

## Data vs. Dirt: Two Views of 2025



**Spencer Levy**, Global Head of Research for CBRE (and the most entertaining and over-caffeinated economist in real estate), will face off with **Geordy Johnson**, CEO of The Johnson Group, a multi-generational and multi-property type developer operating coast to coast.

Spencer will download the State of the Real Estate Union from the 50,000-foot level, addressing:

- Are we at the Bottom of the Cycle, with only one direction left to go? Or bouncing along the trough in limbo?
- How much gas does Jay Powell have in his tank?
- Cap rate compression is finally here, right?! (at least GreenStreet says so).
- Lenders are back, but are they bringing their game-face?
- 47 is the new 45. Where do we re-align – if at all - now that Donald Trump returns as President?
- Ouch, why are treasury rates spiking?

Meanwhile, Geordy operates at ground-level, shovel in hand. Developing and operating a national portfolio of multifamily and industrial takes a different set of skills and intuition. His views on:

- Rate cuts – when do tangible results show up in your portfolio / net worth?
- Does geography matter? It seems coastal markets are done with the recession, but is the Southeast slowing down? Were we too healthy for too long?
- Is Florida an environmental and insurance Bridge Too Far?
- Where do you and your lenders not see eye-to-eye?
- What are your investors pushing you to do first?

Join us for a highly entertaining and lively rundown on what's in store for 2025!

We thank our generous sponsors for their ongoing support: **Crown Advisors, Dentons, LightBox EDR, Stewart Title Commercial Services** and **Frazier & Deeter**.

### EVENT REGISTRATION

#### SCHEDULE

Wednesday, November 20, 2024

**4:30 PM** | Registration & Networking

**5:00 PM** | Program Begins

**6:30 PM** | Reception & Networking  
(heavy hors d'oeuvres and open bar)

#### LOCATION

**The Buckhead Club**

3344 Peachtree Rd NE, Ste 2600, Atlanta, GA

**REIAC Members:** Free | **Invited Guests:** \$85  
**Students:** \$25

#### QUESTIONS?

**Alan Agadoni** | 770.329.7685

Best Regards,

**Bill Leffler**

REIAC SE President

**Phil Canzian**

Program Organizer

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