



REAL ESTATE SERVICES

Whitley Penn provides audit, advisory, and tax services to real estate developers and investors nationwide and in select international markets. We offer local pricing, direct access to decision-makers, and a team that understands industry timelines and tax considerations. Our involvement in the National Council of Real Estate Investment Fiduciaries (NCREIF), NAIOP, the Commercial Real Estate Development Association, and Commercial Real Estate Women (CREW) helps us stay current on market trends.

Audit Services

Our professionals routinely perform audits across all segments of the real estate industry, including developers, joint ventures, investment funds, SEC-registered investment advisors, and master-planned communities. We serve clients reporting under U.S. Generally Accepted Accounting Principles (GAAP) and International Financial Reporting Standards (IFRS), encompassing both cost-basis and fair-value accounting.

Outsourced Accounting & Advisory Services

We provide accounting advisory services across the real estate industry, including back-office support, accounts payable processing, Common Area Maintenance (CAM) reconciliations, tenant invoicing, monthly accounting, Enterprise Resource Planning (ERP) implementations, and more.

Tax Services

We understand the complexities of the tax code as it applies to commercial real estate entities and the resulting impacts on investors. Our team has significant experience supporting Real Estate Investment Trust (REIT) clients with assets up to \$1 billion, addressing a wide range of operational issues. From public reporting compliance to tax compliance, we have the capabilities and staffing to keep your REIT competitive. Whether you are acquiring, managing, or selling property, we provide guidance at every stage. We are well versed in 1031 exchanges, Qualified Opportunity Zones, Cost Segregation Studies, and the latest tax law changes. Our knowledge and team depth distinguish us, and we prioritize strong communication and excellent client service.

Your Future is Our Focus

Fund Administration

The Whitley Penn fund administration team has deep experience with real estate funds, including REIT and Non-REIT entities. We understand the complexities of real estate investments in private equity structures and deliver solutions that keep investors informed. Our team prepares fund financial statements, produces investor reporting, and consults on complex calculations such as the distribution waterfall allocation. Outsourcing fund administration allows your team to focus on investment management and value creation.



Deal Advisory & Wealth Management

We advise a wide range of real estate clients on financial growth, asset protection, debt reduction and management, fund diversification, and more. Other services include Cash Flow Management, Strategies, Transaction Planning, Quality of Earnings reports, Qualified Plans strategies to ease tax burdens, and Investment Diversification.

Learn more:



Contact an Advisor to Get Started



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