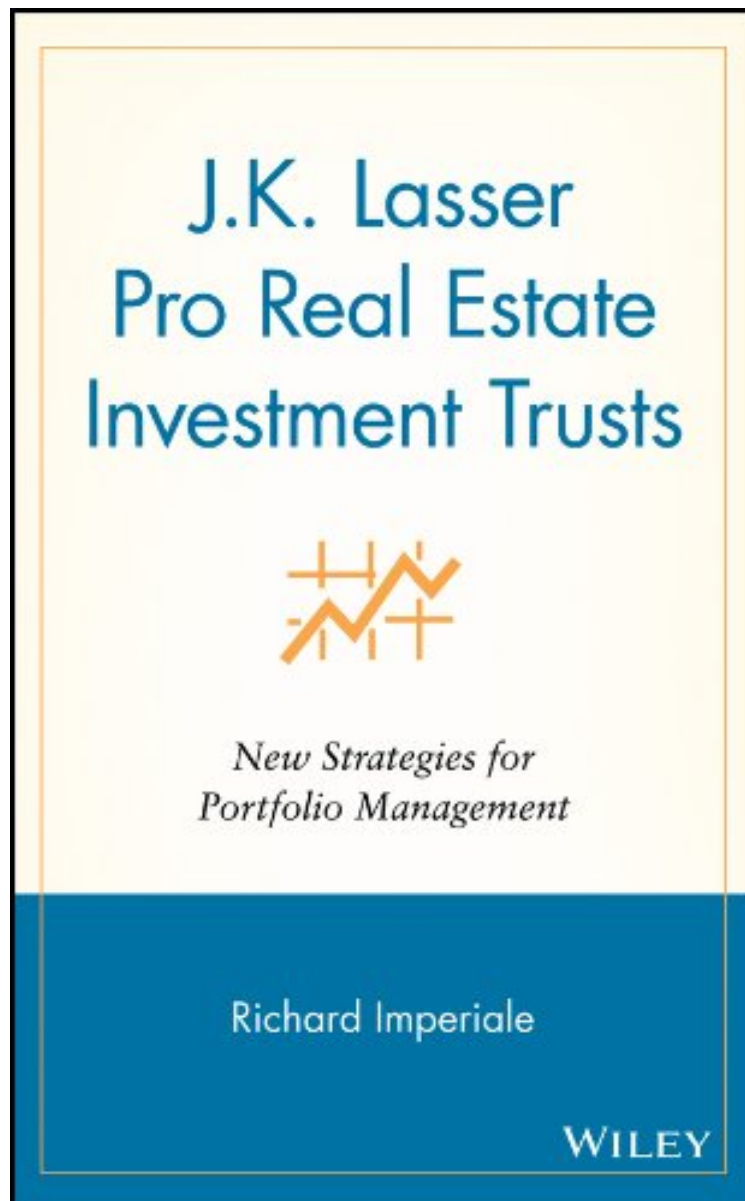



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J.K. Lasser Pro Real Estate Investment Trusts: New Strategies for Portfolio Management (J.K. Lasser Pro.)

Richard Imperiale

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Richard Imperiale : J.K. Lasser Pro Real Estate Investment Trusts: New Strategies for Portfolio Management (J.K. Lasser Pro.) before purchasing it in order to gage whether or not it would be worth my time, and all praised J.K. Lasser Pro Real Estate Investment Trusts: New Strategies for Portfolio Management (J.K. Lasser Pro.):

12 of 12 people found the following review helpful. Excellent Survey of Equity REITS But It Has Limitations. By Susanna Hutcheson This book is an excellent survey of the world of equity REITS. And it does sum up the value of buying each type of equity REIT. But if you're looking for a book which shows you how to invest in REITS and how to analyze the figures of a REIT, this isn't the book. I also was hoping to find information on Mortgage REITS. There was only a paragraph or two on the subject --- certainly not enough information on this topic. This book is geared more toward the analyst or someone with a tremendous amount of experience in REITS. It assumes you have a good background in REIT investing. And it certainly does not cover the entire field of REITS. So it depends upon your needs as to whether or not this book would be a good addition to your investing library. I personally got three bits of information out of it that were worth the cost of the book. But I could have probably gotten the information elsewhere free. Susanna K. Hutcheson Executive Copy Director and Owner Powerwriting.com LLC 0 of 0 people found the following review helpful. Very comprehensive book on REITs By Mariusz Skonieczny REITs are simply publicly traded real estate companies that are involved in owning and managing income-producing properties such as apartments, shopping centers, offices, and warehouses. In order to qualify for REIT structure, these companies have to pay out 90 percent of earnings in dividends. The author argues that REITs should take 5 to 20 percent of every investment portfolio because they offer competitive returns, reasonable volatility, and low correlation with other financial assets. In addition, they have low sensitivity to changing interest rates, act as a hedge against inflation, and offer a tax advantage to certain taxable investors. I liked the chapter on analysis and valuation of REITs where the author states that in order to analyze and value a REIT, you need a blend of conventional real estate valuation (replacement cost, comparable sales, and capitalization methods) and security analysis. I have always been interested in manufactured home communities, so I found it helpful to read a chapter on REITs that involve this property type. - Mariusz Skonieczny, author of Why Are We So Clueless about the Stock Market? Learn how to invest your money, how to pick stocks, and how to make money in the stock market 4 of 4 people found the following review helpful. A Must Read for Financial Planners and Seasoned Investors... By A Customer This is a great guide for the sophisticated investor or financial planner looking to learn more about investing in Real Estate Investment Trusts. Mr. Imperiale outlines the history and characteristics of REITs as well as how investment portfolios can benefit from exposure to REITs. The interviews with successful real estate investment professionals is also very insightful. This is a must read for the skilled investor considering purchasing REITs!

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From the Inside Flap Understanding real estate investment trusts (REITs) as an asset class is important for anyone, whether you're a financial advisor or savvy investor, who deals with investments within a multi-asset class setting. With the "modern era" of REITs upon us, financial experts agree that this unique asset class should be a part of every investor's portfolio. J.K. Lasser Pro Real Estate Investment Trusts thoroughly explains the advantages and benefits of modern REITs—liquidity, low volatility, dividends, professional management, and profits—and reveals how to integrate them into a portfolio to achieve balance and stability. Opening with a discussion of real estate as an investment and a brief history of REITs, this invaluable resource provides a solid starting point for the use of REITs as a portfolio diversification tool. From here, J.K. Lasser Pro Real Estate Investment Trusts will show you how real estate market characteristics, real estate development, and real estate partnerships can affect the overall performance of REITs. Along with a complete review of REITs as an independent asset class and their role in a portfolio, J.K. Lasser Pro Real Estate Investment Trusts provides a detailed look at the different types of REITs, the various property sectors in which they invest, and their investment strategies. Included is information on: Residential REITs Manufactured home community REITs Office REITs Industrial property REITs Retail REITs Hotel property REITs Health care REITs Self-storage REITs This well-rounded guide also provides coverage of advanced financial REIT topics such as paper clip REIT structure and taxable REIT subsidiaries, and includes timely advice from REIT industry experts Sam Zell, Michael Grupe, and many others. The growth of REITs as an asset class has created an opportunity for small investors to participate in the ownership of institutional-quality

real estate. Are you ready to help your clients make the most of this opportunity? To help you navigate your clients through the REIT marketplace, J.K. Lasser Pro Real Estate Investment Trusts explores all the aspects of REITs and gives you the vital information, practical guidance, and necessary tools to meet almost any client's investment needs. From the Back Cover Benefit from the outstanding investment opportunities that currently exist in the REIT industry The growth of REITs as an asset class has created an excellent opportunity for small investors to participate in the ownership of institutional-quality real estate. Are you ready to help your clients make the most of this opportunity? J.K. Lasser Pro Real Estate Investment Trusts thoroughly explains the nature of REITs and explores how this investment vehicle can be integrated and implemented into almost any client's portfolio. This invaluable resource discusses the benefits and performance characteristics of REITs and includes a chapter on each of the following forms of REITs available, including: Residential REITs Manufactured home community REITs Office REITs Industrial property REITs Retail REITs Hotel property REITs Health care REITs Self-storage REITs Specialized, diversified, and mortgage REITs Filled with practical guidance, vital information, and in-depth interviews with some of the most respected individuals in the REIT industry, J.K. Lasser Pro Real Estate Investment Trusts is a valuable road map to an investment vehicle that can help you stabilize and grow any investor's portfolio. Please visit our Web site at www.jklasser.com About the Author RICHARD IMPERIALE is President and founder of Uniplan, Inc., and its affiliates, a Milwaukee, Wisconsin--based investment advisory firm that manages and advises over \$300 million in client accounts. Uniplan specializes in providing clients with consistently superior risk-adjusted returns managing equity, balanced, and specialty portfolios. In addition, Uniplan is the investment advisor to the Forward Uniplan Real Estate Investment Fund.