



Understanding Managed Utilities *And Their Impact*

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Overview

- Experienced Utility Experts™ since 2000
- We transform utilities into NOI
- 99% Client Retention
- 3,500 Utility Experts™ and software engineers are exclusively focused on utilities and sustainability
- 7.9M total active service locations
- 2.4M active submetered locations





What is Utility Management?

The **convenience** of money returned for free, from

- Invoice audits
- Sales tax audits
- Rate audits
- Waste audits
- Vacant recovery cost share
- Tenant bill-back

The **control** of easy insights into

- Costs
- Usage
- Rates
- Recovery
- Best bill-back practices
- Sustainability tracking
- Building performance

The **opportunity** to get

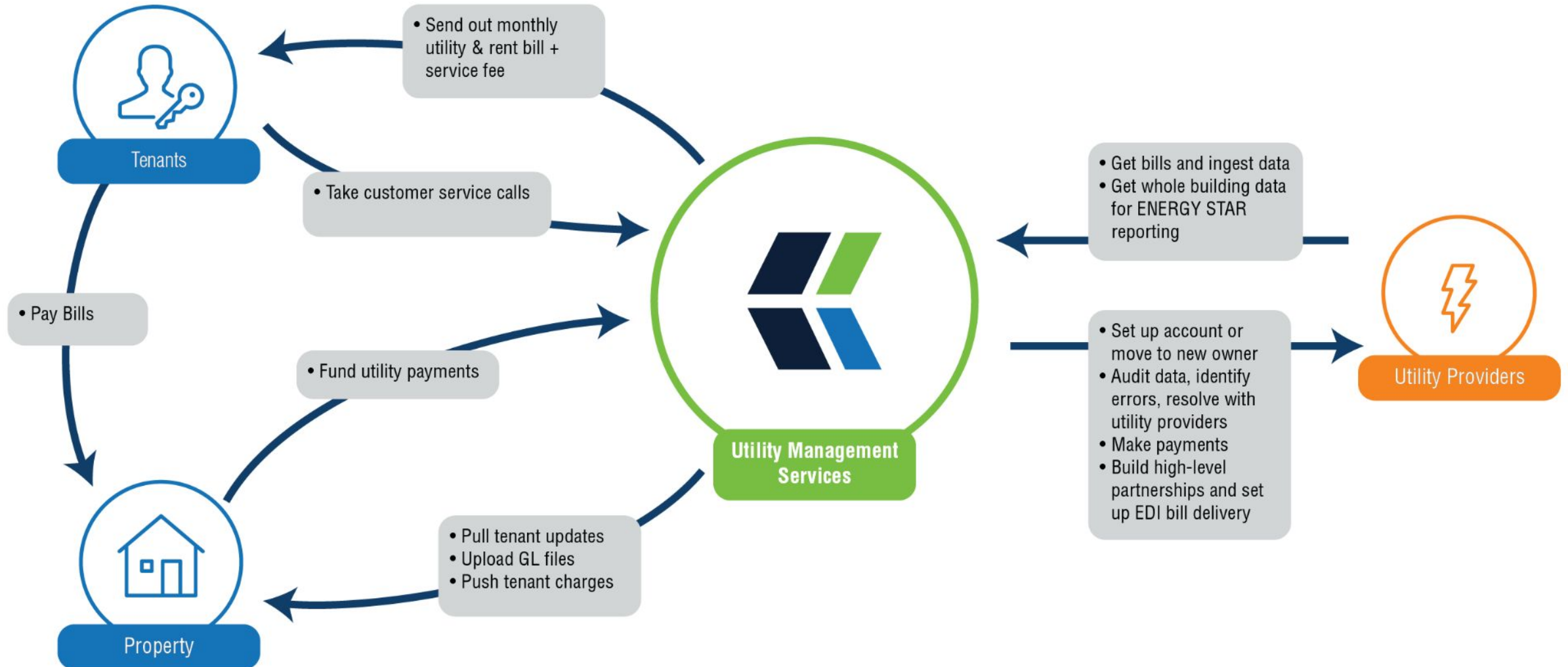
- Lowered rates in deregulated markets
- Legal expertise
- Benchmark comparisons
- Building performance standard expertise
- ALL of our UTILITY EXPERTISE.

The **peace of mind** of

- Knowing The Utility Experts[®] have you covered.
- We're watching out for you.
- We value your partnership.
- Your success is our success.



The Basic Utility Management Workflow





Capabilities

Technology

Responsive, flexible, scalable
Data is accurate, clean, secure
Easy integration

We are partnering with utility vendors to amplify our EDI processing volume and supercharge our processing speeds.

Synergy & Billing

We manage every aspect of your utilities, so your teams can focus on what they do best.

Full Exception Resolution

We keep you informed while resolving 99.999% of issues on your behalf.

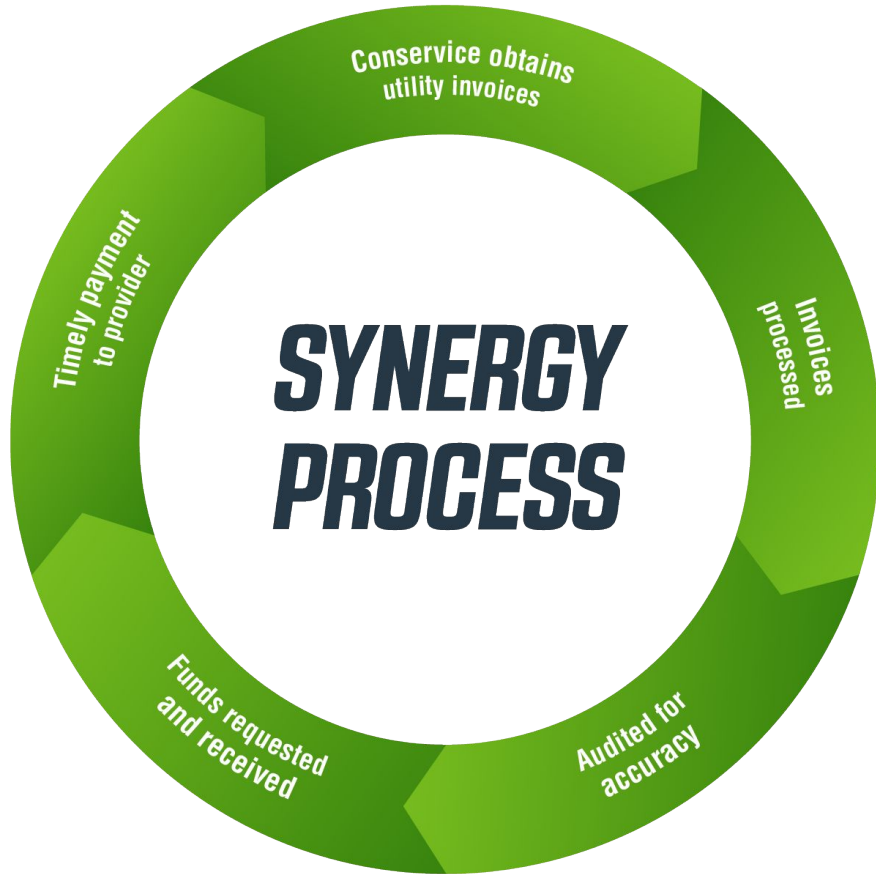
Regulatory Support

Legal Experts prioritize compliance and offer support and legal indemnification.

Customer Service

Your success is our success. Account ownership, product liaisons, and customer service reps serve your team and tenants.

Synergy



Utility Expense Management

Free up your staff and eliminate late fees with Synergy, our expense management service. Our Utility Experts will obtain, process, audit, and pay your provider invoices.

Utility Invoice Exceptions

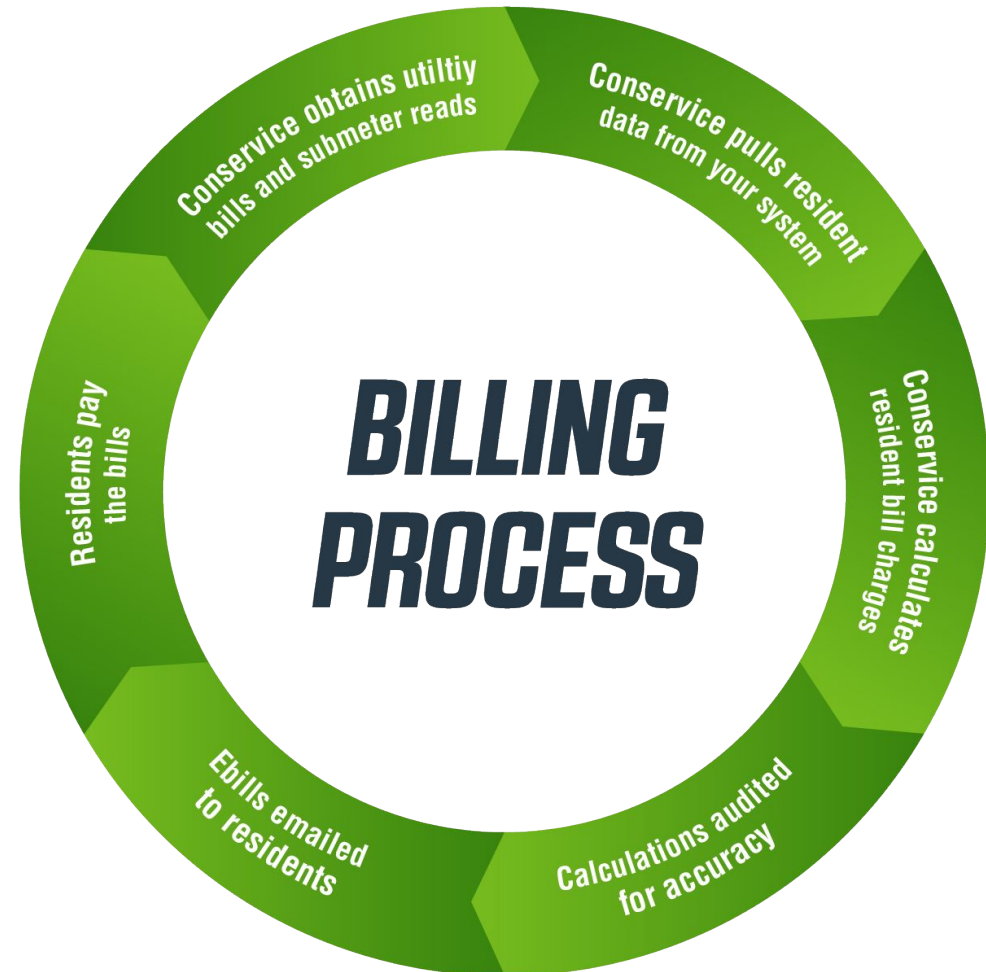
- 20-point bill analysis
- Error identification
- End-to-end provider communication and problem resolution

Saved clients **\$19,070,441** in 2023



Utility Billing

- **Precisely calculated bill-back**
- **One simple ebill** with:
 - Rent, utilities, ancillary charges
 - Customer bill messages
 - Conservation messages
- **Late notice** distribution
- **Autopay** options

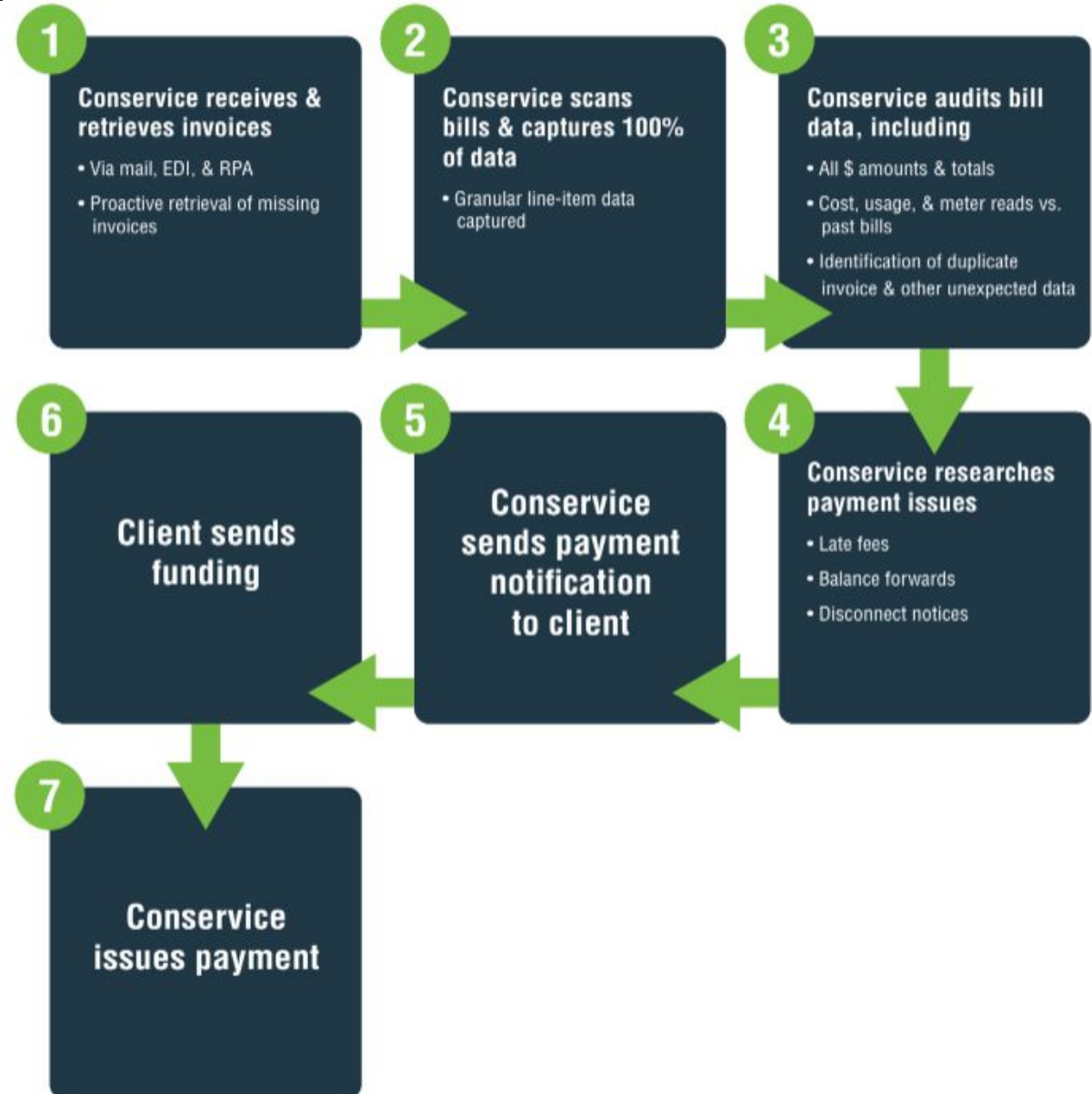


Commercial Solutions

- Utility Bill Pay
- Consumption Reporting
- Cost Tracking
- Contract Management
- ESG Support

Bills we process for clients last year?

5,742,079



Regulatory Support

- 6 full-time attorneys
- Lease reviews
- Extensive knowledge of regulations
- Proactive monitoring of updates and changes to regulations
- Legislative opportunity identification
- Support for multifamily lobbying efforts



Utility Rate Audits

Team of 16 internal rate experts:

- Identify potential savings for your utility accounts
- Analyze your bills
- Study provider rate tariffs and rate schedules

If property is not using the optimal rate, we will seamlessly make the switch with your consent.

Saved our clients **\$18,121,534** in 2023





What our customers say...

"The rate audits that we've seen, I think some of the numbers we were looking at together recently was over the last couple of years, we have maybe about \$300,000 in savings that you guys have identified for our clients. Yeah, that's going directly to their bottom line."

– *Scott Bishop, CPA, Vice President of Finance, FPI*

"I see and we see Conservice as continuing innovators, so you are on top of what's next in the utility industry and the best ways that we can approach the business, so that's huge for us. And having that confidence allows us to be then confident when we present you to ownership groups as a third party management company."

– *Chad Cooley, Managing Director, Strategic Business Solutions, Bozzuto*



QUESTIONS?

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