

EXECUTIVE PARTNER OVERVIEW · B2B OPERATIONS & SYSTEMS SPINE

Your PM software promised to kill the manual work. Loadbear fixes what it left behind.

Loadbear audits, rebuilds, and operates the back office for residential and commercial property-management firms across the Upper Midwest. We pair operator-led execution with proprietary audit and workflow automation inside the PM stack you already pay for. Not a broker, and not another SaaS dashboard for your staff to babysit. Your firm retains 100% data ownership and disbursement release control.

VERIFIED OPERATOR BENCHMARKS · SINGLE UPPER MIDWEST ANCHOR PORTFOLIO

Anonymized · Audited against live GL & executed leases

\$8k-\$14k/mo

Uncaptured Revenue Mapped

Unbilled admin/tech fees, dormant resident-benefit enrollments, utility billbacks (RUBS), and missed lease renewal or modification fees audited across the live GL. Identified, not a projection.

92 → 1

Dynamic Master Lease Spine

Audited 92 fragmented templates, consolidated 10 redundant addendums into a single dynamic master architecture, and remediated page-1 total-monthly-payment disclosures across signed leases.

100% Tie-Out

Monthly 3-Way Trust Recon

Reconstructed 45-month back-office ledgers, established repeatable monthly three-way trust-account reconciliation, and separated operating and fiduciary controls with broker-released disbursements.

13 Streams

SOP Library & Statement QA

Converted tribal back-office habits into written SOP playbooks, automated pre-distribution owner-statement anomaly QA, and deployed structured move-in/move-out deposit evidence archives.

FOUR CORE B2B OPERATIONAL PILLARS

Built on deep AppFolio & property-accounting fluency

01· Forensic Fee-Leakage Audit

DIAGNOSTIC WEDGE

Read-only diagnostic across your live PM software, chart of accounts, owner management agreements, and active leases. Maps where staff redo work by hand and where contractual fees or paid features sit uncollected.

GL & Fee-Leakage Matrix

Unused Feature Audit

RUBS & Ancillary Gap Review

30-Day Recapture Roadmap

02· Trust Recon & Books Close

FINANCIAL SPINE

Stands up repeatable monthly three-way trust-account reconciliation, corporate ledger cleanup, and pre-distribution owner-statement QA. Loadbear prepares reconciliations; your licensed broker and CPA retain all release authority.

3-Way Trust Tie-Out

Owner Statement Anomaly QA

Corporate GL & AP/AR Hygiene

Broker-Gated Disbursement Prep

03· Master Lease & SOP Remediation

DOCUMENT SPINE

Consolidates sprawling template libraries into versionless dynamic masters that pull fields automatically, flags statutory fee-disclosure gaps for broker review, and turns tribal habits into role-specific SOP playbooks.

Versionless Master Templates

Management Agreement Alignment

Role-Specific SOP Playbooks

Structured Inspection Archives

04· Ops Tooling & Property Tech

SYSTEMS & TOOLING

Deploys Loadbear-built workflow automation, leasing and maintenance triage pipelines, secondary client-owned cloud backups, and commercial smart-property hardware standards inside your existing operational workflow.

Automated Audit & Triage Scripts

Client-Owned Cloud Backup

Executive KPI Telemetry

Commercial Smart-Property Specs

THREE-TIER B2B ENGAGEMENT ARCHITECTURE

No hourly billing · No percentage splits of existing management fees · 30-day exit terms

TIER 1 · DIAGNOSTIC WEDGE

Forensic Operations Audit

\$2,500 fixed fee (30-day engagement)

Complete read-only diagnostic across your PM software, lease templates, trust accounting, and uncaptured fee streams.

- ▶ Full read-only audit across GL, leases, owner agreements & software config
- ▶ Uncaptured fee, RUBS & dormant resident-program revenue matrix
- ▶ Template & lease remediation report + 90-minute executive debrief
- ▶ Prioritized 30-day fix-and-automate roadmap + 1 implementation session
- ▶ 100% credited toward Month 1 if upgrading to Managed Retainer in 30 days

TIER 2 · MANAGED OPS

FLAGSHIP RETAINER

Autonomous Back-Office Ops

\$4,000+ /mo base retainer

Done-for-you back-office operations on a flat monthly retainer (base up to 140 doors, with flat +\$400/mo step-ups per 25 doors added).

- ▶ Everything in the Tier 1 Forensic Operations Audit included
- ▶ Monthly corporate books close, AP/AR & 3-way trust reconciliation prep
- ▶ End-to-end AppFolio administration, owner statements & record hygiene
- ▶ Dynamic lease template maintenance, SOP library & shared task cadence
- ▶ Client-owned secondary cloud backup & monthly executive ops reporting

TIER 3 · EMBEDDED ARCHITECTURE

Embedded Growth Partner

Custom retainer + net-new share

For multi-entity operators, 300 to 1,500+ door brokerages, and real-estate teams needing embedded systems architecture.

- ▶ Direct Fractional Systems Architect leadership (Preston Hedlund)
- ▶ Turnkey ancillary program buildout (Admin/Tech, resident benefits, RUBS)
- ▶ Custom Loadbear automation & leasing/maintenance triage tooling license
- ▶ Multi-entity accounting integration & commercial smart-hardware specs
- ▶ Aligned performance share strictly on net-new, Loadbear-created programs

Read-Only Diagnostic First

Initial audits touch zero live records. Every finding cites your ledger and lease files.

Broker Disbursement Control

Loadbear prepares queues. Your Broker of Record approves and releases every payment.

100% Client Data Ownership

Strict tenant isolation. You own your data, SOPs, templates, and cloud backups permanently.

Tooling IP & Clean Exit

No non-compete, 30-day termination for any reason, and 60-day transition license tail.

Preston Hedlund · Founder & Principal Systems Architect

When you hire Loadbear, you work directly with the principal architect. Start with a free 15-minute operations discovery call to review your door count, software stack, and top operational bottleneck.

BOOK A 15-MIN DISCOVERY CALL

calendly.com/preston-hedlund/15min · preston@loadbearops.com