

# Cortexion®

**Achieve Total Mission Success  
at lowest cost and risks**

## **Cortexion's Services**

Cortexion provides execution expertise to make sure your projects achieve total mission success at lowest cost and risk. Cortexion reduces project costs by between 10% and 30%, while maintaining quality, using proven strategies and leadership.

### **Our services range from full program management to individual assignments:**

- 1. Full Program Management:** *unified management of projects from inception to completion*
- 2. Development Planning, Strategy, and Execution:** *reduced costs = better bottom line*
- 3. Project Business and Financial Planning:** *we create and implement project business strategies that match your goals and needs*
- 4. Information Management Technology:** *we provide the most complete business intelligence with real time Key Performance Indicators – creating the visibility needed to manage, lead, and negotiate every project. The technology mechanically reduces costs and risks. The technology provides valuable data for tax savings in cost segregation.*
- 5. Project Administration and Management:** *Total Execution Management*
- 6. Financing:** *We have the expertise and relationships to acquire financing at great rates*

### **Why Cortexion? We produce added value for our clients every time by substantially reducing project costs.**

From project initiation to financing through completion we combine lean strategies and execution that improve our client's results. We combine strategy, technology, and expertise into execution that delivers unparalleled results.

**Our People:** From planning to financing to execution we have a history of improving project results. Our team is highly qualified through experience and education. The team is totally focused on improving our client's results.

**Our Strategy:** A lean Project Execution Strategy incorporates all planning and execution into an integrated and cohesive plan that is designed to achieve total mission success at lowest cost and risk. Cortexion combines expertise in planning, execution, teamwork and leadership with the best tools and technology available.

**Our Technology:** Cortexion provides technology that reduces costs, streamlines operations, and produces factual information *that results in better decision making and execution.* Imagine having a project dashboard that shows you the key performance indicators that allow informed decisions and transparency.

**Your Payoff: Reduced Costs, Reduced Risks, Improved Execution, Guaranteed Results.**

## Engaging Cortexion's Services:

Cortexion reduces project costs by between 10% and 30% using proven strategies and leadership. We are able to produce the greatest savings when involved early in a project. Cortexion will work with you to maximize the value you gain from your projects. During initial meeting Cortexion will provide you with information and strategies that you can use to improve project results.

### Our Incentive:

Our engagement agreements are set up so that our profitability is contingent on your success. In other words our primary incentive is to produce increased value for our clients because that is how we earn profits. Our fees are only be a fraction of the added value we create for you. *Your success is our success.*

### Contact Information:

James Conlow, CEO  
Phone & Voice Mail 510-601-0800  
[jconlow@cortexion.com](mailto:jconlow@cortexion.com)  
[www.cortexion.com](http://www.cortexion.com)

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## 1. Strategy, Planning, and Organization

Cortexion works with clients as they consider moving forward with strategy, planning and execution of their projects. Cortexion works with clients to consider several factors, including:

- Needs: Clients seek advice on how to efficiently satisfy their needs while minimizing costs and risks.
- Goals: Clients seek advice on how accomplish goals.
- Use of Resources: We are engaged by companies and people that are looking for the best use of their resources to maximize value or to achieve other goals. This addresses:
  1. What project(s) should we engage in?
  2. What is the best use of resources?
- Problems: Clients have specific problems and are looking for advice.
- Decision Making: Evaluate circumstances and provide alternatives and decision support. We know how to run the numbers.
- Strategy: Cortexion provides strategic planning that is focused on achieving the clients' missions.
- Project Execution Strategy that will improve the owner's results using lean methods.
- Evaluation: Cortexion provides ongoing evaluation and advice about current plans or upcoming projects.
- Alignment: Align project(s) with current and future business strategy and goals.
- Cortexion provides expert service and advice to help in all of these areas.

- **Please review Cortexion's whitepaper on Project Execution Strategies**

## 2. Investment Consulting, Monitoring, and Management

Investors and financiers lose billions each year in real estate investment due to a limited approach.

The concept of investment management is well defined; however it is typically applied to real estate development without diligent consideration for execution of the development process. This would be like investing in a public company without consideration of its operational abilities.

Cortexion provides complete and unified analysis, diligence, and oversight from initial concepts through completion, resulting in improved investment choices, asset protection, and increased returns.

## 3. Project Business Planning

Cortexion provides strategic planning and business plan development for projects. This is different from the project planning provided by Architects and different from the consulting and planning provided by standard business consultants. We specialize in ensuring that projects make sound business sense. This includes:

- **Analysis of Proposed Projects**
- **Feasibility Study and Analysis**
- **Risk Assessment**
- **Develop and write the overall business plan for one or more projects.**
- **Strategic Planning - Project Execution Strategy**
- **Market Planning**
- **Project Design**
- **Operational Planning:** Schedule, Costs, Risks, Staffing, Execution Strategy
- **Financial Planning and Structures:** Analysis, Pro Forma Financial Models, Financing Plan, Debt structure, Equity structure, Funding Requests – Cortexion can write the funding requests
- **Site Evaluation**
- **Creating and writing the overall business plan** and strategies for core business operations.

## 4. Project Financing

Cortexion helps clients acquire project financing. Cortexion has the experience and the relationships to get any viable project financed at great terms.

- **Prepare or review the project financing docs (the funding request)**
- **Project Business Plan Preparation (or review)**
- **Project Master Plan Preparation (or review)**
- **Project Financials Preparation (or review)**
- **Contact project Financiers – Acquire the Financing (Please talk to us about this)**
- **Negotiate Financing Terms**

## 5. Evaluation and Feasibility Studies of Proposed Projects

Cortexion evaluates projects that clients are considering either from the point of view of investment or direct ownership, this includes:

- **Evaluation of all aspects of a proposed project including risks and potential returns.**
- **Evaluation of Financials:** Cost Estimates, Market Study, Total Project Financials, Potential ROI, Risk, Risk/Return analysis, Leverage
- **Site Evaluation:** Fitness, Zoning, Entitlements, Environmental Investigation, Environmental Planning
- **Project Evaluation:** Is this the right project? Is it a fit for the fund?

## 6. Initial Planning of Projects

Cortexion provides planning services that improve the return and/or reduce risks from projects, this includes:

- **Initial Project Planning:** Evaluate current plans and ideas, Provide initial planning, conceptual planning, and fresh ideas, Provide Project Business Planning
- **Site Management:** Evaluation, Selection, Improvements Required, Manage the entitlement process
- **Risk Management:** Assessment, Evaluation, and Mitigation Planning
- **Financials:** Evaluate Pro Forma financials, Develop, update, or improve Pro Forma financials, Evaluate Cost Estimates and Budgets, Develop Cost Estimates and Budgets, Evaluate Market Potential, Risk/Return Analysis, Financing needs, strategies and structures,
- **Operations Planning:** Project Execution Strategy, Schedule, Costs, Risks, Staffing, Execution

## 7. Pre-Construction Management

Cortexion's pre construction services reduce project costs, mitigate risks and ensure proper planning for a smooth execution of the project.

- Select and build the team.
- Design Management: provide services to improve the Design of a project
  1. Cortexion helps manage the design process making sure that the design is substantially in conformance with the project requirements. Cortexion performs this process by learning the vision and goals of the project as well as the constraints of the project and then working to optimize all elements to achieve the goals at optimal efficiency. Cortexion manages and mitigates the “other” agendas of architects and designers. Cortexion is expert in providing enough oversight and management to optimize the process and keep the schedule moving without interrupting the design process or creativity.
  2. Technology: Cortexion will provide and use technical systems to assist in the management of the design process. These systems provide improved communications, keeping all members of the team on the same page even when working from separate and remote locations.
  3. Design Phase Milestone Schedule
- Interpretation and Communication
- Buildability Analysis
- Value Engineering

- Work Breakdown Structure
- Scheduling and Phasing
- Cost review and analysis
- Review Construction Market Survey
- Project Management Information System: Cortexion shall provide the system for monitoring essential information during project execution.
- Conduct Project Meetings
- Coordinate Communications
- Management and oversight of Procurement and Purchasing
- Management and oversight of project bid process
- Contract Negotiations. Cortexion will assist in negotiating contracts with the selected project's service, equipment and materials providers. Cortexion is expert in assembling construction teams and gaining the best value through collaboration.
- Risk Assessment and Risk Management. Cortexion will provide expertise in optimizing specific Risk management elements of the project.
- Public and regulatory approvals. Cortexion provides expert Construction Managers to interface, coordinate and negotiate with regulatory and governing institutions.
- Historical Design and Construction: Cortexion has specific expertise in project design management as well as interfacing with government agencies to gain greatest advantage on historical projects.

## 8. Project Management

Cortexion's Construction Management services are delivered as a combination of human expertise and technology systems. Cortexion provides the following:

- **Consulting & Management Personnel.** Cortexion provides management expertise during the course of construction. Cortexion can provide:
  1. Contractor selection, oversight, and coordination
  2. Compliance Monitoring
  3. Coordination of field forces, materials and equipment.
  4. Supply Chain management & Logistics. (Planning, Management, Monitoring and Oversight).
  5. Scheduling.
  6. Cost Management, Monitoring, and Control.
  7. Conduct Project Meetings.
  8. Maintain Project Records.
  9. Preparation of reports.
  10. Monitor Permit and Code Compliance.
  11. Claims and Change Order Management / Negotiate Change Orders.
  12. Monitor As-Builts.
  13. Monitor Testing and Inspection for compliance.

### **Benefits Include:**

- Reduce Costs = increased returns
- Reduce Risks
- Improve Compliance
- Reduce Change Orders
- Improve Decision Making
- Transparency
- Improve Compliance Reporting: Any requirement of the funding source, Responsible Contractor Policy, DBE, DVBE and small business participation, Sarbanes Oxley, FDIC
- Cortexion provides and uses the best technology from several providers.
- Cortexion provides and uses the Cortexion technology as follows:

## 9. Technology:

Cortexion employs technology to enhance all aspects of Planning, Execution Management, and Communications. We provide a total Project Organization System. The systems provide web-based and software technology to all participants on a project to produce better execution and project control.

- **Capabilities of the technology:**
  1. Upfront reduction of project costs
  2. Reduction of Risks
  3. Cost Monitoring & Control during construction (in real time)
  4. Schedule Monitoring & Control during construction (in real time)
  5. Cortexion Dashboards and Reports providing Key Performance Indicators (in real time)
  6. Provides visibility and transparency
  7. Increased control and improved execution
  8. Assured release of mechanic's liens
  9. Total Project Accounting
  10. Tax Savings
- **Cortexion will provide Document Control technology with the following capabilities:**
  1. Use web technology to send and receive construction documents.
  2. BIM
  3. Helps keep control providing feedback of who has current sets of construction documents.
  4. Web based Request for Information procedures and control
  5. Web based Shop Drawing and Submittal procedures and control
  6. Web based Change Order procedures and control

## 10. Insurance Program Administration

- Cortexion can provide administration of insurance programs that significantly reduce insurance costs, reduce financial risks and increase returns.

## 11. Funds Control and Disbursements

- Cortexion's Funds Control and Disbursement services are delivered as a combination of human expertise and technology systems.
- Standard Funds Control and Disbursement services:
  1. Specify Contracts and/or contract language for all payees
  2. Open and fund accounts
  3. Receive & Review Invoicing
  4. Manage Lien Releases
  5. Make onsite progress inspections and provide reports
  6. Make disbursements directly to the payees
  7. Provide Total Project Accounting
- **The Cortexion technology system is used for Funds Control and Disbursements:**
  1. All payee participants on a project shall use the Cortexion system for invoicing. This produces: better execution, project control and risk control, Total Project Accounting, Full visibility of the process, Web-based access to project status

## 12. Other Assignments:

- Cortexion has many capabilities not listed herein. As an example we were recently hired to perform supply chain management services for the manufacture of 30,000 new electric automobiles.
- Please contact Cortexion to discuss our other capabilities.

## 13. Why Choose Cortexion?

### **With Cortexion you can be certain of 5 things:**

**1. Your projects will cost less. We guarantee this in writing.**

**2. You will know more.**

From project initiation through completion, Cortexion gathers and delivers the most accurate and complete information about projects – the entire project will be better organized – You will understand what is happening at all times. All project activities will be transparent and you will know the status of all activities through Key Performance Indicators. You will be able to make better decisions. Your project will be negotiated and managed from a position of knowledge and power.

**3. Your risks will be reduced.**

**4. You will have better organization and management.**

- a. From initiation through completion, your projects will be organized and managed using best methods, systems, and technologies.
- b. The factual on-time information provided by Cortexion produces better decisions and management.

**5. You will have a measurably better outcome.**

**Please contact us so we can show you how to improve your bottom-line.**

**Contact Information:**

James Conlow, CEO

Phone & Voice Mail 510-601-0800

[jconlow@cortexion.com](mailto:jconlow@cortexion.com)

[www.cortexion.com](http://www.cortexion.com)