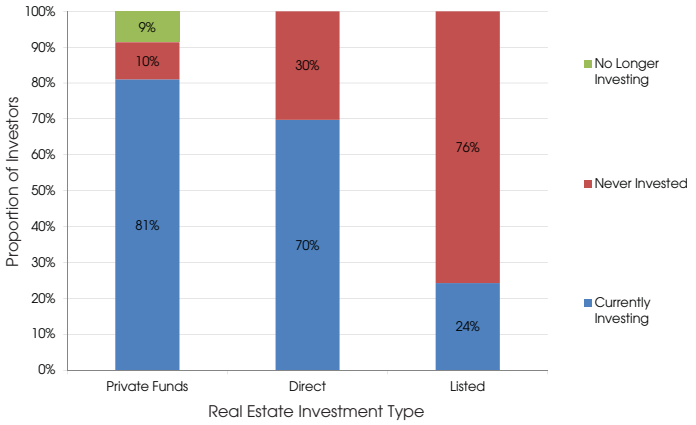
Source: Preqin Real Estate Online

Fig. 4: Fund Strategy Preferences of US-Based Insurance Companies



Source: Preqin Real Estate Online

Fig. 5: Real Estate Investment Preferences of US-Based Insurance Companies



Source: Preqin Real Estate Online

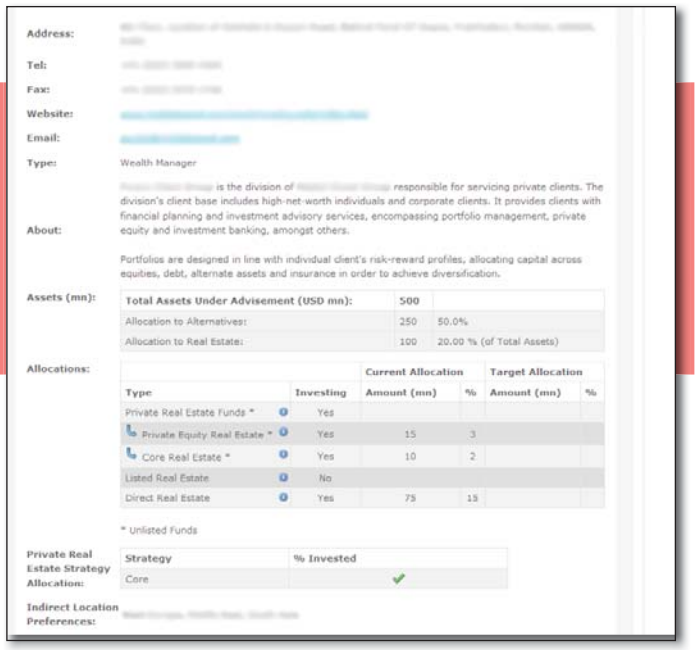
© 2012 Preqin Ltd. www.preqin.com

Wealth Managers in Real Estate

Preqin has now launched coverage of wealth managers involved in the Real Estate, Private Equity, Infrastructure and Hedge Fund asset classes.

Real Estate Online Now Includes:

- Wealth Manager Profiles - constantly updated, searchable profiles of wealth managers and their real estate investment preferences.
- Wealth Manager Contact Details - access the details of wealth managers' key personnel and preferred methods of contact.



Address:

Tel:

Fax:

Website:

Email:

Type: Wealth Manager

About: [redacted] is the division of [redacted] responsible for servicing private clients. The division's client base includes high-net-worth individuals and corporate clients. It provides clients with financial planning and investment advisory services, encompassing portfolio management, private equity and investment banking, amongst others.

Portfolios are designed in line with individual client's risk-reward profiles, allocating capital across equities, debt, alternate assets and insurance in order to achieve diversification.

Assets (mn):

Total Assets Under Advisement (USD mn):	500	
Allocation to Alternatives:	250	50.0%
Allocation to Real Estate:	100	20.00 % (of Total Assets)

Allocations:

		Current Allocation		Target Allocation	
Type	Investing	Amount (mn)	%	Amount (mn)	%
Private Real Estate Funds *	Yes				
Private Equity Real Estate *	Yes	15	3		
Core Real Estate *	Yes	10	2		
Listed Real Estate	No				
Direct Real Estate	Yes	75	15		

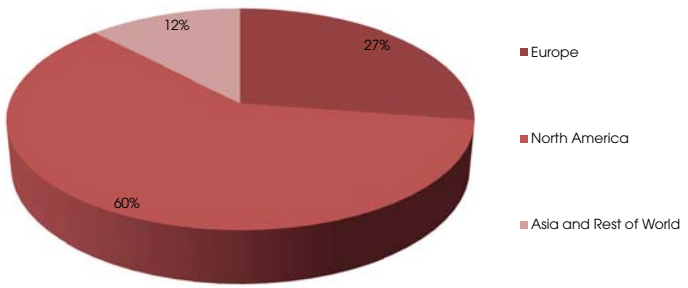
* Unlisted Funds

Private Real Estate Strategy Allocation:

Strategy	% Invested
Core	✔

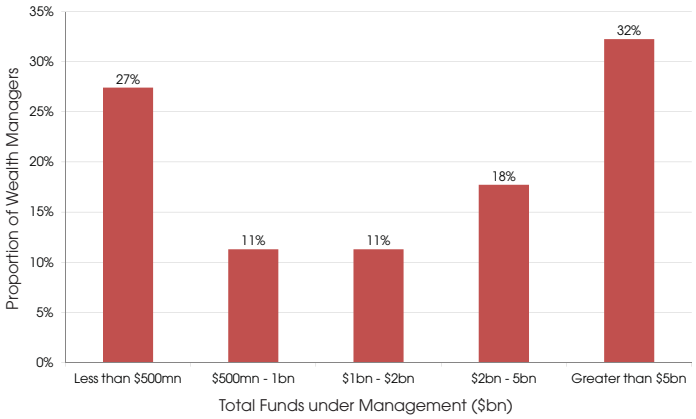
Indirect Location Preferences: [redacted]

Fig. 1: Geographical Location of Private Real Estate Wealth Managers



Source: Preqin Real Estate Online

Fig. 2: Private Real Estate Wealth Managers by Funds under Management



Source: Preqin Real Estate Online

Preqin has also released a complimentary research report, providing insights into wealth managers involved in the alternative assets industry. Download your free copy now:

Wealth Managers Outlook: Alternative Assets

For more information and to arrange a walkthrough of the service, please visit:
www.preqin.com/wealth

© 2012 Preqin Ltd. www.preqin.com