

WS1448: Developing a Strong Investor Relations Strategy | #Highlights**Episode 1448: Show Notes.**

Our guest, Brian Adams, is the president and founder of Excelsior Capital. He spearheads investor relations in the capital markets arm of the firm. Brian realized that he needed to develop a strong investor relations strategy because investor relations is the vehicle that enables an operator or syndicator to make investments. In this episode, he'll share how he developed strong investor relations in their business that helped him succeed in raising capital.

Today, we also speak to Michael Episcopo of Origin Investments. Michael shares how creating a strong investor relations department helped them scale up their business. They raised a \$100 million fund in just over four and a half months because of their excellent investor relations strategy, aside from effective communication and marketing. Michael also emphasizes being transparent is crucial because it means being open, honest, and authentic to your investor. Listen now and find out why you must take care of your investors well.

Key Points From This Episode:

- Building a strong investor relations strategy is Brian's secret sauce to raising capital.
- Three things investors want: Capital preservation, yield, and tax benefits.
- It's much easier to raise more capital from existing investors than to go out there and form brand-new relationships.
- Investors take a risk on the business owners that's why they must build a strong relationship with their investors.
- Investors don't care where you went to college – tell them how you can solve their problems.
- Brian's biggest mistake in his syndication journey was not focusing on investor relations and communication.
- When scaling as fast as Brian did, ensure you understand the business side.
- The marketing tactics that helped Michael Episcopo scale Origin Investments – building their Investors Relations Department.
- How were Michael and his company able to gain the trust of investors?
- Michael shares their investor relations strategy.
- Michael details how they do investor relations through their website.

Tweetables:

“If you, as the principal and sponsor, are not the chief sales officer, and the chief marketing officer, you will fail.” – Brian Adams

“The secret sauce to raising capital is to actually listen to your logical investor base.” – Brian Adams

“I made a huge amount of mistakes because instead of leading with what I should have been – which is investor relations, business development, and communication – we just focused on doing the deals.” – Brian Adams

“Capital, that’s a commodity; but good people are not.” – Michael Episcopo

“Building trust with investors takes a long, long, long time. You can’t grow it overnight.” – Michael Episcopo

Links Mentioned in Today’s Episode:

[Brian C. Adams on LinkedIn](#)

[Excelsior Capital](#)

[Excelsior Capital on LinkedIn](#)

[Juniper Square](#)

[Michael Episcopo on LinkedIn](#)
[origininvestments.com](#)

About Brian Adams:

Brian Adams is a recovering attorney hailing from a family office background dedicated to providing investors with direct access to institutional alternative investments that can generate passive income in a tax efficient manner. He pulls on his extensive experience in the legal, private equity and real estate industries to provide a broad market view of the entire alternative investment landscape to deliver strategic and reliable investment opportunities to his partners. Brian currently serves as Principal for Excelsior Capital in which he founded in 2019 and oversees acquisitions, operations and capital raising efforts. In addition, he frequently participates in speaking engagements focused on providing the real estate investment community with a real and honest outlook of the commercial real estate market so intelligent investment decisions can be made. He is a former practicing attorney, earning his J.D. from Suffolk University and his B.A. from Wesleyan University with honors.

About Michael Episcopo

Michael is principal of Origin, co-chairs the Investment Committee and oversees investor relations, marketing, and company operations. Michael brings 25 years of investment and risk management experience to the company and believes that calculated risk-taking in inefficient markets is the key to building wealth. He frequently shares his knowledge with individual investors on Origin's blog, Forbes and HuffPost, and his expertise has made him a frequent speaker on real estate investment panels and podcasts.

Michael learned about the physical aspects of real estate in his youth as he helped his grandfather manage his apartment buildings on Chicago's west side. He began college at DePaul University and a year later was introduced to the floors of the Chicago Mercantile Exchange. He continued to work full-time on the trading floor for the next sixteen years while attending night courses to complete his undergraduate degree. After rising from runner to broker, Michael was given an opportunity to become a floor trader by a Chicago-based hedge fund, Tradelink, LLC, and then had a prolific nine-year trading career, twice named one of the top 100 traders in the world by Trader Monthly Magazine.

With two kids and another one on the way, Michael cashed in his chips and retired from trading in late 2005. His new focus was on managing the wealth he accumulated and enrolled in the Real Estate master's program at DePaul.

Michael is the former president of the DePaul Real Estate Alumni Alliance and a sustaining sponsor of the DePaul Real Estate Center. He has been a Vistage member for more than six years and lives in Chicago with his wife and three children. He enjoys traveling with this family, snowboarding, and frequents ski resorts all over North America.

END OF SHOW NOTES

NEWSLETTER

Strengthening Investor Relations for Business Growth

Catchphrase:

More investors, more capital!