



The value of a connected investment and property management solution

TOPICS EXPLORED IN THIS YARDI EBOOK

- How much siloed property data is costing you
- What changes with an investment-to-property solution
- How connected data builds investor confidence
- Why firms are making the shift now
- Close the gap with Yardi connected solutions



HOW MUCH SILOED PROPERTY DATA IS COSTING YOU

The core objective of real estate investment managers is to oversee investments and maintain strong investor relationships. Yet their success is ultimately linked to how well the underlying assets perform, assets they sometimes don't manage directly.

Many firms outsource property management to **third-party fee managers**, often allowing each operator to run on a different system. Updates arrive as periodic reports, spreadsheets or PDFs. While seemingly flexible, this approach introduces risk that compounds with every reporting cycle:

- Without real-time visibility into asset performance, strategic decisions slow down.
- Aggregating data manually is time-consuming and prone to error, creating reporting inconsistencies and delays.
- When investors ask about performance, your team is left chasing answers across multiple sources.

A **single system** for **fee and investment managers** eliminates these blind spots. It provides transparency from investor reporting down to individual leases, reduces operational costs and removes reconciliation bottlenecks. This enables investment managers to focus on strategy instead of manual workflows.



JACE SWANK
SENIOR DIRECTOR
Yardi

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The real cost of disconnected systems isn't just inefficiency. Without direct visibility into property operations, investment managers are making decisions based on data that's already outdated.



WHAT CHANGES WITH AN INVESTMENT-TO-PROPERTY SOLUTION

When fee managers operate on the same platform as the investment manager, the entire relationship dynamic changes. Data no longer arrives in periodic reports, it's live and readily available. Here's what it looks like in practice.

When investment and property data live in **one system**, **data integrity** is maintained throughout the reporting cycle. This streamlines the close process and improves reporting accuracy because numbers no longer need to be consolidated from multiple sources.

This also means that when new fee managers come on board, they step into a **standardized environment**. Property records remain intact and accessible, eliminating the risk of losing historical data.

The connectivity gives asset management teams **direct visibility** into property data, facilitating more informed discussions with fee managers and timely, proactive decisions. Manual data processing is replaced with **automated workflows**, freeing teams to redirect time toward higher-value activities.

That consistency extends to the **tenant experience**. Residents and tenants across all properties interact with the same apps and follow a standardized onboarding process, reinforcing brand identity regardless of which fee manager operates the asset.

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JOE BIDDLE
DIRECTOR
OF INFORMATION TECHNOLOGY
ABR Capital Partners

With Yardi, all the work can be in the hands of the data owners—the accountants, the fund management team—who work directly with the data and can validate it.



HOW CONNECTED DATA BUILDS INVESTOR CONFIDENCE

Moving to a connected system has a direct impact on **investor relationships**. Today, investors have moved beyond simply reviewing returns. They expect access to asset-level operations on their own terms and timeline.

Real-time access to property data enables investment managers to quickly address investor questions, building trust through speed and accuracy. A unified system also gives investors a single destination for portfolio performance, capital activity and periodic reports.

MG Properties saw these benefits firsthand after **adopting the Yardi Investment Suite** for their investment and asset management operations. Anyone on their team can pull up complete investor activity through the platform and respond to inquiries immediately.

The connected environment also helped MG Properties grow strategically. By delivering faster, more transparent service, the firm strengthened existing relationships and attracted new investors, expanding its portfolio without adding operational complexity.

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JOE ANFUSO
CHIEF FINANCIAL OFFICER
MG Properties

Integrating investment and asset management into one platform allowed us to expand our portfolio by 75%, cut our quarterly distribution process from 7 weeks to 2 weeks, and therefore, increase our investor base by 350% without adding more staff.



WHY FIRMS ARE MAKING THE SHIFT NOW

As **AI-driven real estate tools** continue to evolve, integrated data becomes a necessity. With 87% of investment professionals **reporting increased technology budgets** driven by AI over the next two years, the cost of fragmented data will only grow. A connected system ensures the consistency AI requires to deliver insights that siloed operations cannot.

At the same time, the 2025 expansion of the **NCREIF PREA Reporting Standards** now recommends asset- and investment-level reporting fields. This includes enhanced transparency in valuations and expenses, a level of visibility disconnected systems struggle to deliver.

With private real estate fundraising **up 24% year-over-year** through the first nine months of 2025 and fund structures growing more complex, the operational cost of fragmented data is compounding faster than most firms realize.

For companies considering this transition, **data security** is often a key concern, especially as the **SEC's 2026 priorities** increase scrutiny on data integrity. In practice, firms are making the shift successfully, with built-in safeguards protecting PII and confidential data across multi-party environments.

Another consideration is **system maintenance**. With cloud-hosted platforms, ongoing management can be handled by the technology provider, eliminating the need for dedicated in-house staff.

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CHRIS BARBIER
SENIOR DIRECTOR
Yardi

Investment managers who consolidate their property data onto a single platform aren't just solving today's problems. They're building the data foundation that every future innovation, including AI, will depend on.



Yardi offers a **fully integrated solution suite** for investment and asset management across both **multifamily** and **commercial** portfolios.

Rather than connecting separate tools, the platform is built as a single environment for investment management, property operations, accounting and budgeting, providing oversight across the full asset lifecycle:

- Investment managers gain real-time visibility into asset performance without waiting for fee manager reports.
- Ownership accounting and investor reporting draw from the same data, eliminating reconciliation.
- Live property data flows directly into valuation, forecasting and construction tools, supporting proactive decisions.
- Standardized workflows enable operational best practices, helping drive stronger NOI and long-term asset value.

For investment managers who outsource property management, Yardi Investment Suite closes the gap between **your operations and your operators**. The result is a portfolio that feels fully in-house, no matter how many operators are behind it.

See how **Yardi**[®] helps you connect every asset, operator and investor on a single platform.

 yardi.com/investment-suite | sales@yardi.com or (800) 866-1144