



Vivid Vision 2024

Snapshot

The following is our Vivid Vision. Creating a Vivid Vision brings the future into the present, so we can have clarity on what we are building now. It is a detailed overview of what our company will look like, feel like, and act like three years out—by December 31st, 2024.

It's December 31st, 2024, and New River Valley Real Estate is a veteran-owned and operated real estate company raising the bar for quality care and service in the community.

Team members leave the office at the end of the day feeling proud of what they've accomplished, appreciated, and energized to spend time with their family and friends. Investors sleep easy knowing their money is in good hands and on track to produce an ROI. When customers look for a place to rent and hear it's owned by us, they know they're in for quality service where their needs come first. And individuals in our community who traditionally faced high barrier entrance into buildings, like women from the Battered Women's Shelter and homeless veterans, now have beautiful and safe places to call home.

The secret to our success emerges from our honor code, aka our core values.



Core Values



Honesty

We conduct business with integrity, fair practices, and ethics. We try not to, but if we make a mistake, we own up to it and course correct quickly.



Quality

We put care into everything we do. When people see our logo or hear our name they think, *"Now that's a brand you can trust!"*



Personal Development

We educate ourselves and each other. Not just so we can do our jobs better but to improve the quality of our lives outside of work, too.



Efficiency

We work harder and smarter. If we can get more done in less time and create more flexibility to enjoy our lives, we're all in.



Teamwork & Communication

We work together. We're open and honest in our interactions and quick to lend a helping hand to accomplish more together.

Team

Our team has evolved into a tight-knit group of industry-leading experts. JB Klein, our **Founder and Chairman of the Board**, steers the ship with high-level business vision and strategy. With the right people in the right seats, his job is to make two to three good decisions each day. The rest is handled by our highly skilled and motivated team of A-players led by our **COO**, who ensures operations run smoothly. Supporting our executive leaders are our **Executive Assistant** and **Administrative Assistant** who help with the day-to-day admin tasks. Our **Research Assistants** lead due diligence, market research, and help the acquisitions team find deals. We now have four **Property Managers** who transform the vision for our properties into reality and deliver standout service to tenants.

The **Procurement Coordinator** and **Project Manager** collaborate on renovations and

maintenance to get properties client-ready. Our **CFO** manages company finances, partners with the banks to secure financing to generate capital for purchasing, and directly oversees the **Accounting Manager** who runs the books. They also work closely with our **Acquisition Manager** to discover new networking and business opportunities. The **Public Relations Manager** keeps the pulse of the market's perception of us and finds unique opportunities for collaboration and to increase our brand reputation. The **Advertising Manager** translates our high-touch, in-person experience to the screen behind our marketing campaigns. Our solid team of **Construction** and **Maintenance** people is fully supported by the business and focused on delivering high-quality work.

We hold high expectations for our people, and we take care of them in return.



Culture

We recruit, hire, and onboard quality people who are great at what they do and love doing it. We understand the importance of our work, so we do our best to be efficient and not waste time or money. We don't take lightly the fact that our job affects others, both inside and outside the company.

We are not just a group of coworkers. We're a family—a true team. The personal bonds and camaraderie we build are apparent even when we're off-the-clock. Whether it's picking up groceries or lending a listening ear to someone in need, we've put a lot of effort into building our future together, so we all share the pains of loss and the pleasures of success. We enjoy a healthy sense of humor, when appropriate, to get through the workday with joy. And it's not uncommon to see our founder walk in and ask a painter how his newborn son is doing or order lunch on a job site for our team. If there's a topic a team member wants to learn more about, say preparing for retirement or buying a car, we'll happily provide the resources you need. As a member of our team, we support your continued growth so that you can keep getting better at what you do and improve the quality of your life.



Headquarters

Our team headquarters sits on a campus of 12 acres of land overlooking the Blue Ridge Mountains. Offices are surrounded by company outdoor amenities for rest and exercise, including gym equipment, an exercise pool, and outdoor meeting spaces. When you walk inside, there's a large open area with comfortable couches and laptop stands, backed by large open windows. You feel like you're in your living room, but it's conducive to work. Team members can grab a snack in the kitchen or enjoy a hot cup of coffee out on the porch. But don't be mistaken, you'll never find us wasting time. **We relax to refuel.**

Core Business Activities

We are a veteran-owned and operated real estate agency. We buy, rent, and sell commercial and residential properties. We are proud to present a thousand units in our portfolio, including single-family homes, large multi-family homes, and two mobile home parks. We buy buildings that bring in cash flow nicely, allowing us to invest in properties that may have a lower cash flow but are of higher value in the market. This helps us fund our teams' salaries while building equity to leverage for continued growth. **We've expanded in multiple states, including Virginia, Florida, Colorado, Texas, and California.**



Sales & Marketing

The community and media are buzzing with praise for our brand. Word gets around about our events and the ones we sponsor, resulting in even more organizations and benefit groups reaching out to collaborate. Thanks to the hard work of our amazing marketing team, New River Valley Real Estate is known for its quality and honesty, resulting in a constant flow of new connections, deals, and partnerships.



Media & Awards

Town officials have recognized us for revitalizing dilapidated or neglected buildings, neighborhoods, and towns into beautiful spaces. In the newspaper, we've been spotlighted for restoring an abandoned historical landmark to beauty while adhering to the original historical style, once again making it a cornerstone of the town and attracting new visitors and residents to the community.

Thanks to our Public Relations Manager, we have rave reviews throughout Google, Yelp,

Facebook, and the Better Business Bureau. They also audit for any deficiencies in our quality of service and provide feedback to help us resolve client issues to satisfaction and ensure clients always walk away happy. We've been named **Top Employer** by NRV News because we offer our employees more than just a steady paycheck. We help them thrive in many aspects of their lives. We've received recognition for being one of the **Fastest Growing Companies** in our area and industry.

Financials

Each year we double our unit count, and this year we hit \$1MM in gross annual rents. We track all transactions efficiently and streamline various accounts into one central system. We stay on top of the latest technology to make it easier for clients to pay us and for us to pay vendors. With only a few clicks of the mouse, we have access to all the metrics and performance indicators, allowing us to quickly and easily filter for the best investment opportunities. We have great relationships with the banks—they're happy to do business with us because we've proved over the years that we're a low-risk company.

Community Involvement

We work hard to have a lot, so we can give a lot. We do that through donations *and* participation. This starts internally with giving forward to our team members who helped us get here and extends to our friends, family, and the larger community. Whether it's simply offering a shoulder for a team member to lean on or sponsoring an event in the community to raise awareness and funds for battered women's shelters, substance abuse recovery homes, or disabled people, we're happy to get involved. We collaborate with a non-profit that supports veterans in the community to provide housing as well as internships, free training, and coaching. Lastly, we never forget to give to ourselves and enrich our own lives, which fuels our motivation to always do more.



Founder Feeling

My core purpose in expanding New River Valley Real Estate is to gain the cash flow to pay the bills and the team to manage the company, so I have the freedom to focus on starting a non-profit dedicated specifically to veterans.

I want this company to be a legacy not just for myself but for my team members, where one day they can share ownership of the business. A legacy for investors, so they feel confident they made smart investments they'll see returns on for years to come. And a legacy for community members who live in and enjoy our properties.

My mission has always been to create a space that's enriching, fun, and conducive to a productive work environment where we can achieve our biggest goals.

Thanks to our hard work, values, and vision, we've built a well-reputed name for ourselves in the community, synonymous with trust and quality. None of it would be possible without you—my team, investors, and clients. I am so proud of everything we've accomplished and excited for what's next.

If this vision resonates with you, I would love to hear from you on how you believe you can help us or how we can help you make it a reality faster. Email me at jb.klein@newrivervalleyrealestate.net to share how you can support!

- JB Klein