



Client Success

Cohen Asset Management, Inc.



Market

Industrial

Portfolio

12 million square feet

Client Since

2001

Highlighted Product

[Yardi Investment Manager](#)

The Benefits

By easily compiling and communicating accurate information, Yardi Investment Manager strengthens Cohen Asset Management's investor relationships with superior service and allows the company to maintain a lean organization.

About Cohen Asset Management, Inc.

cohenasset.com

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Yardi.com

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“ Yardi Investment Manager helps us have more meaningful conversations with our investors. ”

Scott McGinness, Principal and Chief Financial Officer

The Company

Cohen Asset Management Inc. is a Los Angeles-based private real estate investment firm with a regional office in Northern New Jersey. With a primary focus being the industrial sector, Cohen Asset Management has an established history as an active owner-operator that is comprised of a team of seasoned real estate professionals who create value for investors by establishing mutually rewarding relationships within the industrial real estate community in each of its target markets, particularly with tenants, brokers, sellers and buyers.

The Challenge

Searching for Information

Many of Cohen Asset Management's investors are involved with over 20 different deals at once. Manually compiling such a diverse amount of complex information into reports was a labor-intensive task, and the company had no efficient way to do it. "Our company president would be in the middle of a call with an investor and would run into my office to ask, 'Which deals is this person in, can you run a report?'" recalled Scott McGinness, principal and chief financial officer for Cohen Asset Management.

The Solution

Yardi Investment Manager

Yardi Investment Manager, the CRM and investor portal solution within the Yardi Investment Suite, compiles Cohen Asset Management's portfolio performance into a single database that gives staff easy access and automatically tracks information on prospects, investors, activities, tasks, correspondence and more.

The Story

Stronger Investor Relationships

Cohen Asset Management's investor relations staff can log into Yardi Investment Manager and see the online tools their investors are using, deals they are involved in, contact information, returns, distributions and other information. Receiving fast, accurate responses to inquiries creates investor confidence and assures them that Cohen Asset Management is fully connected with their accounts.

Cohen Asset Management also streamlined investor correspondence with Yardi Investment Manager, which automates the process of generating customized messages. The company now sends a personalized confirmation after a deal closes that requires



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only minutes of setup. "The correspondence template projects a good, professional image of our company to investors," McGinness said.

Yardi Investment Manager not only saves Cohen Asset Management staff time, it also improves the accuracy and quality of its reporting and empowers a better-informed staff. "By being able to deliver information when it's needed, we don't have to follow up with the investor later, which is easier on both parties," McGinness said. "We get a lot of compliments from investors about our service, and Investment Manager is a major reason for that."

Cohen Asset Management, Inc. has also implemented [Yardi Investment Accounting](#), [Yardi Voyager Commercial](#), [Yardi Advanced Budgeting & Forecasting](#), [Yardi PayScan](#), [CHECKscan](#), [Yardi Maintenance](#), [Yardi Maintenance Mobile](#), [Yardi Orion Business Intelligence](#)