



SELF
STORAGE
ASSOCIATION

Participate. Learn. Benefit. Succeed.



2026 Fall Conference & Trade Show

Aria Resort & Casino, Las Vegas

September 8–11

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Search for “SSA” in the
Eventsential app

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CONFERENCE PROCEEDINGS

OCTOBER 5-7



SELF STORAGE —
**VALUATION &
ACQUISITION**
— COURSE

Denver, Colorado

GAYLORD ROCKIES RESORT



Register Today

For information on accommodations
and the course, please visit selfstorage.org.

**Attend this fast-paced
executive education course
for self storage real estate
investment management.**

SSA CAFÉ

(badge required for entry)

Tuesday 7:00a – 5:00p

Wednesday 7:00a – 5:00p

(Café closed from 11:30a-4:00p)

Thursday 7:00a – 5:00p

(Café closed from 11:30a-3:00p)

Friday 7:00a – 11:15a

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Effective: 9/1/2004

**SSA
ANTITRUST
POLICY AND
MEETING
GUIDELINES**



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***Self Storage Association
1901 North Beauregard Street
Suite 106
Alexandria, VA 22311
Ph: 703.575.8000
Fax: 703.575.8901
www.selfstorage.org
info@selfstorage.org***

Antitrust Guidelines

The antitrust laws seek to preserve a free competitive economy in the United States and in commerce with foreign countries. As a general rule, competitors may not restrain competition among themselves through understandings or agreements as to the price, the production, or the distribution of their products, or other agreements which unreasonably restrict competition. They may not act in concert to restrict the competitive capabilities or opportunities of their competitors, their supplier, or their customers.

The antitrust laws, however, are often of unclear applicability, and unlawful agreements can be inferred from circumstantial evidence. Furthermore, penalties for violating the antitrust laws are severe. The guidelines, set forth below, are designed to avoid even the appearance of questionable activity. At SSA meetings, the following will not be discussed:

1. Current or future prices.
2. What constitutes a "fair profit level."
3. Possible increases or decreases in prices.
4. Standardization or stabilization of prices.
5. Pricing procedures.
6. Cash discounts.
7. Credit terms.
8. Control of sales.
9. Allocation of markets or geographical division of markets.
10. Refusal to deal with a corporation because of its pricing or distribution practices.
11. Whether or not the pricing practices of any industry member are unethical or constitute an unfair trade practice.

Statement of Policy

It is the policy of the Self Storage Association (SSA) and its members to comply strictly with all laws applicable to SSA's activities. Because SSA's activities involve cooperative undertakings and meetings among competitors, the Board of Directors emphasizes the ongoing commitment of SSA and its members to full compliance with federal and state antitrust laws. A statement explaining this policy is to be distributed at all SSA meetings to remind each member of this commitment and as a general guide for our activities and meetings.

Responsibility for Antitrust Compliance

SSA's programs have been carefully designed and reviewed to ensure their conformity with antitrust standards. Each SSA member has an equivalent responsibility for antitrust compliance. Each business enterprise and SSA depend upon good judgment by all to avoid discussions and activities which could involve improper subject matter or improper procedures-or even an appearance of improper activity. SSA staff members work conscientiously to avoid subject matters for discussion which may have unintended implications, and counsel for SSA provides guidance with regard to these matters. Thus, all concerned have an important and individual responsibility for assuring antitrust compliance in SSA activities.

Meeting Procedures

To avoid even the appearance of questionable activity, as well as to guard against inadvertent conduct, all SSA meetings will be conducted in accord with the following procedures:

1. A written agenda will be prepared.
2. Accurate minutes of every meeting will be prepared, expeditiously sent to the participants, and approved at the next meeting.
3. In case of doubt about the propriety of a topic of discussion, consult staff management or corporate counsel.
4. If a member has a reservation concerning remarks or discussion at an SSA meeting, officially state the reservation; if the discussion is not terminated or resolved satisfactorily, the concerned member should leave the meeting.
5. Rump sessions involving the discussion of business matters should be avoided.

Conclusion

Compliance with these guidelines involves not only avoidance of antitrust violations, but avoidance of any behavior which might be considered improper. Antitrust laws are complex and far-reaching. This statement is not a complete summary of all applicable laws. It is intended to highlight and emphasize certain basic precautions designed to avoid antitrust problems. In case of doubt, seek the guidance of staff management or SSA counsel or your own corporate counsel if antitrust questions arise. More detailed information is available upon request. Call 703.575.8000.

Timothy J. Dietz
President & CEO



By joining the Self Storage Association, you become part of the largest community of self storage facility owners, operators, managers and suppliers in the world.

Some of the benefits of the association include:

New Member Operations Package: Upon new membership or renewal, Direct Members now receive three essential operations publications; the Self Storage Employee Policy Manual, the Guide to Drafting Your Rental Agreement and the Self Storage Training & Procedures Manual. These publications are digital files and appear on your member dashboard when you log into selfstorage.org (certain restrictions apply).

Data & Information: SSA data publications include the Self Storage Demand Study, Traffic Study, member survey's and quarterly REIS / SSA self storage data includes survey results from more than 40,000 participants on financial & occupancy characteristics in 125 MSA's and 477 sub-markets. Direct members receive discounts on all studies. These studies are revolutionizing the way owner-operators, and managers, look at this industry and how they market to their residential and commercial customer base.

Self Storage Association Annual Executive Ski Workshop: Join your peers and network during the Annual SSA Executive Ski Workshop. This educational getaway boasts some of the industry's top speakers. Combine that with industry roundtables, networking and some skiing fun, and you can understand why this event is sold out every year. This is an SSA member-only event.

SSA Spring Conference: Gain a competitive edge by being the first to see the latest products, technology, and services at the SSA Spring Conference and Trade Show. Members can exhibit and attend at discounted rates. This east of the Mississippi event location varies year to year, please check www.selfstorage.org for location and date.

SSA Fall Conference: In addition to the Spring conference, SSA offers the Fall Conference and Trade Show in Las Vegas, Nevada. Once again, SSA brings you the top industry suppliers in this trade show, educational seminars, and remarkable speakers that will have you talking weeks after the conference. This conference, like other SSA events, offers one on one roundtable discussions on industry topics that are important to you, your business and bottom line.

Education & Training Programs: An educated workforce is one of the most important factors in growing your company. SSA provides first-class self storage specific learning opportunities on a variety of topics. SSA Online University also presents live monthly webinars, free to SSA members, plus downloadable training for companies and individuals through SSA Online U's Education to Go and Webcast Recording Library. Additionally, SSA offers the acclaimed SSA Managers Certification Program, an intensive course providing a solid foundation for self storage management, and an opportunity for self storage professionals to attain the prestigious SSA Certified Self Storage Manager (CSSM©) designation.

Publication Discounts: SSA offers numerous sales and marketing tools, data, management materials, resources, safety programs and legal resources at deep discounts to members and conference attendees.

The SSA Magazine: By mail, you will receive the industry's leading magazine, *SSA Magazine*. The Online SSA Magazine is the virtual version of the Self Storage Association's membership magazine. The publication keeps you up to date with the SSA's latest news and activities, providing features about owners, operators and employees that make the industry what it is today.



Self Storage Legal Review Newsletter: The Self Storage Legal Review is the industry's top legal publication and is your best source of timely information on legal developments in the industry. It monitors emerging trends and legal issues that affect not only the industry, but your individual business as well. This is a bi-monthly publication. SSA members receive one subscription to the SSLR with membership in the Self Storage Association. Don't let this opportunity wait any longer! Make sure that you have the information you need to do the best job that you can.

SSA Magazine Weekly: Each Monday you will receive the *SSA Magazine Weekly* in your email inbox. This email contains industry news and information pertinent and relevant in a timely manner.

Industry Advocacy: SSA regularly flies around the country to represent members on self storage issues at the local and state levels. In addition, SSA represents the industry before the U.S. Congress and federal regulatory bodies, as well as in-person representation and testimony from SSA Government Relations Staff.

SSA Legal Resource Center: The SSA Legal Resource Center (LRC) will provide a one-stop library destination for self storage operators to access the legal information necessary to operate their successful storage businesses. The Legal Resource Center makes legal information available to SSA members at no charge. The SSA in-house legal team monitors the LRC.

Enhanced Business Exposure: SSA members have more business exposure. Members are listed in SSA's online facility locator and may use the SSA member logo in marketing and outreach materials. Additionally, SSA produces, online, the Membership Directory which provides a "who's who" in the self storage industry.

Self Storage Legal Network: How much do you spend per year on legal fees? A popular benefit of being a direct SSA member is access to the Self Storage Legal network. This legal hotline service is only available to SSA members and provides one of the best sources available for obtaining industry related legal information. The SSLN attorney's are Carlos Kaslow and Scott Zucker, whose combined experience in the self storage industry exceeds 50 years! The subscription rate for the SSLN begins at \$750 yearly (prices based on facility count). When you or your employee have a legal question concerning self storage operations, you simply login to the SSLN online portal and email your question. THE SSLN is staffed from 8:00 a.m. – 5:00 p.m. M-F and provides a response to your inquiry by the next business day. Lien law questions, rental agreements, or partial payment questions – just ask the attorneys. The SSLN is a legal and operations information service and does not provide subscribers with legal services. For more information on this please contact SSA at info@selfstorage.org.

Scholarship Fund: The SSA Foundation Scholarship Program provides scholarship awards of \$2,500 to \$10,000 toward postsecondary education tuition and fees. This is a need-based scholarship program for students with at least a "C" cumulative average or 2.0 cumulative GPA on a 4.0 point scale. Recipients must be employees (or their children / grand-children) of companies which are direct members of the Self Storage Association (national). Eligibility requirements also include a demonstration of integrity within school and /or workplace and documented pursuit of meaningful education at an accredited postsecondary education institution.

As always, by renewing your membership you instantly receive a \$50 gift certificate which may be redeemed to attend our trade shows, increase your office library by purchasing any of our books which includes the annotated lien laws or use it to partake in a seminar.



CONFERENCE PROCEEDINGS

FALL CONFERENCE & TRADE SHOW

September 8 - 11, 2026 • Aria Resort & Casino
Las Vegas, Nevada

Many speakers were considered by the Self Storage Association for our conference program. Selected were those individuals who were thought to be the most capable of presenting their expertise and experience so that you, the self storage professional, would benefit from your conference participation. The experience and knowledge of our speakers is vast. We urge you to take advantage of it!

Each speaker was encouraged to submit a written presentation (frequently referred to as a “handout”) for inclusion in this electronic book. If provided, those handouts are contained herein, and are *arranged by day, in the order that they appear in the program.*

Most of our speakers have agreed to let us audio-record their presentations, along with their PowerPoint presentations. **Registrants in the "Full" or "Additional Rep" categories (who are SSA Direct members) will receive a free download of the approved recorded presentations, about 3 weeks after the event.** Other registrants may purchase downloads. Watch the SSA website (www.selfstorage.org) for information on ordering these recordings.

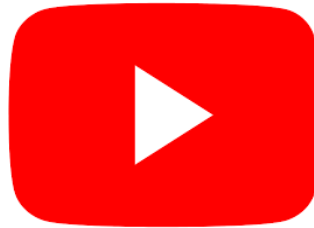
Should you wish to contact our speakers as a follow-up to their participation in this conference, you will find complete names and addresses on the Attendee List, found on our mobile app, shown alphabetically by company.

Roundtable discussion topics (if scheduled) and pre-conference optional events are *not included* in these Proceedings. A description of the discussions are in your onsite program guide. For additional information on the topics, we suggest you contact the discussion leaders. They are listed in the Attendee List, alphabetically by company, in our mobile app.

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#SSAVegas26



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APPLE



ANDROID

SCAN THE QR CODES FOR APPLE OR ANDROID



TUESDAY **PRESENTATIONS**

SELF STORAGE ASSOCIATION 2026 FALL CONFERENCE & TRADE SHOW

Handouts for speakers whose
presentations are scheduled for
Tuesday follow this page

SSA 101: MAXIMIZE YOUR EXPERIENCE

PRESENTERS: SSA STAFF

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2026 Fall Conference & Trade Show



Welcome!

Julia Bankerd
Director, Membership

Tom Comi
Director, Communications

Chelsea Glass
Director, Research & Data Strategy

Erin Lightfoot
Director, Education & Events

Stephanie Satterfield
Director, Marketing & Member Outreach



Self Storage Association

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1

Thank You to our Sponsors







Company Name

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2

The SSA



Connecting, uniting,
protecting, engaging
and advocating for our
members for over 50
years.



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3

Let's Connect

Visit us at the Member Zone

Booth # 2623

Meet the team.

We'd love to hear what brought you to SSA.

Ask us about:

**Data
Hub**

**On-Demand
Webinars**

**What's
Up SSA?
Podcast**

**Success
in Sixty**



www.selfstorage.org
info@selfstorage.org
Connect with us online

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4

Education & Resources



Conferences & Trade Shows
Ski Workshop
Legal Zoom Q&A
Valuation & Acquisition Courses
Employee Training & Certification



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5

SSA - Beyond Member Benefits

WHAT BRINGS YOU HERE

Education

Advocacy

Resources

Opportunities

WHAT KEEPS YOU HERE

Relationships

Trusted advice

Connections

Community

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6

Find Your Community



Large Operators Council
For executives leading multi-facility operations.



Young Leaders Group
For emerging professionals building their careers.



Women's Council
For women looking to connect, lead, and grow.

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7

Communications

The Industry's Only Comprehensive Source for Legal Information For Owners and Managers



SSA MAGAZINE
WEEKLY



SSA Magazine print edition (monthly)

SSA Magazine digital edition (monthly)

Self Storage Industry Report (weekly column, SSAMagazine.org)

SSA Magazine Weekly (weekly e-newsletter)

SSA Monthly Update (email)

SSA Legislative updates (email and social media)

SSA Legal Review (bimonthly)

SSA Blog (guest columns, SelfStorage.org)

SSA Managed & Chartered States E-Newsletter (quarterly)



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8

Publications



Visit the Membership Lounge to purchase these books and more! Conference attendee discounts available.



Conference Offer!
Save **\$250** on the Demand Study



- Legal
- Operations
- Research & Data
- Marketing



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9

SSA Foundation



DID YOU KNOW?

Each year the SSA Foundation (SSAF) awards scholarships to national SSA member employees and their families!

Since its inception, the SSAF Scholarship program has awarded over 497 scholarships for a total of over **1.4 million dollars** to students affiliated with the self storage industry.

Email SSAFS@selfstorage.org to learn more

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10

Legal & Legislative

SSA is the voice of the industry at state capitols, in D.C., and before code-writing organizations.

Offensively: Update lien laws, promote legislation for tenant insurance, and modernize building codes.

Defensively: Sales tax, other property tax hikes, and attacks on lien remedy.

Legal: Assist members with legal resources (including SSLN) and references.



Joseph L. Doherty, IV
EVP, Chief Legal Officer



Daniel Bryant
Legal & Legislative Counsel

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11

SSA Legal Resource Center



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12

Research & Data

- SSA has a **longstanding commitment to industry research** and market education.
- **More than 20 years of research leadership** through landmark studies and member resources.
- Research remains a **critical member benefit** amid growing market and regulatory complexity.
- Now expanding these efforts, to **ensure research aligns with member needs**, and turn insights into actionable guidance.



Mike Blackett
SVP, Marketing & Communications



Chelsea Glass
Director, Research & Data Strategy

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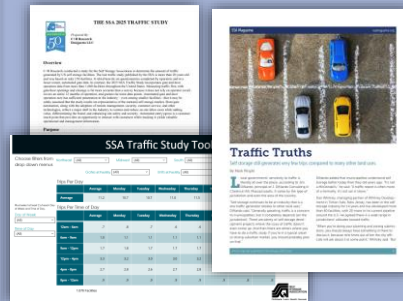
13

Foundational Research Studies

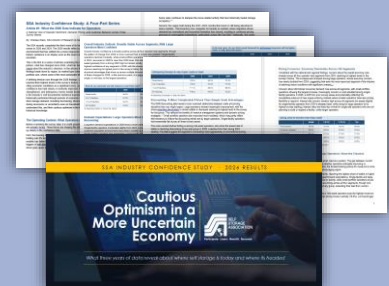
Self Storage Demand Study



Traffic Study



Industry Confidence Study



...and more to come

Help shape future SSA research.
Scan the QR code to tell us which topics matter most to you.



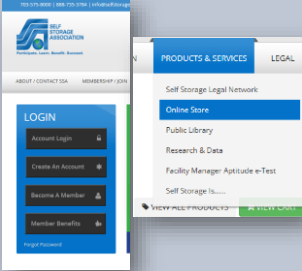
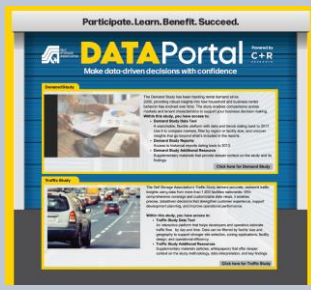
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14

Accessing Research

SSA Website	SSA Magazine	SSA Blog	SSA Data Portal
selfstorage.org	ssamagazine.org	selfstorage.org/Blog	Research & Data
			

Reach out to me with any questions on SSA Research
CGlass@selfstorage.org

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15

Download the Conference App

Everything you need at the tip of your fingers!

The SSA Eventsential mobile app allows you to build your schedule,
 read about speakers and sessions, locate exhibitor booths,
 find & chat with attendees and engage on social media.



DOWNLOAD THE MOBILE APP

Download Eventsential app from your app store (scan QR)

Search for "SSA" in the Eventsential app







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16

Gamification – Shall we play a game?

Connect & Collect: The Trade Show App Challenge

How to Play

1. Download the App
2. Open and Log-in on the App to Use the Game QR Scanner
3. Talk to Exhibitors & Scan QR Codes Each exhibitor scan earns you **2 points**.
4. Hunt for Bonus Points

The Member Zone The Foundation Counter PAWS for a Cause

The Grand Prize Drawing

Winners will be announced live on the trade show floor on **Wednesday & Thursday**.

Note: You must be present at the drawing to win, so make sure you're there when we call the names!

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17

Tips & Reminders

Receptions

- Have a Plan
- Divide & Conquer
- Rest & Hydrate
- Networking is Key



Tuesday Night Canadian SSA
Reception Startvine 12-13
(6p-7:30p)

Wednesday Night Welcome Reception at **Sphere** (6p-9:30p)
Shuttles from the Aria to Sphere start at 5:45p. Shuttles from Sphere to Aria start at 8p.

Thursday Night YLG Reception
Proper Eats Bar – Aria
(7p-10p)



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18

Save the Date



2027 SSA Executive Ski
Workshop
January 11-14, 2027
Telluride, CO



2027 SSA Spring Conference & Trade
Show
April 27-29, 2027
Savannah, GA



2027 SSA Fall Conference & Trade
Show
September 7 - 10, 2027
Las Vegas, NV

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19

Time to Win!



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20

EXHIBITOR ONSITE ESSENTIALS

PRESENTERS: SSA STAFF



SSA 101: Exhibitor Essentials

Presented by: SSA Staff

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Introductions: Who does What?

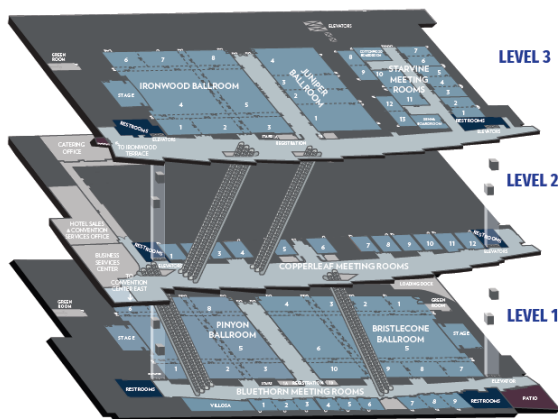
- Julia Bankerd: Membership
 - jbankerd@selfstorage.org
- Tom Comi: Ad Sales for SSA Magazine
 - tcomi@selfstorage.org
- Carol Franklin: Sponsorships & Exhibits for National Events
 - cfranklin@selfstorage.org
- Erin Lightfoot: Sponsorships & Exhibits for State Events
 - elightfoot@selfstorage.org
- Jennifer Pettigrew: Sponsorships & Exhibits for National Events
 - jpettigrew@selfstorage.org
- Stephanie Satterfield: State Marketing Opportunities
 - ssatterfield@selfstorage.org

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Lay of the Land



- Level 3:
 - Conference & General Sessions
 - Master Classes
 - SSA Café
 - YLG
 - Roundtables
 - Women's Council
- Level 2
 - Registration
- Level 1
 - Trade Show
 - Exhibitor Lounge

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Onsite Essentials

- Move-in:
 - Tuesday: 8:00am – 5:00pm
 - Can stay late if needed. No in and out after 6:30pm
 - Wednesday: 8:00am – 10:00am
 - Booths must be show ready by 10a with all empties tagged for Freeman to remove
- Show Open
 - Wednesday: 11:30am – 4:00pm
 - Thursday: 11:30am – 3:00pm
 - No displays may be dismantled, nor any packing started before 3:00pm
- Move-Out
 - Thursday: 3:00pm – 7:00pm
 - Be sure to tag any items you want to donate!

- Exhibitor Service Center
 - Location: Bluethorn 4-5
- Floor Manager: B. Murphy



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Onsite Essentials



- Exhibitors will need a **RED** badge to enter the trade show early/late
- No one under the age of 16 allowed in the trade show during move-in and no one under the age of 18 allowed in the trade show while the show is open
- Box Lunches will be served in both ballrooms in the main cross aisle on both Wednesday and Thursday from 10:30a – 11:15a

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NEW: The Trade Show App Challenge

Your 3-Step Exhibitor Checklist

1. **Pick Up Your QR Code:** Before the trade show floor opens, stop by the **Exhibitor Lounge** to pick up your printed, unique QR code.
2. **Keep It Handy & Visible:** Place the QR code in an easily accessible spot within your booth (e.g., on your main counter or a high-top table).
TIP Keep it handy so attendees can scan it quickly after you've connected, but placed where they need to interact with you to see it!
3. **Engage, Talk, & Scan:** Use the game as an easy icebreaker! When attendees walk by or visit your booth:
 - ★ Ask if they are playing the app game.
 - ★ Strike up a conversation about your products or services.
 - ★ Encourage them to scan your code before they leave to earn **2 points** towards great prizes.

Important Details

The game runs throughout the show, and winners will be announced live on the trade show floor on Wednesday, September 9 and Thursday, September 10.

Thank you for helping us create an exciting, high-energy environment for our attendees!

Pro-Tip for Staff

Remind attendees that they must be present on Wednesday and Thursday to win—it's a great way to ensure they keep coming back to the floor!



Company Name

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NEW: Donate items you no longer want!

How it works:

- 1. Identify:** Before move-out, identify the reusable items you would like to donate.
- 2. Mark Items:** Place the provided “DONATE — DO NOT DISCARD” sticker on each item you are designating for donation.
- 3. Recover:** ReSupply by Eve will coordinate the post-event pickup of **approved and authorized materials** in accordance with show management and move-out procedures.

ReSupply by Eve

EXHIBITOR OPPORTUNITY
DONATE. MAKE AN IMPACT.

REHOME • REUSE • REPURPOSE
Help reduce waste and support our community by donating your reusable items after the show.

YOUR DONATION CAN MAKE A DIFFERENCE
Usable booth materials, supplies, and furnishings can benefit local nonprofits, schools, shelters, and community programs.

ITEMS YOU CAN DONATE INCLUDE:

- Display Racks & Shelving
- Furniture
- Signage & Pop-Up Banners
- Decor & Props
- Office Supplies
- Glassware & Swag
- Reusable Booth Materials
- And More!

WHAT HAPPENS WITH DONATED ITEMS?

- REHOME**
Certify good items that find a new home where they are truly needed.
Our goal is simple: keep usable materials out of the waste stream while creating positive community impact.
- REUSE**
Quality items may be used again by ReSupply by Eve for future events and programs.
- REPURPOSE**
Materials that can't be reused are repurposed creatively to reduce waste.

WHY DONATE?

- REDUCE WASTE**
Keep usable materials out of landfills and reduce your environmental impact.
- POSITIVE COMMUNITY IMPACT**
Support local nonprofits, schools, shelters, and community programs.
- ENHANCE YOUR BRAND**
Show your commitment to sustainability and social responsibility.
- EASY & CONVENIENT**
We make donating simple with complimentary pickup after the show.

QUESTIONS?
We are here to help!

702.409.1122 | eve@resupplybyeve.com | resupplybyeve.com

WOMAN-OWNED & OPERATED | **SUSTAINABILITY FOCUSED** | **DETAIL-ORIENTED SOLUTIONS YOU CAN COUNT ON.**

ReSupply by Eve

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Donations

Potential items may include:

- TVs & monitors
- Tables & chairs
- Shelving & display racks
- Flooring and carpet tiles
- Pop-up banners & signage
- Booth structures and reusable displays
- Décor & props
- Office supplies
- Storage bins & containers
- Giveaways & promotional materials
- Unused event supplies
- Other clean, reusable event materials

WHAT HAPPENS NEXT?

Recovered materials will be:

- **REHOMED**
- **REUSED**
- **REPURPOSED**

Please note: Only items designated for donation by the exhibitor and authorized for release by show management will be removed.

There is no cost to exhibitors for this recovery service.

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Vendor Membership

Build relationships. Showcase your expertise. Grow your business.

Contribute

- Share your industry expertise — apply to speak at SSA events and educational programs.

Sponsor

- Get in front of decision-makers through sponsorships, events, and industry opportunities.

Advertise

- Put your company in front of the self storage industry through targeted advertising and visibility opportunities.

Lead

- Get involved, build relationships, and help shape the future of the self storage industry.

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Vendor Membership

Advocacy – The only nonprofit trade association dedicated to advancing the self storage industry through advocacy and education.

Networking – Connect directly with industry professionals through national trade shows, regional meetings, Ski Workshop, state association events, and more.

SSA Magazine – Receive the industry's highest-circulation publication each month. Vendor members also have exclusive advertising opportunities in *SSA Magazine*.

Vendor Directory – Vendor members are listed in our directory, offering all members a comprehensive directory of SSA member companies providing products and services to the self storage industry.

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Spring Conference Timeline

1. Make sure your membership has been renewed for 2027
2. Prospectus sent to all 2027 active Vendor Members mid/late October
 - **NOTE: Be sure to whitelist our Constant Contact email, and that the appropriate team member is in our database to receive our emails.**
3. Payment Due: Early November
4. Booth Selection Appointments: Early December

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Questions?

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WEDNESDAY **PRESENTATIONS**

SELF STORAGE ASSOCIATION 2026 FALL CONFERENCE & TRADE SHOW

Handouts for speakers whose
presentations are scheduled for
Wednesday follow this page

FOUNDATION FORUM SPEAKER



HEATHER PENNEY

**9/11: CULTIVATING
THE HERO WITHIN**

Access to LOC events requires membership in the LOC, registration badge and wristband. Qualified attendees can acquire a badge at the conference registration desk.





LARGE OPERATORS COUNCIL MEETING

*(You must be a member of the LOC to attend – LOC
registration and wristband required)*

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JANUS[®]

INTERNATIONAL GROUP

Concurrent Educational Session

SELF STORAGE PLAYERS PRESENT: THE KEY TO POOR OPERATIONS

SHANNON CHARBONNEAU, *XPS SOLUTIONS*
GARY EDMONDS, *THE STORAGE MANAGER*
STACIE MAXWELL, *SECURELEASE*
TOMMY NGUYEN, *STORAGEPUG*



The Self Storage Players Present: The Key To Poor Operations

Shannon Charbonneau, XPS Solutions

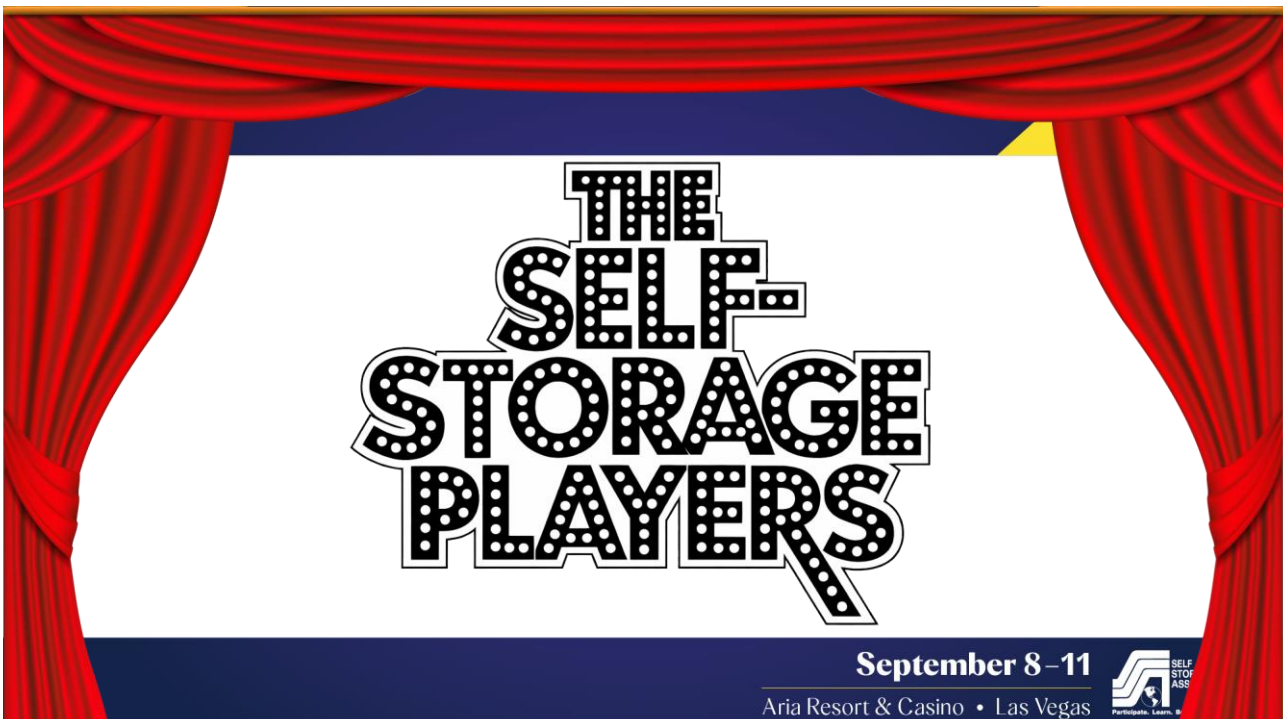
Gary Edmonds, The Storage Manager

Stacie Maxwell, SecureLease

Tommy Nguyen, Storage Pug

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1



2



Act I: First Impressions

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3



Act II: Connect Just Right

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4



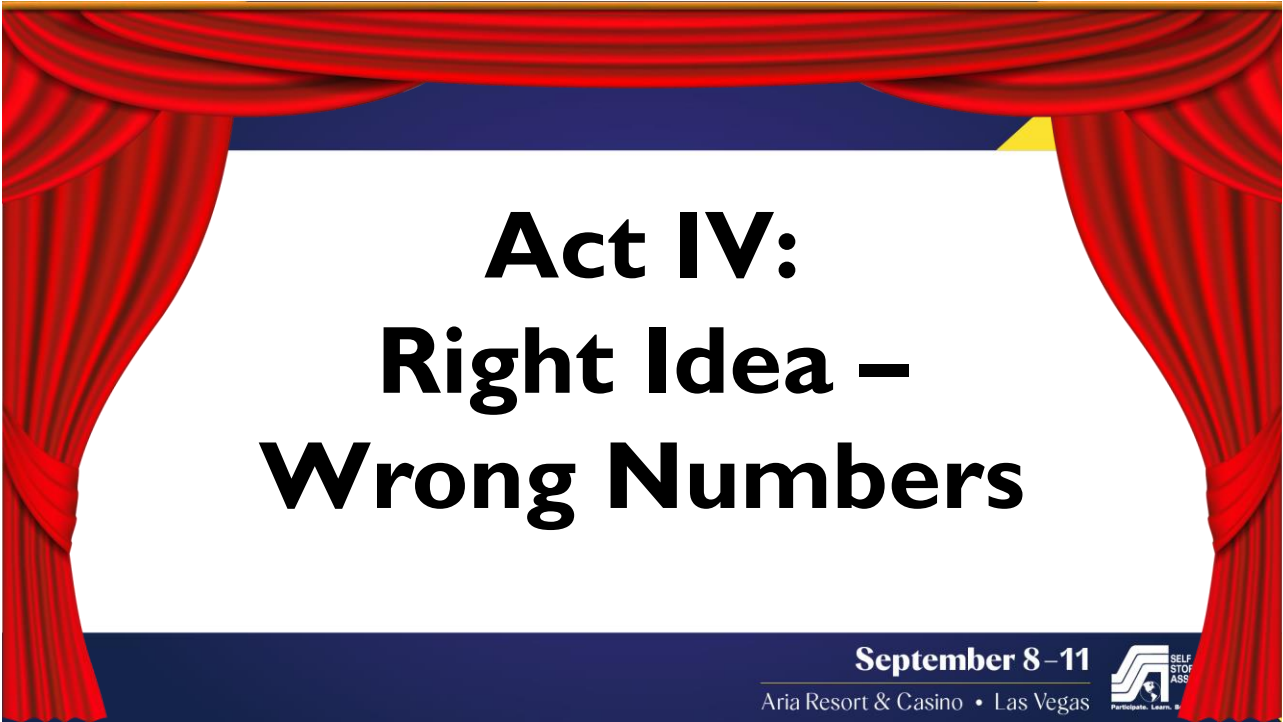
Act III: Disappearing Act

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5



Act IV: Right Idea – Wrong Numbers

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Q & A: Lightning Round

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7

**THE
SELF-
STORAGE
PLAYERS**

Thank
You!



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8

Concurrent Educational Session

THE OPERATOR'S ADVANTAGE: TURNING DATA AND AI INTO EVERYDAY ACTION

CHUCK GORDON, *STORABLE (Moderator)*
RAHEEM AMER, *MYPLACE SELF STORAGE*
ANDREW CAPRANOS, *10 FEDERAL*
ANASTASIA MALAGISI, *SAFEGUARD SELF STORAGE*

2026 Fall Conference & Trade Show



The Operator's Advantage: Turning Data and AI into Everyday Action

Moderated by: Chuck Gordon, Storable

Panelists: Anastasia Malagisi, Safeguard Self Storage; Andrew Capranos, 10 Federal Self Storage; Raheem Amer, My Place Self Storage

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Concurrent Educational Session

SELF STORAGE LAW AND TECHNOLOGY: MANAGING RISK WHILE ADDING TECHNOLOGY TO YOUR BUSINESS

CARLOS KASLOW, *SSLN*

SCOTT ZUCKER, *WEISSMANN ZUCKER EUSTER & OBLINGER, PC*



Self Storage Law and Technology

Managing Risk While Adding Technology to Your Business



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Tenant Privacy & Data Security Obligations

- Collecting more digital data - online rentals, gate access logs, surveillance footage - they face growing exposure under state and federal privacy laws.
- Lessons from the RealPages lawsuit
- California Invasion of Privacy Act (CIPA)
- “trap and trace litigation”: Websites that capture electronic information reasonably likely to identify the source of the communication
 - SB 609 - Ends class-action lawsuits - Only AG can bring enforcement action

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Going Digital- Best Practices

- Best practices from online rentals, electronic signatures, facility and space access, to automated lien and collections processes
- What does the law allow?
- Where do you want your operations to go?
- Does your management software support how you want to run your facility

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Avoiding Litigation

- Understanding the laws for data wiretapping, tenant surveillance, managing military tenants, and handling tenant terminations
 - Do you know what information your website collects when visitors stop by?
 - Ask your vendor
- Website Terms of Use and Disclosure

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Cases – Legal Uncertainty

Howard v. Republican National Committee: The Ninth Circuit held that a text message qualifies as a “call” under the TCPA, reasoning that texting fits the plain, ordinary meaning of a telephone communication. The court also held that a text carrying a video requiring the recipient to press play is not itself a “prerecorded voice” message

Steidinger v. Blackstone Medical Services - The 7th Circuit ruled that a text message was not a telephone call

Sundstrom v. Ocean Reef Media LLC: Claims against companies whose services were advertised by third-party texts were dismissed for lack of a plausible agency relationship – a reminder that using a marketing vendor does not itself create TCPA exposure, but sloppy vendor oversight can

Clay v. Union Pacific Railroad Co.: The Seventh Circuit held that a 2024 BIPA amendment capping damages to one recovery per person – rather than per scan or collection – applies retroactively to cases already pending, sharply limiting exposure in biometric class actions.

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Key Takeaways

- ✓ Technology adoption doesn't replace legal duties — it multiplies the statutes that apply to a single tenant interaction.
- ✓ TCPA and BIPA exposure now turn on how, not just whether, a facility communicates or authenticates access.
- ✓ California is the current bellwether on e-notice and algorithmic-pricing law — other states are expected to follow.
- ✓ The strongest defense is proactive: consent language, vendor diligence, and state-specific templates built before a tool goes live.

Questions?

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Carlos Kaslow, Esq. CKaslow@msn.com



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Concurrent Educational Session

WHAT LENDERS REALLY LOOK AT: HOW TO POSITION YOURSELF FOR CONTINUED GROWTH

ANNE MINO, *LIVE OAK BANK*



WHAT LENDERS REALLY LOOK AT

How to position yourself for continued growth

Anne Mino · Senior Loan Officer · Live Oak Bank

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1



FINANCING ONE TRANSACTION

Can this borrower close this deal?

A single question, answered once. Enough cash for the injection.
Enough income to cover the payment. Credit clean enough to approve.

BUILDING A BORROWER PROFILE

Will this borrower still be financeable after this deal?

Liquidity left standing. Debt capacity preserved. A facility that performs
and proves you can operate. Reporting we can rely on.

Both loans can close. Only one of them leaves you ready for the next one.

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The logo for the Self Storage Association, featuring a stylized 'S' and 'A' and the text "SELF STORAGE ASSOCIATION" and "Participate. Learn. Benefit. Succeed."

2

THE CENTRAL IDEA

Every acquisition should improve your ability to finance the next one.

If a deal closes but leaves you with no cash, no capacity, and a facility that underperforms, it did not move you forward.

YOUR LOAN REQUEST HAS TWO SUBJECTS

50%

Guarantor strength

Can you support your own personal debt, fund the injection, and absorb a slow first year?

50%

Cash flow of the deal

Can the facility itself service the debt, at defensible occupancy and rates?

A good facility cannot completely overcome a weak borrower.

A strong borrower should not buy a bad facility.

THE LENDER IS ASSEMBLING A COMPLETE RISK PICTURE



01 Credit profile Character, not just score	02 Liquidity Cash you can reach today	03 Recurring income Three years of history	04 Personal obligations Every minimum payment
05 Existing business performance	06 Experience Yours or your team's	07 The acquisition itself The one that can't be offset	

We do not underwrite these in isolation. We evaluate how the whole picture works together.

THERE IS NO SINGLE PROFILE OF A STRONG BORROWER



POTENTIAL WEAKNESS	POSSIBLE MITIGATING STRENGTH
Limited post-closing liquidity	Strong, stable recurring household income
Inconsistent outside income	Significant liquidity and low personal debt
Limited ownership experience	Strong industry knowledge, third-party support, and a conservative deal
Underperforming existing facility	Clear explanation, improving trends, and adequate global cash flow
High personal debt	Strong income and sufficient global debt-service coverage
Lower net worth	Adequate cash, strong credit, and a well-performing acquisition
Weak deal cash flow	Very little can compensate for a fundamentally weak acquisition

GLOBAL CASH FLOW ANSWERS A BIGGER QUESTION THAN PROPERTY DSCR



PROPERTY DSCR

Can this facility cover its own loan?

Net operating income of one property, divided by the debt service of one loan. Target: 1.25 by the beginning of year two.

GLOBAL CASH FLOW

Can everything you own cover everything you owe?

Household income, every existing business, every personal obligation, every existing loan, and the proposed loan — in one calculation.

A deal can clear 1.30 at the property and still fail globally. That is the conversation most borrowers are not expecting.

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HOW LENDERS CALCULATE GLOBAL CASH FLOW



INCOME AVAILABLE

Guarantor W-2 salary	\$85,000
Existing facility net operating income	\$304,000
Acquisition facility net operating income	\$115,000
Spouse recurring income	\$60,000
Total income	\$564,000

DEBT SERVICE

Personal debt — \$4,000 per month	\$48,000
Existing facility loan	\$250,000
Proposed acquisition loan	\$92,000
Total debt service	\$390,000

GLOBAL DEBT SERVICE COVERAGE

\$564,000 ÷ \$390,000

1.45

The bank wants at least **1.25** by the beginning of the second year. Seller notes count in this calculation.

Raise personal debt from \$4,000 to \$9,000 a month and this same borrower lands at 1.25. Nothing about the deal changed.

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RECURRING INCOME CAN OFFSET LIMITED LIQUIDITY — BUT ONLY TO A POINT

CARRIES THE MOST WEIGHT

Stable W-2 salary
Established business income
Pension and retirement income
Spouse income in the household

COUNTED, BUT DISCOUNTED

Commissions
Bonuses
Investment and dividend income
Distributions that vary year to year

HARD TO RELY ON

Income declining year over year
One strong year in three
Income from a business you are selling
Projected income with no history

We review three years of income history and average it when the trend is uneven. A single strong year does not establish capacity — and no amount of income replaces the cash you need at closing.

PERSONAL DEBT QUIETLY REDUCES BUSINESS BORROWING CAPACITY

Household recurring income should be at least 2× household debt.

Debt is measured from the minimum monthly payments shown on your credit report — mortgages, car loans, credit cards, student loans, and anything else reporting.

Monthly debt × 12 × 2 = required annual household income

Every \$1,000 of monthly personal debt requires roughly \$24,000 of annual household income before the deal is considered.

EXAMPLE

Minimum monthly payments	\$4,000
Annual debt	\$48,000
Required household income	\$96,000

If you guarantee this loan, your household has to hold up even when the business has a rough quarter.

NET WORTH DOES NOT MAKE LOAN PAYMENTS

A BORROWER WITH \$4,200,000 NET WORTH

Equity in real estate	\$3,600,000
Retirement accounts	\$500,000
Personal property and collectibles	\$40,000
Cash in checking and savings	\$60,000

The first three lines do not count as liquidity. The deal needs \$103,000 at closing and \$30,000 standing behind it afterward.

AVAILABLE LIQUIDITY

\$60,000

Needed at closing: \$103,000
Needed after closing: \$30,000

Short by \$73,000

You can have a very high net worth and still not qualify. In commercial lending, liquidity is often more important than net worth.

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LIQUIDITY HAS THREE SEPARATE JOBS

01

Equity injection and closing costs

The cash that gets you to the table.
Conventional 25–35%, SBA 10–15%, SBA expansion as low as 0%.

02

Post-closing operating protection

Reserves for lease-up, a slow quarter, a roof, a rate change. Liquidity is what keeps small problems from becoming big problems.

03

The next acquisition

The job nobody budgets for. If jobs one and two consume everything, there is no third deal to underwrite.

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WHAT COUNTS AS LIQUIDITY, AND WHAT DOES NOT

COUNTS

Checking and savings accounts
Brokerage and stock accounts
Business accounts solely owned by the guarantor household
Cryptocurrency — case by case, typically discounted or excluded

DOES NOT COUNT

Retirement accounts — 401(k), IRA, SEP	Restricted or unvested stock
Equity in real estate, businesses, or partnerships	Lines of credit and available credit cards
Business accounts co-owned outside the household	Seller-held or private notes receivable
Personal property — boats, cars, jewelry, art	529 college savings accounts
Borrowed or temporarily transferred funds	

Liquidity means cash you can reach quickly — without penalties, without selling something, and without borrowing.

HOW MUCH CASH YOU NEED STANDING BEHIND THE DEAL

LOAN TYPE	LIQUIDITY GUIDELINE
Acquisition ≤ \$2MM	6–9 months living expenses
Acquisition > \$2MM	3–6% of loan amount
Construction loan	3–6% of loan amount

Post-closing liquidity covers personal emergency reserves, your personal debt, and support for the business during ramp-up or an unexpected issue.

EXAMPLE — \$1,000,000 LOAN	
Loan amount	\$1,000,000
Estimated closing costs	\$30,000
Total project cost	\$1,030,000
Equity injection — 10% of project	\$103,000
Post-closing liquidity — 3% of loan	\$30,000
Or 6–9 months of personal living expenses, whichever is greater.	

USING EVERY AVAILABLE DOLLAR MAY GET THIS DEAL CLOSED AND STOP YOUR GROWTH

BORROWER WHO SPENDS IT ALL

Cash before closing \$140,000 Injection and closing costs (\$103,000) Cash after closing **\$37,000**

Clears the \$30,000 reserve requirement by \$7,000. One vacancy swing consumes it, there is nothing left to inject into a second deal, and nothing to show a lender as cushion.

BORROWER WHO KEEPS A RESERVE

Cash before closing \$240,000 Injection and closing costs (\$103,000) Cash after closing **\$137,000**

Same deal, same terms. This borrower clears the reserve requirement more than four times over and is already underwritable for the next acquisition.

Closing is not the finish line. Plan the injection and the reserve as two separate numbers.

YOUR EXISTING FACILITIES ARE YOUR OPERATING RESUME

Occupancy and revenue trends

Debt-service coverage

Delinquencies

Expense management

Financial reporting
Timely, and it reconciles

Distributions
How much left the business

Whether the projections from your last loan were achieved

Experience only helps if the performance backs it up. Three facilities trending down is a harder file than one facility trending up.

PROFITS LEFT IN THE BUSINESS CREATE FUTURE BORROWING POWER

REINVEST AND RETAIN

Balance sheet strengthens each year Liquidity builds toward the next injection Equity grows without a new partner Coverage ratios improve on their own You look like a lower-risk borrower every cycle

DISTRIBUTE AGGRESSIVELY

Cash flow looks thinner in review No reserve when occupancy dips Next injection has to come from outside We ask where the money went, every time Growth becomes dependent on someone else's capital

Take a reasonable salary. Leave the rest working. Retained earnings are the cheapest equity available to you.

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17

DO NOT BUY A WEAK DEAL SIMPLY TO BECOME AN OWNER

Very little can compensate for a fundamentally weak acquisition.

It constrains global cash flow

A thin facility drags every future calculation down with it.

It consumes your liquidity

Underperformance gets funded out of the reserve you were saving.

It makes the next deal harder

Your operating résumé now opens with a facility that missed projections.

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18

▶

THREE BORROWERS — WHAT DOES THE LENDER SEE?

Borrower A

Net worth \$4,200,000 Liquidity \$60,000
Income: commissions, swings year to year
Personal debt \$6,500 per month Credit score 690 First storage acquisition

Borrower B

Net worth \$850,000 Liquidity \$180,000
Income: W-2 \$190,000, stable three years
Personal debt \$1,900 per month Credit score 762 No ownership experience

Borrower C

Net worth \$6,100,000 Liquidity \$95,000
Three facilities owned Occupancy 88% → 79% Distributions \$700,000 over two years
Reporting arrives late

Which one is closest to approval? Hold your answer.

▶

BORROWER A — STRONG ON PAPER, WEAK IN PRACTICE

THE PROFILE

Net worth \$4,200,000 Liquidity \$60,000 Personal debt \$6,500 per month Annual personal debt service \$78,000 Required household income \$156,000 Credit score 690

WHAT THE LENDER SEES

The injection cannot be funded without selling an asset or borrowing. Post-closing liquidity would be near zero. Commission income does not reliably support \$156,000, so the household test fails in two of the last three years.

Path forward: reduce personal debt, build cash for two to three quarters, or bring a minority partner at 19% or less. The net worth is real — it just cannot make a payment.

▶ Wealthy is not the same as financeable.

BORROWER B — NOT PERFECT, BUT FINANCEABLE



THE PROFILE

Net worth \$850,000 Liquidity \$180,000 W-2 income \$190,000, three stable years Personal debt \$1,900 per month Required household income \$45,600 Credit score 762 No ownership experience

WHAT THE LENDER SEES

Income covers personal debt more than eight times over. The \$180,000 in liquidity funds the \$103,000 injection and closing costs, leaving \$77,000 against a \$30,000 requirement. Credit shows a clean payment history. Global coverage clears 1.25 in year one.

The gap is experience — and SBA financing does not require prior storage experience. Third-party management, a conservatively underwritten deal, and a reserve absorb it.

The smallest net worth in the room, and the easiest file to approve.

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BORROWER C — EXPERIENCED, BUT TRENDING DOWN



THE PROFILE

Net worth \$6,100,000 Liquidity \$95,000 Three facilities owned Occupancy 88% → 79% DSC 1.08 on one facility Distributions \$700,000 over two years Financial reporting arrives late

WHAT THE LENDER SEES

Experience is a genuine strength, and the portfolio proves you can operate. But a facility at 1.08 drags global coverage, occupancy is moving the wrong way, and \$700,000 of distributions removed the cushion that would have absorbed it.

Path forward: stabilize occupancy, slow the distributions for a year, get reporting current, and bring us an explanation with an improving trend behind it.

Nearly every borrower has a weak spot. We need enough strength elsewhere to absorb it.

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FROM SBA BORROWER TO CONVENTIONAL BORROWER

- 01

Use SBA leverage strategically

Low injection, long amortization, no covenants
- 02

Stabilize the acquisition

Occupancy and rate to plan
- 03

Retain earnings

Reasonable salary, rest stays working
- 04

Build liquidity and equity

Cash for the next injection
- 05

Demonstrate operating performance

Clean reporting, projections met
- 06

Qualify for larger conventional loans

More size, tighter terms, your choice of lender

The steps in the middle are the ones borrowers skip. They are also the ones that determine how big the sixth step can be.

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BEFORE YOU GIVE AWAY EQUITY, UNDERSTAND WHAT BANK DEBT CAN ACCOMPLISH

- SBA BANK DEBT

25-year fully amortizing, no balloon payment 0–15% equity requirement 2.6% origination fee Three-year prepayment penalty No prior storage experience required No calls or financial covenants You keep 100% of the upside The obligation ends
- FRIENDS, FAMILY, AND LP CAPITAL

No monthly payment, which is the appeal Priced as a share of every future dollar Dilutes control and decision rights Complicates the next acquisition's structure Ownership below 20% may still count as injection Relationships now carry financial risk The obligation does not end

A 25-year loan is expensive for 25 years. An equity partner is expensive forever.

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BUILD A FINANCING PLAN, NOT A COLLECTION OF LOANS



NEXT 12 MONTHS

Pull your own credit and clear anything reporting late Pay off prior-year taxes — required before a commercial loan Write down your monthly minimum payments and multiply by 24 Separate your injection cash from your reserve cash, on paper Get financial reporting current and reconciled

NEXT 24 MONTHS

Reduce the personal debt that costs you the most capacity Hold distributions below what the business earns Hit the projections you gave us on the last loan Know your global coverage ratio before you make an offer Call your loan officer before the LOI, not after

Bring us the plan for the next three deals. It changes how we underwrite the one in front of us.

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LET'S MAP OUT YOUR NEXT SEVERAL ACQUISITIONS TOGETHER





Anne Mino

Senior Loan Officer

910.409.1830 Anne.Mino@liveoak.bank



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THURSDAY **PRESENTATIONS**

SELF STORAGE ASSOCIATION 2026 FALL CONFERENCE & TRADE SHOW

Handouts for speakers whose presentations are scheduled for Thursday follow this page



SSA WOMEN'S COUNCIL NETWORKING SESSION & BREAKFAST

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Concurrent Educational Session

**SELF STORAGE ODYSSEY 2026:
NAVIGATING AN EVOLVING
MARKET**

TYSON HUEBNER, *YARDI*

Concurrent Educational Session

STOP RACING TO THE BOTTOM: HOW OPERATORS ARE WINNING ON VALUE INSTEAD OF PRICE

MARK CIERI, *STORAGE DEFENDER*

JOHN EISENBARTH, *WEST COAST STORAGE*

DARREN KELLEY, *RIGHT MOVE STORAGE*

ALYSSA QUILL, *STORAGE ASSET MANAGEMENT*

Concurrent Educational Session

BUY IT RIGHT, SELL IT BETTER: FROM ACQUISITION TO EXIT — THE SELF STORAGE PLAYBOOK FOR CREATING VALUE

KRISTEN ASMAN & MEREDITH MEARS
SVN COMMERCIAL REAL ESTATE

OPENING GENERAL SESSION

NO LONGER UNDER THE RADAR: RESPONDING TO THREATS IN AN ERA OF INCREASING REGULATION

JOE DOHERTY, *SELF STORAGE ASSOCIATION (Moderator)*

CHESTER BALDWIN, *LOBBY WASHINGTON*

DANIEL BRYANT, *SELF STORAGE ASSOCIATION*

JAMES COAKLEY, *TREASURE ISLAND MANAGEMENT*

JOHN LA RAIA, *A-1 SELF STORAGE*

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This year we honor



Mike McGowan
Public Storage



Bill Hobin
*The William Warren
Group / StorQuest Self
Storage*

FEATURED SPEAKER

ROB RIGGLE





YLG Educational Session

(Requires membership in the YLG. Membership is free for 2026)

HOW INDUSTRY CHANGE IS RESHAPING LEADERSHIP ACROSS SELF STORAGE

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HOW INDUSTRY CHANGE IS RESHAPING **LEADERSHIP** ACROSS SELF-STORAGE



MIKE GONG
Arthur J. Gallagher



JESSIE LAMB
NodaFi



LUKE ELLIOT
Cushman & Wakefield



ALONNA ROSS
Storable

A conversation about the future of the industry.



Concurrent Educational Session

AI FRAUD DETECTION FOR SELF STORAGE

JOE MARUCCI, *SELF STORAGE MANAGER*
BO WRIGHT, *STRIPE*



AI Fraud Prevention for Self-Storage

Presented by:

Joe Marucci, SSM - Vice President Software Engineering

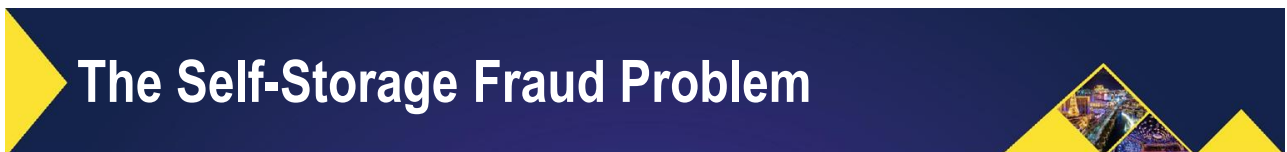
Bo Wright, Stripe Global Platforms

Self Storage Manager / Stripe

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1



Sample scenario — not a specific facility or event.

It's the third Monday of the month, and the chargeback report just landed. Six disputes.

- Three of them on units nobody's physically checked in weeks
- A stolen card rented a unit online at 2 AM.
- A refund request on a unit rented four days earlier, citing a 'family emergency.'
- An autopay charge disputed by someone who swears they closed the account months ago.

None of it looked like fraud — it only became a pattern once someone pulled the numbers together. By then, the units were empty, the cards were gone, and the losses were already booked.

So how did this happen?

Self-storage isn't usually the target - it's path of least resistance.

Self Storage Manager / Stripe

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2

The industry landscape

AI is accelerating the rise of fraud and increasing cost to fight

46%

more revenue lost in 2025 across all industries

Fraudulent actors are using AI to make their fraud schemes more sophisticated by scaling attacks and generating synthetic identities.

94%

of businesses have experienced first-party abuse

First-party abuse and other new fraud vectors are on the rise. Traditional tools make it hard for your business to keep pace.

\$5.75

cost to businesses for every \$1 in revenue lost due to fraud

While fraud continues to increase, it's also becoming more costly than ever to manage.

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3

Fraud Landscape: Common Patterns

**Stolen Card Rentals**

Fraudster uses stolen card to rent online, moves in immediately. Physical access granted before the chargeback arrives — often 30–60 days later.

**Card Testing / Enumeration**

Small \$1–\$5 auth charges probe whether a card is live. Self-storage online rental forms are frequently targeted due to low average ticket awareness.

**Prepaid Card Schemes**

Untraceable prepaid Visa/MC used to rent unit for illegal storage or subletting. No chargeback risk to the fraudster — they vanish.

**Synthetic Identity Fraud**

Fake name + real stolen SSN fragments create a plausible-looking tenant. Passes basic ID checks, rents multiple units across locations.

**Chargeback Abuse**

Legitimate card, fraudulent dispute. Tenant accesses unit, files dispute claiming, 'service not received.' Friendly fraud accounts for 40–60% of disputes.

**Velocity / Account Takeover**

Stolen account credentials (prior breach) used to modify payment method. Fraudster redirects autopay to stolen card before operator notices.

Delinquent Access: a delinquent tenant sometimes settles up with a stolen card, just to avoid losing access.

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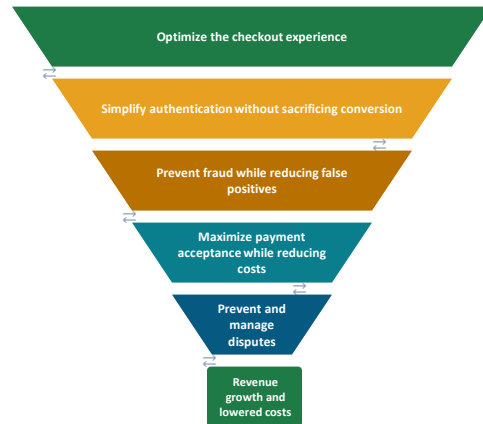
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4

Fraud Prevention Funnel

To protect margins, payments need to evolve from siloed decisions to holistic optimizations across the full funnel



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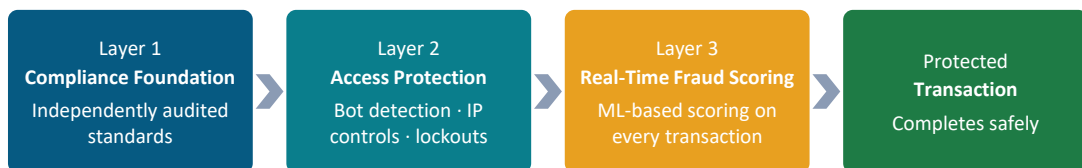


5

Protecting You and Your Payments

Payment security isn't a single feature — It's multiple independent layers working together, each covering what the others can't catch. **Compliance** standards set the foundation, **access** controls guard the account, and **real-time fraud** scoring **protects** every transaction as it happens.

Sample Layers of defense — each one catches what the layer before it can't



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6

Rules Engine vs. Machine Learning

Rules-Based Detection

"If X, then block"

- You manually write rules: "Block prepaid cards" or "Flag transactions over \$500"
- Only catches patterns you've already seen and coded
- Every new fraud type requires a new rule — constant maintenance
- Too many rules = real customers get blocked (false positives)

AI/Machine Learning Detection

"Learns from billions of signals"

- Scores every transaction in real-time using 1,000+ signals (device, location, card history, velocity, behavior)
- Detects new fraud patterns automatically — even ones you haven't seen
- Gets smarter over time: trained on millions of businesses across Stripe's network
- Fewer false positives — real tenants don't get blocked

Best Together

AI handles the heavy lifting automatically. Rules let you add business-specific logic on top — like 'always require ID for units over 200 sq ft.' You get both intelligence AND control.

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Stripe Radar's AI: Under the hood

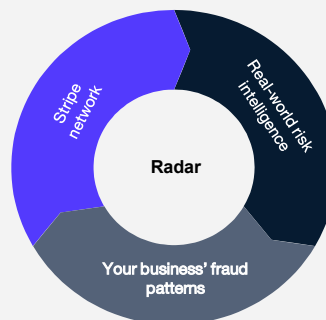
Stripe Radar's AI uses hundreds of signals to predict risk scores

Models ingest hundreds of signals

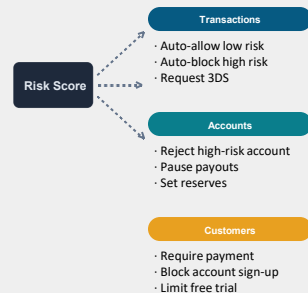
Continuous evaluation of high-fidelity data:

- Account data
- Customer data
- Payment data
- Device data
- Timing data
- Frequency and velocity data
- Behavioral data

Models predict risk score



Risk score and dynamic settings dictate decisioning



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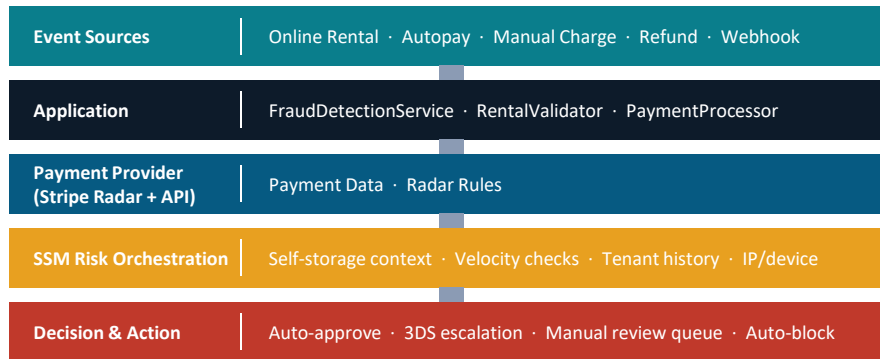
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SSM Fraud Agent



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Defined Fraud Events

Every touchpoint where the agent observes, scores, and acts — grouped by category

Payment Lifecycle

- First payment authorized
- Payment captured
- Recurring autopay processed
- Payment method changed
- Refund issued

Dispute & Chargeback

- Chargeback received
- Dispute won/lost

Authentication & Verification

- 3DS challenge triggered
- Failed CVC on retry

Identity & Account Risk

- IP geolocation mismatch
- Email domain risk
- Prepaid card detected
- Prior fraud on tenant account

Behavioral Anomalies

- Move-out < 4 hrs of rental
- Multiple units same card
- Unusual rental hours
- Large unit + short-term intent

Human Oversight

- Manual staff override

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Balancing Customer Friction

The goal isn't to put friction on every rental. The goal is to put the right friction on the right rental.

OBSERVE

One Rental, Multiple Signals

- Payment method changed
- IP geolocation mismatch
- Retry after a failed attempt
- Move-out within hours of move-in
- Account is Delinquent

COMBINE

Risk Score

- No single signal proves fraud on its own
- Together, they reveal the pattern early — before a chargeback ever lands

DECIDE

Response

- Low risk → no challenge
- After a failed attempt → 3DS / CAPTCHA
- Refund requested + elevated risk → always challenge
- Delinquent account → always challenge

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Fraud Health Checklist

Ten questions every self-storage operator should answer



Identity & Onboarding

- ☐ ID verification consistent across staff and locations?
- ☐ Same card or ID flagged across multiple units?



Payment Method Controls

- ☐ New cards screened before acceptance, no exceptions?
- ☐ Prepaid cards accepted without extra scrutiny?
- ☐ Payment method changes tracked before disputes?



Behavioral Red Flags

- ☐ Move-out within hours of move-in tracked?
- ☐ Unusual timing or rapid-fire rentals visible?



Detection & Response

- ☐ Staff can escalate a transaction before it's approved?
- ☐ Chargeback ratio and dispute reasons tracked over time?
- ☐ Documented next steps once fraud is confirmed?

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Q&A



Thank You!

Contact: Joe Marucci

Email: jmarucci@selfstoragemanager.com

Contact: Bo Wright

Email: bo@stripe.com

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**CONVERGENT STORAGE
DEVELOPMENT: DESIGNING
THE NEXT ERA OF SELF
STORAGE**

**JAMES REID, *FLEX SPACE NATION*
SARAH SWINGLER, *MAKORABCO***

Concurrent Educational Session

**STATE OF THE SELF STORAGE
MARKET**

JOHN CHANG & STEVEN WEINSTOCK
MARCUS & MILLICHAP

Concurrent Educational Session

**SEVEN QUESTIONS, SEVEN
ANSWERS, SEVEN MINUTES
EACH**

JEFFREY GREENBERGER
GREENBERGER & BREWER



Seven Questions, Seven Answers, Seven Minutes Each

Jeffrey Greenberger
Greenberger & Brewer, LLP
Late2Lien, LLC

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A Caveat

The information I provide today is general in nature and represents the opinion of the presenter.

Do not make changes to your rental agreement, forms and other procedures without consulting your own legal counsel.

I am licensed to practice law in Ohio and Kentucky.

This Presentation does not constitute the establishment of an attorney client relationship.

REVIEW the existing clauses in your rental agreement to make certain you aren't creating conflicts.

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1. I Took A Credit Card Late, Then It Got Disputed Now What?

Credit cards used to make payments late in the lien process have an extraordinarily high dispute rate.

This is the new scam, just check Reddit.

Define in your rental agreement all of your payment terms and conditions, including any technology-imposed limitations, so there are no accusations mistreatment.



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2. Do You Do What You Say?

“Fool me once shame on me, fool me twice, I’ve created a waiver”

If your rental agreement states a date you overlook or deny gate access, do it that day.

If your rental agreement states fees and charges, impose them for all.

This is especially true for late fees, the IRS believes when too many are waived, operators are actually pocketing cash.

Time's up!

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Don't Say It If You Don't Mean It

If you have provisions in your rental agreement you never enforce, take them out.

Especially if these provisions could lead to consumer protection violations or lawsuits. Examples include:

Fees you no longer charge;

Cross collateralization;

Partial payments do not stop lien proceedings.



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3. What Should I Say About Insurance ?

Many of you have some sort of automatic opt in to an insurance or protection plan you offer at the facility. If you offer something, say so.

However, in today's insurance environment, who is willing to turn a few thousand dollar claim over to their homeowners insurance company?

If the occupant suffers a loss and all they have is their homeowners insurance and are unwilling to submit a claim, then what?



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4. What Are The Best Use Of Rules And Regulations?

From where to park, office and gate hours, to things you never dreamed of, such as no tailgate parties, the rules and regulations help you operate the Facility without repetition of the rental agreement.

Separate from the rental agreement, but incorporated in, by reference.

Do not get occupant to sign the Rules and Regulations, we want to be able to use them as a “quintessential” document.



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5. What's The Military Question, Why Does It Matter?

SCRA answers that are wrong lead to a lot of liability:

This is governed by a federal law: the Servicemembers Civil Relief Act (SCRA). You are required to ask affirmatively if the person renting from you is active-duty military.

This includes all military service branches, National Guard, Reserves; and some uniformed responders from the National Institutes of Health and National Oceanic and Atmospheric Administration.

You are also required to inquire if the Occupant is a dependent of someone who's active duty. Arguably, dependents are entitled to the same protections under the Act.



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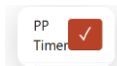
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6. Can A Class Action Waiver/ADR Clause Protect Me?

We continue to see class action lawsuits filed against storage facilities. Put up a roadblock to filing a class action lawsuit (although not always enforced.)

These include a specific waiver of the right to participate in a class action lawsuit and a mandatory arbitration clause.

Although it does not block a class action, consider mandatory mediation as well.



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7. What's The Risk With Lithium Batteries?

Strongly consider regulating or prohibiting their storage.

Do not allow charging, or if you must, then limit the number of hours per day that electricity is available. Plus, require items to be UL listed.

It isn't just the fire hazard, when lithium batteries explode, they create a toxic mess that will need to be remediated beyond fire damage.

Airlines now have all sorts of new rules for spare lithium batteries and use of power banks on airplanes.

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QUESTION & ANSWER TIME

Settings

12

Thank You For Attending The 2026 Fall Conference

Please Feel Free To Visit Me At The Late2Lien Booth # 1419

Jeffrey Greenberger

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[@SelfStorageLaw](#)

www.Late2Lien.com

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Concurrent Educational Session

FUTURE-PROOFING SELF STORAGE: TENANT BEHAVIOR, GLOBAL TRENDS, AND THE NEXT ERA OF STORAGE

KIMBERLY ROBINSON, *OPENTECH ALLIANCE (Moderator)*

PEDRO FLORIDA, *TROJAN STORAGE*

TROY RUMBELOW, *STORHUB AUSTRALIA*

PATRICK VANDERPOOL, *STORHUB APAC*



Future-Proofing Self Storage

Tenant Behavior, Global Trends, and the Next Era of Storage

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Kimberly Robinson
OpenTech Alliance

VP of Marketing



Pedro Florida
Trojan Storage

President



Patrick Vanderpool
StorHub Self Storage

Chief Operating Officer



Troy Rumbelow
StorHub Australia

**Head of Development
& Construction**

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Future-Ready ≠ Fully Automated

Future-proofing isn't predicting what comes next. It's building an operation flexible enough to respond when what comes next arrives.

Tenant Expectations



Operating Economics



Technology

Audience Poll

- How many are primarily managing existing / legacy facilities?
- How many are developing new facilities?
- How many are currently operating any hybrid, remotely managed or unmanned locations?

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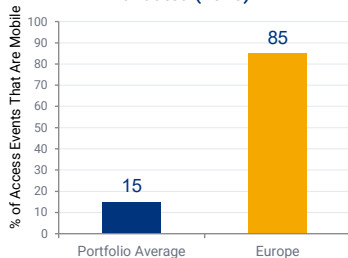
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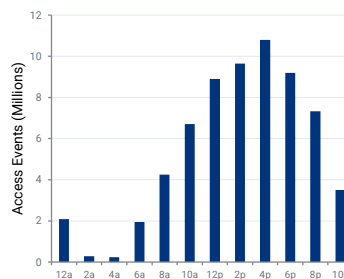
Tenant Signals & Behavior

Mobile Access: Optional vs. Mandated (2025)



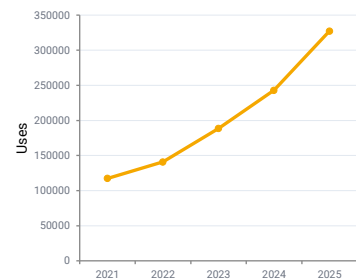
15% when it's a choice. 85% when it's largely the only option

Access by Hour of Day (2025)



43% of all visits occur after hours (5pm–9am, Su–Sa)

Text Me My Code Usage (5-Yr)



Up 179% since 2021

Source: OpenTech Access Data, 2021-25

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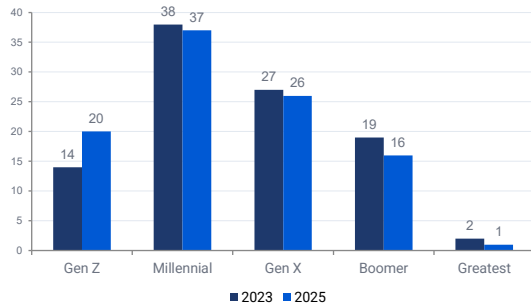
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Who's Renting, & What They Expect

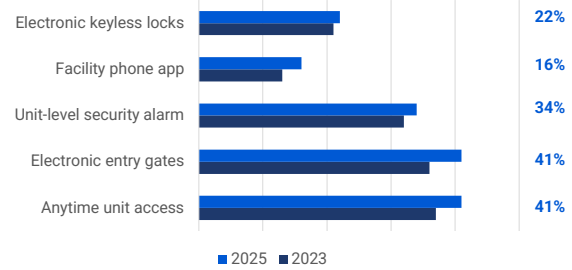
Who's Renting Storage (2023 vs. 2025)



Gen Z + Millennial = 57% of renters in 2025, up from 52% in 2023

Source: SSA Demand Study, 2023; 2025

What Renters Will Pay Extra For (2023 vs. 2025)



Willingness to pay is UP across almost every feature vs. 2022 – most notably electronic gates (+5 pts)

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Four Starting Points – Same Industry



Extra Store
2 stores
Ireland/SA



StorHub Self Storage
180+ properties
6 APAC countries

StorHub Australia
12 properties
2024 entry



Trojan Storage
56 properties
6 U.S. states



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Panel Round 1

What Problem Are You Actually Solving?

Customer
Experience

Efficiency

Risk

Flexibility

Takeaway: Similar challenges. Three different investment cases.

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Panel Round 2

Build It In or Retrofit It Later?

NEW DEVELOPMENT

StorHub Australia/Extra Store

StorHub Australia/Extra Store
Infrastructure decided
from day one

EXISTING ASSET

Trojan Storage/StorHub Asia

StorHub Asia
Where retrofit ROI
gets difficult

Trojan Storage
Sequencing an existing
portfolio retrofit

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Panel Round 3

Fewer Hours on Tasks. Sharper Focus on Tenants.

Systems are good at:

- Routine
- Repeatability
- Rules-based
- Always-on

People are good at:

- Judgment
- Exceptions
- Relationships
- Complex decisions

56%

of support calls in 2025 needed real human judgment — 44% were routine enough to automate

30–50%

reduction in daily onsite labor hours at converted locations (12 → 6 hrs)

~1/3

of Trojan's portfolio now operates under a caretaker / hybrid model

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Grant Daniel

Owner, Extra Store Storage

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Panel Round 4

**TROJAN
STORAGE**

Show Me the ROI

Reduce Expense

30–50%

reduction in daily onsite labor hours at converted locations

~1/3

of portfolio transitioned to caretaker / hybrid operation

Create Revenue

\$5–\$10

monthly Tech Fee per occupied door

Increase Flexibility

~35–40%

of rentals completed without onsite employee interaction

Reduce Risk

Theft / burglary has fallen to zero or near-zero at technology-enabled projects, against a five-year portfolio baseline that includes 1,277 burglary/theft incidents.

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Panel Round 5

From Access Data to Operating Intelligence

What happened?

Why did it happen?

What should I do?

Access + booking + payment + pricing + device activity

Security

Staffing

Retention

Pricing

Customer
Experience

AI can make it easier to find patterns in all of this data. But AI is much less useful if your systems aren't connected and the data isn't there in the first place.

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What Makes an Operation Future-Ready?

Before any major decision, consider:

Tenant	Does this remove friction or meet a changing customer expectation?
Team	Does it eliminate low-value work or help people perform higher-value work?
Facility	Does it improve revenue, cost, risk or operational visibility?
Measurement	Will I know whether it actually worked?

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Q&A



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Concurrent Educational Session

THE PINK LADIES OF MARKETING: 5 YEARS LATER—TRENDS, TACTICS & AI THAT MOVE THE NEEDLE

CHRISTINA ALVINO, *STORSUITE*

HOLLY FIORELLO, *GROWTH GUIDE MARKETING*

JESSICA JOHNSON, *THE STORAGE GROUP*

STACIE MAXWELL, *SECURELEASE*

MELISSA STILES, *STORAGE ASSET MANAGEMENT*

Concurrent Educational Session

REVENUE LEAKAGE: WHAT YOUR 20+ YEAR-OLD FACILITY IS REALLY COSTING YOU

**TRAVIS MORROW, *NATIONAL SELF STORAGE/STORELOCAL*
CARL SMITH, *JANUS INTERNATIONAL***

Concurrent Educational Session

**HOW TO INVEST IN SELF
STORAGE: 2026 (AN AI-
GENERATED
PRESENTATION)**

RK KLIEBENSTEIN
SELF-STORAGE, LLC



2026 Fall Conference & Trade Show



HOW TO INVEST IN SELF STORAGE: 2026

An AI-Generated Presentation

R.K. Kliebenstein • Self-Storage, LLC

DEVELOP • ACQUIRE • HOLD • SELL

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2026 Fall Conference & Trade Show



Artificial Intelligence & the Future of Self-Storage Investment

- RK Kliebenstein | President, Self-Storage, LLC | Coast-to-Coast
- SSA Fall Conference & Trade Show | September 8-11, 2026

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- **RK Kliebenstein — Over 40 Years in Self-Storage**
 - President, Self-Storage, LLC (Coast-to-Coast Consulting)
 - Nationally recognized consultant, author & speaker
 - Expert in acquisitions, development, feasibility & brand strategy
- **Core Areas of Expertise**
 - Facility valuations, market studies & feasibility analysis
 - Investment strategy for REITs, private equity & private operators
 - AI-driven operational efficiency & yield optimization
- **Today's Mission: Help you invest smarter in the AI era**

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“Most people lose money in self storage before they ever break ground.”

CAPITAL

Tighter and more selective

OPERATIONS

Institutional standards

CUSTOMER

More informed and digital

EXIT

Planned from day one

The rules did not disappear. The penalty for weak assumptions got larger.

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4

DEVELOP OR ACQUIRE? START WITH HOW CAPITAL IS DEPLOYED

ACQUIRE

Capital committed at closing
Immediate in-place cash flow
Known operating history
Basis and upside are the fight

DEVELOP

Capital committed over time
No revenue during construction
Entitlement / cost / lease-up risk
Higher return must pay for time

A higher projected yield is not automatically a better investment.

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2026 IS A DISCIPLINE CYCLE — NOT A “BUY EVERYTHING” CYCLE

TIGHTER CAPITAL

HIGHER HURDLES

BETTER DATA

FEWER
“EASY”
DEALS

The opportunity is real only when the basis, location, downside and execution all work together.

BUY

When the basis survives stress and there is executable upside.

BUILD

When yield-on-cost clears time, lease-up and construction risk.

SELL / HOLD

Compare after-tax proceeds and reinvestment options—not emotion.

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SQUARE FEET PER CAPITA IS A SUPPLY METRIC — NOT A DEMAND VERDICT



Feasibility is a mosaic. No single ratio gets to make the investment decision.

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LOCATION IS THE VARIABLE YOU CANNOT FIX LATER

THE 10-SECOND LOCATION TEST



- Visibility and approach speed
- Access and turning movements
- Retail gravity / customer travel patterns
- The site cannot be rescued by software or marketing

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BUILD A HURDLE RATE THAT ACTUALLY PRICES RISK

REQUIRED RETURN



The hurdle rate is the price of saying "yes." Define it before you fall in love with the deal.

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THE PERSON SELLING THE DEAL SHOULD NOT BE THE ONLY PERSON GRADING IT



STRESS THE ASSUMPTIONS

- Rents and concessions
- Occupancy and absorption
- Expense growth
- Capital plan and timing
- Exit cap rate / buyer demand

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LIQUIDITY IS PART OF THE RETURN

DIVERSIFIED REVENUE

Hundreds of individual customers reduce single-tenant concentration risk.

ILLIQUID ASSET

You cannot sell a building on Friday afternoon to solve Monday morning's problem.

CASH RESERVES

Liquidity protects the investment when capital needs arrive before the plan says they should.

Do not confuse a stable revenue stream with a liquid balance sheet.

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CONSTRUCTION COST BENCHMARKS ARE NOT A CONSTRUCTION BUDGET

WHAT THE "\$/SF" NUMBER HIDES

LABOR

Market depth & wage pressure

MATERIALS

Steel, doors, MEP, lead times

SITE

Soils, grading, drainage

CODES

Fire, access, local requirements

TIME

Carry, delay, escalation

BENCHMARK

≠

BID / BUDGET

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12

LEASE-UP SPEED MAY BE THE CHEAPEST CAPITAL YOU CAN DEPLOY

LEASE-UP



MARKETING + LOCAL DEMAND + MANAGER EXECUTION

Six months faster to stabilization can matter more than a small “value-engineering” win.

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TECHNOLOGY IS NOW OPERATING INFRASTRUCTURE



Digital reduces friction only when systems share accurate information.

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MAINTENANCE IS CHEAPEST BEFORE IT BECOMES AN EMERGENCY



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15

LEGAL PROCESS IS AN INVESTMENT RISK — NOT AN ADMIN TASK



One broken link can contaminate the entire process.

- Correct tenant data
- Correct statutory timing
- Correct notices and records
- Counsel when facts are not routine

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16

ALIGN PEOPLE WITH THE ECONOMICS OF THE ASSET

CLEAR TARGETS

Occupancy • revenue • collections • reviews • local marketing

VISIBLE SCORECARD

Managers should know what “winning” means this month—not after year end.

SHARED UPSIDE

When the facility exceeds the plan, incentives can make execution everyone’s problem.

Operations belongs at the investment table because execution changes the return.

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17

THE PANDEMIC WAS A STRESS TEST — NOT AN INVESTMENT THESIS

SHOCK → ADAPT → OPERATE → LEARN

WHAT HELD UP

Monthly leases • diverse customers • low staffing requirements • flexible systems

WHAT CHANGED

Online rental • remote access • digital service • centralized support

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18

PROPERTY TAXES AND COST SEGREGATION: MODEL THE AFTER-TAX REALITY

PROPERTY TAX

Assume reassessment risk is real. Underwrite the likely post-transaction burden.

COST SEGREGATION

Engineering-based classification may accelerate depreciation on qualifying components.

INVESTOR-SPECIFIC

The tax benefit depends on who owns it, how it is held and how long it is held.

Tax strategy can improve a good investment. It should not rescue a bad one.

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EXIT READINESS STARTS WITH CLEAN T-12 FINANCIALS

BUYER LENS

T-12
FINANCIALS

NORMALIZED
NOI

CAPEX /
DEFERRED
ITEMS

LEASE /
TENANT DATA

ASSUMPTIONS
& SUPPORT

Your eventual buyer will grade the records you create today.

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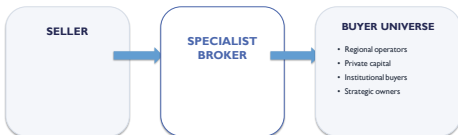
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A SPECIALIST BROKER CREATES A MARKET — BUT CANNOT CREATE THE NUMBERS



Process can improve price discovery. It cannot fix weak NOI.

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DUE DILIGENCE: VERIFY THE ASSUMPTIONS THAT CREATE THE VALUE

- ✓ **RENTS** Are asking, achieved and in-place rents reconciled?
- ✓ **EXPENSES** What is normalized, deferred or owner-specific?
- ✓ **CAP RATE** What market evidence supports the exit assumption?
- ✓ **BUYER DEMAND** Who is the likely buyer and what will they underwrite?

Independent verification is cheaper than discovering the truth after closing.

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THE MOST PROFITABLE DEVELOPMENT MAY BE THE ONE YOU DID NOT BUILD



Every metric must survive in context. One great number does not rescue one fatal flaw.

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23

DEVELOP • ACQUIRE • HOLD • SELL — USE THE SAME DISCIPLINE

DEVELOP

Yield-on-cost clears construction + time risk

Location and local demand are exceptional

ACQUIRE

Basis survives stress; upside is executable

Cash flow begins now and history is knowable

HOLD

After-tax return on current equity remains attractive

Operational upside is not fully harvested

SELL

Market will pay more than your risk-adjusted hold value

Capital has a better next use

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24

SHOULDA... WOULD... COULDA...?

OPPORTUNITY

VS.

REGRET

BASIS

LOCATION

UNDERWRITING

EXECUTION

EXIT

The deal earns the “opportunity” label only after the assumptions survive scrutiny.

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MEMBERS • LEAD • INSIDE • OUTSIDE

25

INSTITUTIONAL STANDARDS ARE NOT JUST FOR INSTITUTIONAL OWNERS

REPORTING

Clean, timely, comparable

UNDERWRITING

Repeatable and independent

OPERATIONS

Measured and accountable

CAPITAL

Reserves + disciplined reinvestment

EXIT

Prepared before the sale process

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13

FIVE RULES TO TAKE HOME

- 1 Do not fall in love with the site.
- 2 Price time, liquidity and execution risk.
- 3 Make operations grade the underwriting.
- 4 Keep enough cash to survive being wrong.
- 5 Prepare the exit before you need the exit.

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27

WHAT WILL THE CLONE ADVISE?

DEVELOP?

ACQUIRE?

HOLD?

SELL?

ASK THE QUESTION. THEN VERIFY THE ASSUMPTIONS.

Questions & Discussion

- RK Kliebenstein | rk@askrk.com | 561 797-2721
- Self-Storage, LLC | askrk.com

Self-Storage, LLC 561 797-2721 rk@askrk.com

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FRIDAY **PRESENTATIONS**

SELF STORAGE ASSOCIATION 2026 FALL CONFERENCE & TRADE SHOW

Handouts for speakers whose
presentations are scheduled for Friday
follow this page

Concurrent Educational Session

STEAL THESE IDEAS: A SPEED ROUND OF THE BEST IDEAS IN SELF STORAGE OPERATIONS

MARK POOLE, *JUSTSTORAGE (Moderator)*

BEN HENDRICKS, *FIVE STAR STORAGE*

CRAIG OLINGER, *HIGHLINE STORAGE PARTNERS*

JOEL PATTERSON, *PERSONAL MINI STORAGE*



Steal These Ideas

A Speed Round of the Best Ideas in Self-Storage Operations

Friday, September 11 | 8:00 to 8:45 AM

Mark Poole
JustStorage

Craig Olinger
Highline Storage Partners

Joel Patterson
Personal Mini Storage

Ben Hendricks
Five Star Storage

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Meet the Panel

Mark Poole

VP of Operations, JustStorage (Moderator)

Craig Olinger

Chief Marketing Officer, Highline Storage Partners

Joel Patterson

Senior Vice President of Operations, Personal Mini Storage

Ben Hendricks

CEO, Five Star Storage

Mark Poole
JustStorage

Craig Olinger
Highline Storage Partners

Joel Patterson
Personal Mini Storage

Ben Hendricks
Five Star Storage

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Speed Round

45 minutes.

5 topics.

Real ideas you can use Monday.

- **Sales**
- **Marketing**
- **Team Building**
- **Customer Service**
- **Operational Quality**

Mark Poole
JustStorage

Craig Olinger
Highline Storage Partners

Joel Patterson
Personal Mini Storage

Ben Hendricks
Five Star Storage

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Thank You

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Ben Hendricks
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Concurrent Educational Session

**THE INDUSTRY IS ON
FIRE...LITERALLY!**

**REAL CLAIMS. REAL LOSSES. REAL
LESSONS FROM SELF STORAGE
OPERATORS**

JENNY BORTMAN, *UNIVERSAL INSURANCE PROGRAMS*

DANIELLE KIFER, *TIERRA CORPORATION*

JESSICA LAMOUREUX, *WORLD INSURANCE*

ALYSSA QUILL, *STORAGE ASSET MANAGEMENT*

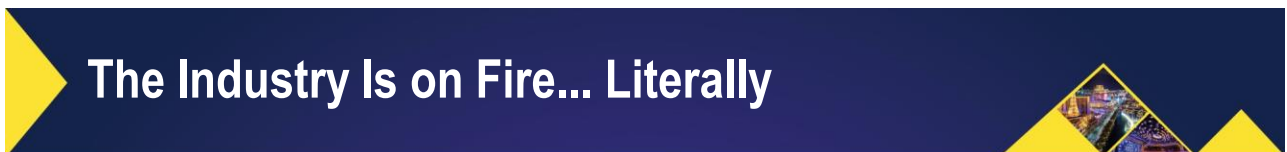


The Industry Is on Fire... Literally

Real Claims. Real Stories. Real Lessons Every Self-Storage Operator Needs to Hear.

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1



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2

The Industry Is on Fire... Literally



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3

2026 Fall Conference & Trade Show



The Industry Is on Fire... Literally

Real Claims. Real Stories. Real Lessons Every Self-Storage Operator Needs to Hear.

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4

The Industry Is on Fire... Literally



Miami Herald

NEWS SPORTS REAL ESTATE EPSTEIN POLITICS OPINION GAMES OBITUARIES CAREERS BANKING GUIDES

\$1.99 FOR 1 MONTH Start reading the stories that matter most in your community.

FLORIDA

Stolen excavator was driven through 2 buildings, including Walmart, Florida cops say

By Mark Price

Updated September 12, 2023 1:23 PM | [Gift Article](#)



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Participate. Learn. Benefit. Succeed.

5

The Industry Is on Fire... Literally



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6



The Industry Is on Fire... Literally

Real Claims. Real Stories. Real Lessons Every Self-Storage Operator Needs to Hear.

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7

The Industry Is on Fire... Literally

True of False

My tenants all have insurance so I don't need to worry about it.

FALSE

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8

The Industry Is on Fire... Literally

True of False

My cameras will protect me from lawsuits.

FALSE

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9

The Industry Is on Fire... Literally

True of False

Fire extinguishers solve lithium battery fires.

FALSE

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10

The Industry Is on Fire... Literally

True of False

Older facilities have more losses.

TRUE

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11

The Industry Is on Fire... Literally

True of False

Insurance Matters!!!

TRUE

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12

The Industry Is on Fire... Literally

Q & A

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13

The Industry Is on Fire... Literally



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jessicalamoureux@worldinsurance.com



dkifer@tierracorp.com



aquill@storageasset.com

See Something... Say Something!



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Concurrent Educational Session

THE NEW PLAYBOOK FOR SELF STORAGE MANAGEMENT: ACTIVE, REMOTE, AND ON-DEMAND

BRETT COPPER, *COPPER STORAGE MANAGEMENT*
ADAM WAGNER, *ANYTIME STORAGE*

Concurrent Educational Session

**TALENT ACQUISITION,
RETENTION AND COMPENSATION**

CHASE FRYHOVER
HIREWELL

LOOKING FOR NEW TALENT?

4 EASY STEPS TO HELP YOUR SEARCH

1

ONE-TIME REGISTRATION

Go to www.etest.net/ss-sign-up to register, then scroll to the bottom of the page and click the “Submit” button. An email will be sent within **one business day** with your log-in information, instructions and site link.

2

LOG IN & SET UP TEST

Go to www.etest.net and enter your login information. Click on “Create New Assessment” to **set up a test for your candidate**.

3

CANDIDATE TAKES TEST

It only takes 20-30 minutes!

Candidate can take the test in-house (proctored is preferred) or remotely from any location.

1

ONE-TIME REGISTRATION



2

LOG IN & SET UP TEST



3

CANDIDATE TAKES TEST



4

GET SCORE



How does
eTest®
work?

4

GET SCORE

Results are sent via email to owner-operator/hiring manager for more focused and effective interviews. Feedback is sent in an Interview Guide which consists of:

- Narrative description
- Suggested interview questions
- Scores placed on a good/bad fit facility manager scale



eTest.net





Attracting & Retaining Talent in Commercial Real Estate

Presented by:
Chase Fryhover,
Director, Real Estate Practice
Hirewell



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1

Challenges Faced by Organizations

- Identifying the best talent
- Attracting the best talent
- Long-term retention of high performers



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2

Identifying the Strongest Candidates

Clearly defining what makes a strong candidate for your organization

- Demonstrated Professional Experience
- Knowledge of Asset Class
- Geographic Expertise
- Industry Relationships
- Education
- Relevant Certifications



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3

Identifying the Strongest Candidates

Consideration of Candidate Availability

- Are the best candidates currently employed?
- Are candidates between positions a less desirable option?
- Organizational tolerance to compete for the strongest candidate



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4

Attracting the Strongest Candidates

What Makes Your Opportunity Attractive?

- What is unique about your organization?
- What separates you from your competition?
- What does your hiring process convey about your organization?
- Remote/Flex Work



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5

Attracting the Strongest Candidates: Compensation

Candidate Consideration of New Opportunities

- Typical job seeker motivated by 15-20% salary improvement
- Improvements to PTO
- Improvement to work/life balance
- Additional incentives, bonus opportunities, equity stake
- Geographic Improvement
- What the candidate will be walking away from (performance bonus)



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6

Attracting the Strongest Candidates: Compensation

Determining a Competitive Compensation Package

- Invest in a customized Compensation Study
- Insight into compensation packages offered by competitors
- Consider what will set your organization apart
- Establish a clear pathway for future compensation improvements
- Address budget constraints with creative solutions
 - Hybrid Arrangements
 - Improved Title



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7

Attracting the Strongest Candidates: Recruiting Process

Your Recruiting Process is a Reflection of the Organization

- Clearly defined organizational needs
- Readily available Job Description
- Establish a timeline
- Be prepared to communicate what makes your organization unique
- Streamline interviewing process
 - Who will be your decision maker(s)?
- Be prepared to move on the right fit for your organization



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8

Retaining Top Talent

Communicating a Career Path in Your Organization

- Outline a path for growth and advancement
- Set clear and achievable goals for their current role
- Establish a benchmarks for advancement
- Regularly schedule meetings to evaluate job performance
- Address deficiencies early and provide constructive feedback
- Recognize wins and improvements



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9

Retaining Top Talent: Professional Growth

Develop Internal Talent

- Involve your team in other facets of the organization, where appropriate
- Increase exposure to multiple functional areas of the organization
- Provide opportunities to cross-train on software/tools
- Grow responsibilities
- Reward demonstrated growth and performance
- Mentoring Programs within your organization



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10

Retaining Top Talent: Company Culture

- Give team members a voice in the organization
- Welcome feedback; make adjustments when necessary
- Celebrate wins and milestones
- Provide flexibility and work-life balance
- Foster collaboration
- Continuous Improvement
- Team building events
- Community outreach opportunities



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11

Retaining Top Talent: Company Culture

Leadership

- 2025 iHire Talent Retention Report: Reasons for Leaving
 - Toxic/negative work environment (26.8%)
 - Poor Leadership (24.2%)
 - Dissatisfaction with Manager (22.8%)
- Are you providing a pathway for growth?
- Are you fostering open communication?
- Are you checking-in with employees routinely?
- Are you following through when actionable feedback is provided?



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12

Retaining Top Talent: Company Culture

Remote Work Landscape

- 2025 Survey of 1,000 employed Americans
 - 55% of in-office employees would accept a pay cut for remote or hybrid work
 - Average acceptable pay reduction of 11%
- Feasibility of remote/hybrid work for your organization
- Clearly articulated policies for remote/hybrid work
- Consideration of how teams will be forged and managed in a remote environment



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13

Final Thoughts

Current Trends in Commercial Real Estate Recruiting

- Operations-Focused Roles Leading
 - Asset Management
 - Construction
 - Accounting/Finance
- Upside/Growth Roles Lagging
 - Acquisitions
 - Capital Markets
 - Development
- Candidate Supply vs. Demand



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14

Questions

- What hiring challenges has your organization recently faced?
- What challenges have you faced as a candidate?
- Any topics you would like to discuss further?



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Concurrent Educational Session

MAKING THE PARTNERSHIP WORK: COMMUNICATING EFFECTIVELY WITH THIRD-PARTY MANAGEMENT COMPANIES

DAVE DEEMS, *STORAGE ASSET MANAGEMENT (Moderator)*

CHRISTINA ALVINO, *STORSUITE*

DEVIN CROW, *CUBESMART*

RK KLIEBENSTEIN, *SELF-STORAGE LLC*

ALYSSA PARKER, *THE WILLIAM WARREN GROUP*



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How to Communicate Effectively with Third-Party Management Companies



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1

Session Overview

- Focus on effective owner and third-party manager communication
- Practical and field-tested insights
- Actionable takeaways for owners and operators

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2

Session Objectives

- Improve alignment between owners and third-party managers
- Establish clear communication expectations
- Enhance trust, transparency, and accountability
- Identify best practices that improve performance

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3

Setting Expectations From Day One

- Define roles and responsibilities before engagement
- Align on strategy, reporting, and decision authority
- Avoid assumptions that create friction
- Measure success clearly in the first 90 days

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4

Communication Cadence and Reporting

- Establish a consistent communication rhythm
- Focus on KPIs that drive performance
- Balance dashboards with meaningful conversations
- Maintain transparency when performance is off plan

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5

Marketing, Revenue, and Brand Alignment

- Collaborate on pricing and revenue strategy
- Align marketing spend with performance goals
- Clarify visibility into marketing data and decisions
- Resolve disagreements using data-driven insights

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6

Decision Rights and Accountability

- Clarify where authority sits versus collaboration
- Hold parties accountable without micromanagement
- Differentiate strategy issues from execution issues
- Course-correct early when results fall short

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7

Handling Conflict and Course Correction

- Address issues early and directly
- Escalate concerns through agreed channels
- Recognize early warning signs of misalignment
- Use conflict as an opportunity to strengthen partnerships

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8

Key Takeaways

- Clear expectations drive stronger partnerships
- Disciplined communication builds trust
- Data should guide decisions, not opinions
- Strong partnerships consistently outperform weak ones

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9

Closing

- Successful third-party partnerships are intentional
- Communication is the foundation of performance
- Thank you to our panelists and attendees

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10

Questions?



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How to Communicate Effectively with Third-Party Management Companies



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Concurrent Educational Session

AI IN SELF STORAGE: WHAT'S REAL, WHAT'S NEXT?

MATT ENGFER, *CUBBY*

MASON LEVY, *SWIVL*

AUSTIN ROCKMAN, *WHITE LABEL STORAGE*

Concurrent Educational Session

ESTATE PLANNING SWISS ARMY KNIFE: WHY EVERYONE (BUSINESS OWNER/OPERATOR/MANAGER) NEEDS THIS PLANNING TOOL

SEAN TODD

ESTATE MANAGER COUNSELORS, LLC



Estate Planning Swiss Army Knife

- Privacy
- Probate Avoidance
- Creditor Protection
- Continuity
- Avoid disinheritance
children / grandchildren

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1



**Less than 1% of all licensed attorneys
hold this combination of credentials**



SEC Registered Investment Advisor
Manage over \$300 Million in Client Assets

Law Practice

Tax / Estate Planning
Asset Protection

Weekly Radio Show Host – **THE PROFESSIONAL EDGE**

Podcast – **PROFESSIONAL EDGE**

ATLANTA, GEORGIA

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2

Accepted to be True

- No one is getting out of this alive
 - We ALL need and will use an estate plan
- Everyone wants what you have.....for free
- Your plan is better than the governments
- Your legacy ... Provide and protect your family

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3

Estate Planning Mistakes – 101

- Legal Title
- Sole / Joint / TIC / JTWRORS
- Beneficiary Designation
- Supersedes EP documents
- Payable on Death
- Supersedes EP documents
- Adding kid's names to account
- Supersedes EP / Creditor risk

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4

Largest Financial Asset – No Protection

- 401(k) / IRA \$1,000,000
 - Asset controlled by a single beneficiary line
- Error: Spouse is primary beneficiary ; Spousal Rollover
 - Older widowed men are nearly five times more likely to remarry than older widowed women – *Psychologytoday*
- Who is named as new beneficiary – Romeo / Gold Digger
 - Spousal Rollover Kids Disinherited
- Swiss Army Knife – DBT Designed Beneficiary Trust

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5

I LOVE YOU ALL TO SPOUSE

- Save \$; do-it-yourself – Legal Zoom – AI estate plan document
- All to surviving Spouse – NO Asset Protection for kids – disinherited
 - Who controls the estate now ?

As of 2026, the **federal estate and gift tax exemption** is:

- **\$15 million per individual**
- **\$30 million for a married couple** (if portability is properly elected)
- **40% federal estate tax rate** on amounts exceeding the exemption
- **\$19,000 annual gift tax exclusion** per recipient per year
- Swiss Army Knife: Mandatory Fund CST / QTIP Trust

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6

Swiss Army Knife: Mandatory Fund CST / QTIP Trust

- \$15M to CST balance to QTIP
 - Surviving Spouse access
 - Disinheriting ROMEO AND GOLD DIGGER
 - Balance to Kids GUARANTEED
 - Outright Inheritance ... pump the brakes !!

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7

Accepted to be True....

- Largest Potential Creditor: Your Ex-Spouse - Nothing You Can Do
- Asset Protection for the next generation: Your Kids

Approximately 5 out of 10 first marriages end in divorce, compared with roughly 6 out of 10 second marriages."

This is particularly relevant when discussing **gray marriage** and estate planning because remarriages generally have a significantly higher divorce rate than first marriages.

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8

Swiss Army Knife: Testamentary Kids Trust

- No outright bequest to your kids: Put everything in a TT
- Only time under Law
 - Trustee / Beneficiary
 - Full Access
 - Operation of Business / Investments
 - 100% Creditor Protection – even ex-spouse
 - Guarantees Grandchild Inheritance
 - Assign an Investment Advisor
- Age of 70

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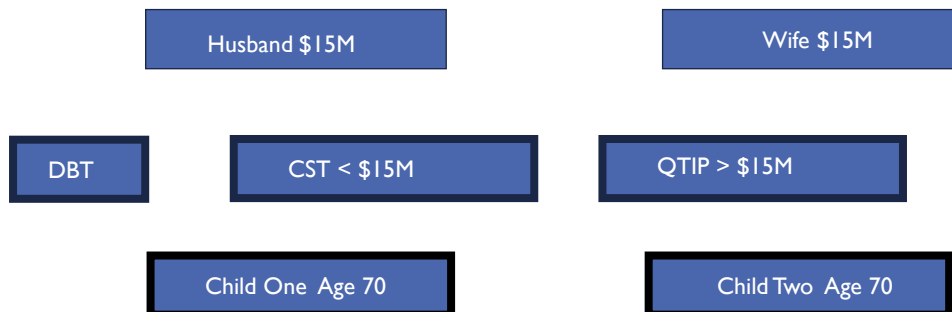
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9

Swiss Army Knife - Utilizing Trusts

Complete Plan



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10

Sean G. Todd Esq., M. Tax, CFP®, CPA

• Key take aways:

- Don't leave a mess....Effectively Plan Your Estate – to protect your lifetime of work, your spouse, kids, grandchildren
- Spend your money Creating Amazing Experiences / Memories

This is your real legacy

MAKE THE MOST OF EACH DAY !!

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Concurrent Educational Session

AIM – HOW TO IMPROVE TEAM EXECUTION

JON DARIO

EDISON PROPERTIES



AIM: How to Improve Team Execution

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1

Whether you are a front-line manager, the head of an organization, or somewhere in between...

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2

Whether you are a front-line manager, the head of an organization, or somewhere in between...

You have an execution problem.

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3

Why does every organization have an execution problem?

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4

Why does every organization have an execution problem?

Because consistent execution is hard.

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5

Two relevant questions:

- What is the magnitude of your execution problem?
- How aware are you of your execution problem?

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6

Even if your team is executing at 90%, you are leaving:

- 10% of your potential sales,
- 10% of your customer satisfaction,
- and 10% of your potential profit

on the table.

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7

The bad news:

There is no cure.

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8

The bad news:

There is no cure.

The good news:

Every incremental improvement helps.

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9

Improvement comes from AIM.

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10

Improvement comes from AIM.

Action
Item
Management

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11

AIM's foundational concept:

Results = External Influences + Actions

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12

AIM's foundational concept:

Results = External Influences + Actions



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13

AIM's foundational concept:

Results = External Influences + Actions



Forget about the desired result.

Focus on the actions.

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14

AIM's critical leadership mindset:

People want to succeed.

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15

AIM's critical leadership mindset:

People want to succeed.

So, our job is to help them succeed!

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16

6 things you can do today to make it easier for your team to execute...

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17

#1 – Create a safe environment.

It must be safe for team members to...

- ask questions
- make mistakes
- fail
- disagree

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18

#2 – Establish a non-negotiable standard of action lists.

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#3 – Build a pyramid of prioritized standards.



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20

#4 – Establish clear routines.

Routines must...

- be documented
- have a repeatable sequence of steps
- answer who, what, where, and when
- establish the common language that will be used
- be trained with all team members
- be simple enough to become habits

JON DARIO

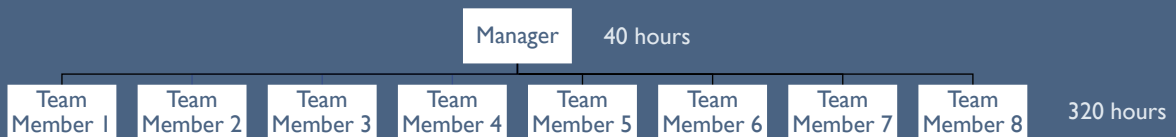
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#5 – Ensure managers prioritize management time.



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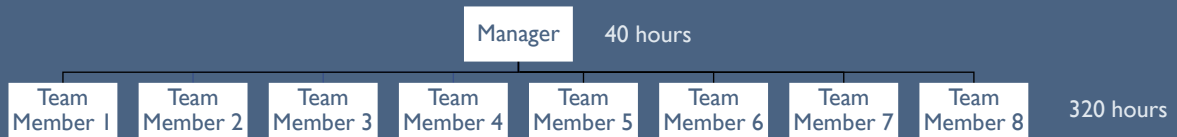
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22

#5 – Ensure managers prioritize management time.



When managers prioritize facilitating team execution above their own tasks, they achieve huge leverage over team results.

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23

#6 – Equip managers with skills to perform the 3 F's.

Focus

Follow up

Feedback

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24

#6 – Equip managers with skills to perform the 3 F's.

Focus

- Center on actions, not results
- No side ventures

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25

#6 – Equip managers with skills to perform the 3 F's.

Follow up

- Be present – Show me, don't tell me
- Assess objectively vs. the standard

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26

#6 – Equip managers with skills to perform the 3 F's.

Feedback

- Praise
- Redirection
- Coaching

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One final caution...

Phantom Execution Disorder (PED)

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PED Diagnostic Tool

Do you receive only or primarily good news from the front-line team?
 Does customer feedback ever conflict with your assessment of the team?
 Do you get frustrated by having too many bad managers who just don't get it?
 Do you hear complaints from the team about there being too many obstacles?
 Does it seem to take longer than it should to get the results you expect?
 Do good managers sometimes surprise you by failing to get stuff done?
 Do you have confidence the team is executing consistently?

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Summary

Execution is never perfect.

AIM is a culture of maniacal focus on action item management.

Once actions are identified, stay focused on them rather than on the result.

Remember that people want to succeed, and it's our job to help them.

Deliver on the 6 things you can do to make it easier for your team to execute
 (safe environment, all-the-time action lists, pyramid of standards, clear routines, prioritize management time, the 3 F's)

Don't become a victim of PED.

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To learn more or dig deeper into AIM ...

Visit me at <https://jondario.com>

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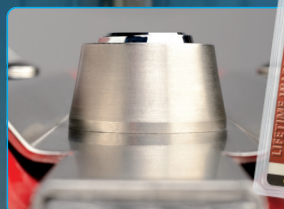
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220

Closed Transactions

\$1.56B

Value of Closed Transactions

\$835M

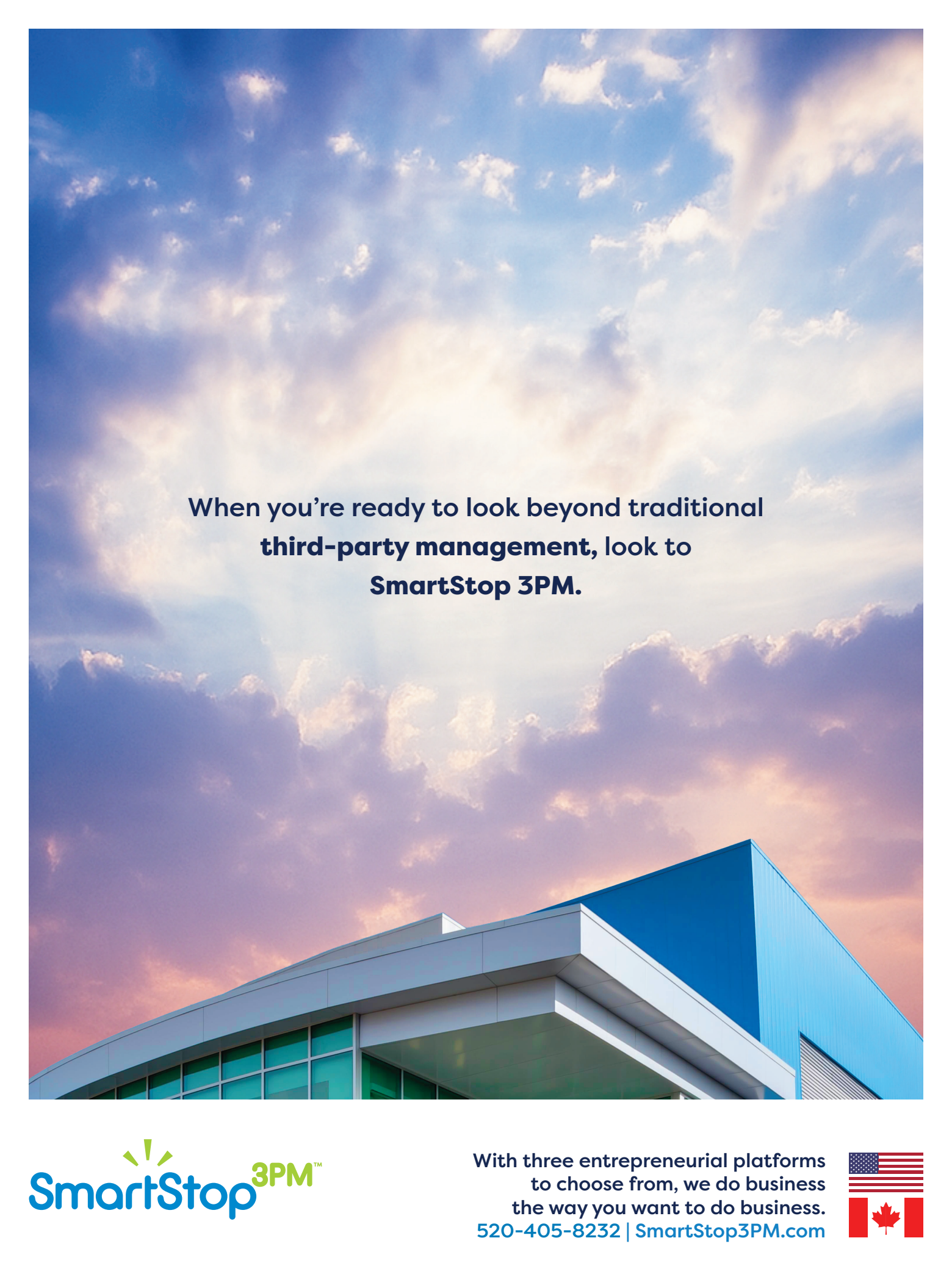
Value of Listings



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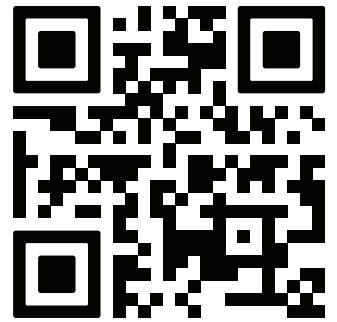
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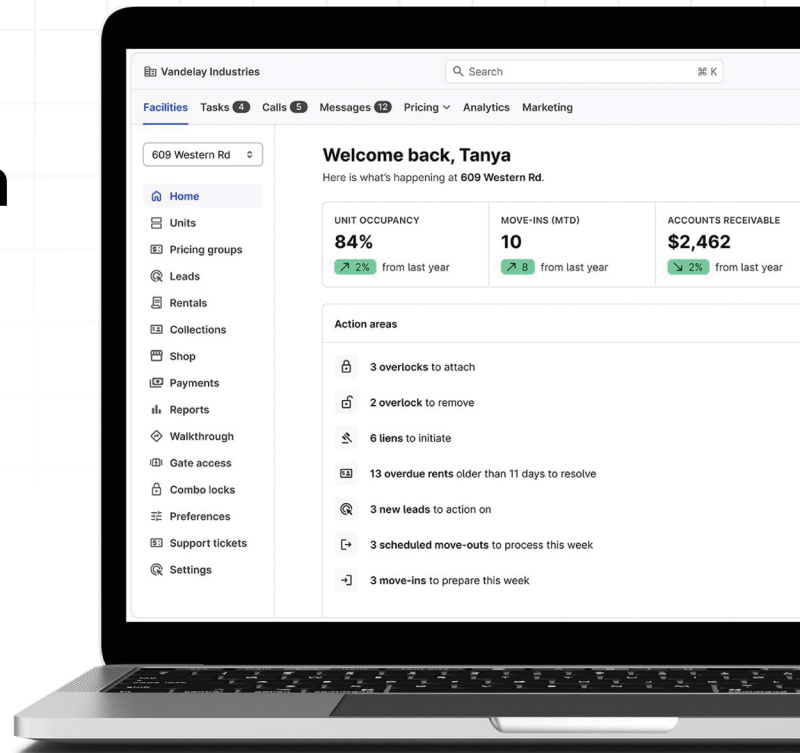
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The screenshot displays the QuikStor dashboard for a user named Sophia Anderson. The interface includes a sidebar with navigation options like Dashboard, Reports, and Corporate Settings. The main area shows a 'Welcome Back' message and a table of tasks. The table has columns for Task Name, Facility, Tenant, Unit, Status, Type, and Date Created. Tasks include 'Overlook on Unit CC-227', 'Auction Prepair', 'Fire Alarm System', 'Remove Locks', 'Replace Broken Light in CC-224', 'Call Tenant', 'Pre-Lien Notices', 'Auction Prepair', 'Clean Unit', and 'Call Tenant'. A summary card on the right shows '180 Vacant Units' and '180 Delinquent Units'. A mobile app interface is also shown at the bottom right.

Task Name	Facility	Tenant	Unit	Status	Type	Date Created
Overlook on Unit CC-227	VS VaultSpace	Ethan Walker	CC-801	Opened	Delinquency	08/06/2024 12:00 AM
Auction Prepair	LV Las Vegas Self-Storage	Olivia Morgan	P-101	Opened	Auction	08/06/2024 12:00 AM
Fire Alarm System	BS Burbank Self-Storage	Jacob Harris	WS-008	Opened	Work Task	08/06/2024 12:00 AM
Remove Locks	NY New York Self-Storage	Ava Mitchell	CC-762	Closed	Delinquency	08/06/2024 12:00 AM
Replace Broken Light in CC-224	FS Las Vegas Self-Storage	Michael Brooks	MB-90	Opened	Damaged Unit	08/06/2024 12:00 AM
Call Tenant	ML Menards LA	Sophia Bennet	L-80	Opened	Delinquency	08/06/2024 12:00 AM
Pre-Lien Notices	TS TS Burbank	Logan Reed	CC-900	Opened	Delinquency	08/06/2024 12:00 AM
Auction Prepair	PL PrimeLock Self-Storage	Chloe Anderson	P-102	Opened	Auction	08/06/2024 12:00 AM
Clean Unit	LA Los Angeles Vault	Samuel Carter	P-202	Opened	Work Task	08/06/2024 12:00 AM
Call Tenant	FS Flexi Space	Isabella Rivera	CC-101	Closed	Delinquency	08/06/2024 12:00 AM

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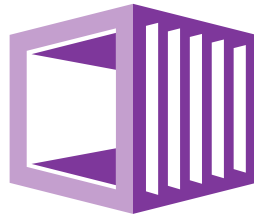
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1. As of 03/31/2026, includes approximately \$15.7B in assets under management across NexPoint and its affiliates, as well as approximately \$17.4B in assets held on the balance sheet of NexBank, an FDIC-insured commercial bank.

2. As of 03/31/2026 inclusive of affiliates and NexBank, based on headcount reports.

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