Market Research

OVERVIEW | FIRST QUARTER | 2009

MARKET INDICATORS

OFFICE

	1Q 2009	2Q 2009*
VACANCY	↑	↑
NET ABSORPTION	↓	↔
CONSTRUCTION	↔	↓
RENTAL RATE	↓	↓

INDUSTRIAL

	1Q 2009	2Q 2009*
VACANCY	↑	↓
NET ABSORPTION	↓	↓
CONSTRUCTION	↓	↓
RENTAL RATE	↓	↓

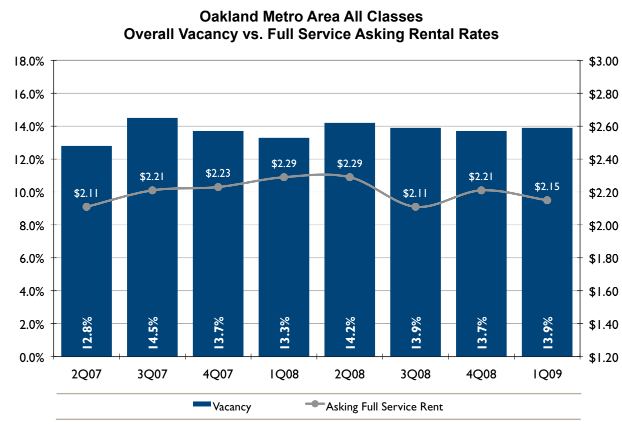
* PROJECTED

East Bay Overview

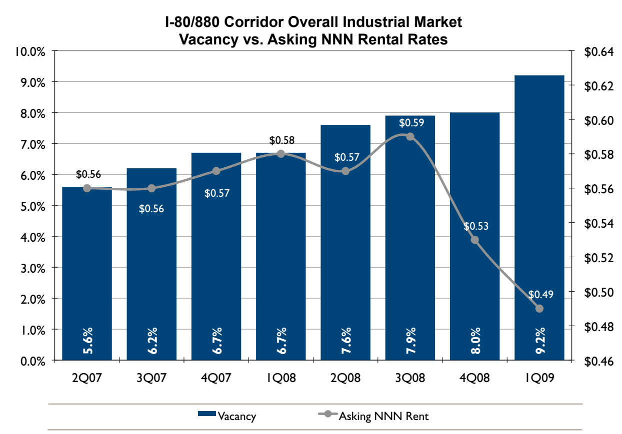
The Oakland Metropolitan Area has continued to feel the pressure of the recession. During the first quarter of 2009, we saw more than sluggish leasing activity as tenant demand continued to tumble. As a result, the office market's average asking rental rates fell from $2.21 at the end of 2008 to $2.19 Full Service per square foot per month (psf/mo) at the end of this quarter. Likewise, the industrial sector experienced a rise in vacancy and a drop in rental rates. Vacancy has increased sharply from the end of last quarter, though it is still slightly lower than the 9.6% national average. Tenants gave back space at a rapid rate. Net absorption for the quarter was negative 1,642,397 square feet as compared with negative 1,668,173 square feet for year-end 2008. However, we expect the Oakland Metropolitan Area to be one of the first Bay Area economies to expand due to its diverse structure. Many of the tenants are located in the area because the area's close proximity to the Port of Oakland, Oakland International Airport, and vast network of interstate highways.

VACANCY VS. RENTAL RATE

OFFICE



INDUSTRIAL



COLLIERS INTERNATIONAL

www.colliersparrish.com

Office Overview

Like every other market in the Bay Area, the Oakland Metropolitan office market continues to feel the pressure of a soft economy. Leasing velocity was about 50% of what it was for the same period a year ago, and absorption for the quarter was negative 47,181 square feet. The overall vacancy rate increased to 13.9% up from 13.6% at the end of 2008. Average asking rental rates dropped 3% during the first quarter, but this is misleading as a general lack of activity makes pegging rents very difficult for both landlords and tenants. Real rental rates might be much lower than $2.15 Full Service rates currently published. Most of the leasing activity in the region has been short term lease extensions with little or no contribution for tenant improvements. It seems as though both sides of the table simply want to get through the next couple of years.

With virtually no credit available to investors and a limited dataset to establish rent trends, the investment market for office buildings has been non-existent for the past several quarters. Surprisingly, EOP did sell its property at 1995 University Avenue in downtown Berkeley to the University of California for $45,000,000 or approximately $340 per square foot. While not unexpected, as the University continues to absorb space around campus, the price was much more than anyone would have anticipated.

We anticipate similar activity levels and rent trends through the next quarter and possibly into the second half of the year.

MARKET ACTIVITY
SIGNIFICANT FIRST QUARTER TRANSACTIONS

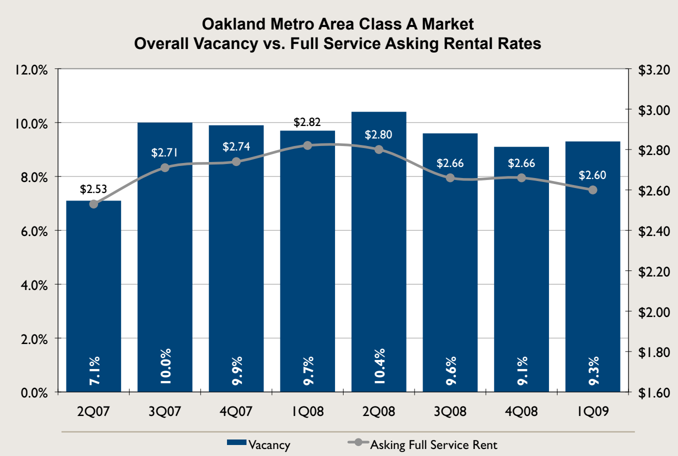
SIGNIFICANT LEASES

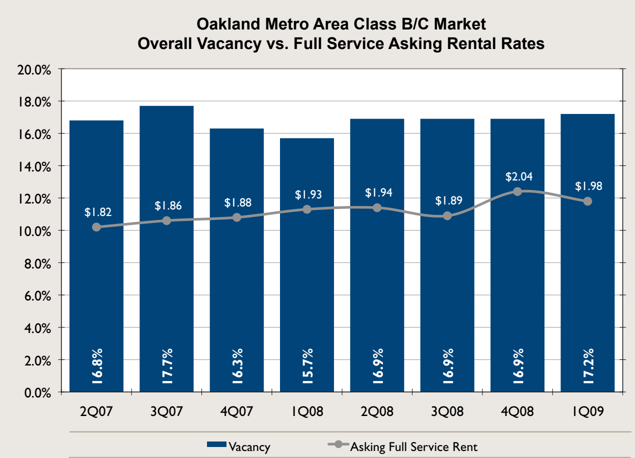
PROPERTY ADDRESS	MONTH/YEAR	SQUARE FEET	TENANT	TYPE
1919 Market Street, Oakland	2/5/2009	17,500	Juniper Ridge	Office
620 3rd Street, Oakland	3/30/2009	5,722	East Bay Express	Office

SIGNIFICANT SALES

PROPERTY ADDRESS	MONTH/YEAR	SQUARE FEET	BUYER / SELLER	TYPE
1995 University Avenue, Berkeley	2/2/2009	134,009	Regents of the University of California	Office
444 Hegenberger Road, Oakland	2/5/2009	70,000	Lighthouse Charter Schools	Office

OFFICE MARKET VACANCY VS. ASKING FULL SERVICE RENTAL RATES
CLASS A, CLASS B&C





OFFICE MARKET STATISTICS
FIRST QUARTER 2009

EXISTING PROPERTIES			DIRECT VACANCY		SUBLEASE VACANCY		TOTAL VACANCY			NET ABSORPTION			CONSTRUCTION		RENT
CLASS	BLDGS	TOTAL INVENTORY SQUARE FEET	SQUARE FEET	RATE	SQUARE FEET	RATE	SQUARE FEET	RATE 1Q-2009	RATE PRIOR QUARTER	OCCUPIED SF 1Q-2009	1Q-2009	YEAR TO DATE	COMPLETED 1Q-2009	UNDER CONSTR.	AVERAGE ASKING FULL SERVICE
SUBMARKETS															
CBD SECTION															
OAKLAND DT															
A	29	9,842,645	642,633	6.5%	74,360	0.8%	716,993	7.3%	6.9%	9,125,652	(35,170)	(35,170)	-	-	$2.79
B/C & Flex	114	5,407,729	893,601	16.5%	39,611	0.7%	933,212	17.3%	15.9%	4,474,517	(74,001)	(74,001)	-	-	$1.93
Total	**143**	**15,250,374**	**1,536,234**	**10.1%**	**113,971**	**0.7%**	**1,650,205**	**10.8%**	**10.1%**	**13,600,169**	**(109,171)**	**(109,171)**	**-**	**-**	**$2.30**
OAKLAND JLS															
A	3	245,600	24,923	10.1%	-	0.0%	24,923	10.1%	28.0%	220,677	43,932	43,932	-	-	$2.27
B/C & Flex	44	1,416,649	203,349	14.4%	5,800	0.4%	209,149	14.8%	19.2%	1,207,500	62,211	62,211	-	172,000	1.72
Total	**47**	**1,662,249**	**228,272**	**13.7%**	**5,800**	**0.3%**	**234,072**	**14.1%**	**12.7%**	**1,207,500**	**106,143**	**106,143**	**-**	**172,000**	**1.72**
CBD TOTAL															
A	29	9,842,645	642,633	6.5%	74,360	0.8%	716,993	7.3%	6.9%	9,125,652	(35,170)	(35,170)	-	-	$2.77
B/C & Flex	158	6,824,378	1,096,950	16.1%	45,411	0.7%	1,142,361	16.7%	16.6%	5,682,017	(11,790)	(11,790)	-	172,000	$1.89
Total	**187**	**16,667,023**	**1,739,583**	**10.4%**	**119,771**	**0.7%**	**1,859,354**	**11.2%**	**12.7%**	**14,807,669**	**(46,960)**	**(46,960)**	**-**	**172,000**	**$2.23**
SUBURBAN SECTION															
RICHMOND															
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	97	3,436,753	340,671	9.9%	-	0.0%	340,671	9.9%	10.3%	3,096,082	12,257	12,257	-	-	$1.91
Total	**97**	**3,436,753**	**340,671**	**9.9%**	**-**	**0.0%**	**340,671**	**9.9%**	**10.3%**	**3,096,082**	**12,257**	**12,257**	**-**	**-**	**$1.91**
BERKELEY DT															
A	9	558,882	59,020	10.6%	1,750	0.3%	60,770	10.9%	16.7%	498,112	32,818	32,818	-	-	$2.78
B/C & Flex	28	974,473	150,685	15.5%	6,234	0.6%	156,919	16.1%	16.7%	817,554	6,290	6,290	-	-	$2.30
Total	**37**	**1,533,355**	**209,705**	**13.7%**	**7,984**	**0.5%**	**217,689**	**14.2%**	**16.7%**	**1,315,666**	**39,108**	**39,108**	**-**	**-**	**$2.43**
BERKELEY WEST															
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	40	1,454,998	183,770	12.6%	4,750	0.3%	188,520	13.0%	12.7%	1,266,478	(4,174)	(4,174)	-	-	$2.37
Total	**40**	**1,454,998**	**183,770**	**12.6%**	**4,750**	**0.3%**	**188,520**	**13.0%**	**12.7%**	**1,266,478**	**(4,174)**	**(4,174)**	**-**	**-**	**$2.37**
EMERYVILLE															
A	14	2,569,348	273,630	10.6%	89,710	3.5%	363,340	14.1%	13.3%	2,206,008	(21,163)	(21,163)	-	-	$2.70
B/C & Flex	44	1,683,088	215,099	12.8%	70,180	4.2%	285,279	16.9%	10.7%	1,397,809	(105,150)	(105,150)	-	-	$1.96
Total	**58**	**4,252,436**	**488,729**	**11.5%**	**159,890**	**3.8%**	**648,619**	**15.3%**	**12.3%**	**3,603,817**	**(126,313)**	**(126,313)**	**-**	**-**	**$2.37**
ALAMEDA - MARINA VILLAGE															
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	55	1,671,320	467,726	28.0%	37,250	2.2%	504,976	30.2%	29.8%	1,166,344	(7,438)	(7,438)	-	-	$1.96
Total	**55**	**1,671,320**	**467,726**	**28.0%**	**37,250**	**2.2%**	**504,976**	**30.2%**	**29.8%**	**1,166,344**	**(7,438)**	**(7,438)**	**-**	**-**	**$1.96**
ALAMEDA - HARBOR BAY															
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	28	1,684,784	274,837	16.3%	52,945	3.1%	327,782	19.5%	17.9%	1,357,002	(25,487)	(25,487)	-	-	$2.10
Total	**28**	**1,684,784**	**274,837**	**16.3%**	**52,945**	**3.1%**	**327,782**	**19.5%**	**17.9%**	**1,357,002**	**(25,487)**	**(25,487)**	**-**	**-**	**$2.10**
OAKLAND AIRPORT															
A	3	453,697	105,877	23.3%	5,320	1.2%	111,197	24.5%	24.3%	342,500	(828)	(828)	-	-	$1.57
B/C & Flex	32	1,389,507	317,238	22.8%	19,428	1.4%	336,666	24.2%	28.0%	1,052,841	52,414	52,414	-	-	$1.54
Total	**35**	**1,843,204**	**423,115**	**23.0%**	**24,748**	**1.3%**	**447,863**	**24.3%**	**27.1%**	**1,395,341**	**51,586**	**51,586**	**-**	**-**	**$1.55**
SUBURBAN TOTAL															
A	26	3,581,927	438,527	12.2%	96,780	2.7%	535,307	14.9%	15.2%	3,046,620	10,827	10,827	-	-	$2.35
B/C & Flex	324	12,294,923	1,950,026	15.9%	190,787	1.6%	2,140,813	17.4%	16.8%	10,154,110	(71,288)	(71,288)	-	-	$2.02
Total	**350**	**15,876,850**	**2,388,553**	**15.0%**	**287,567**	**1.8%**	**2,676,120**	**16.9%**	**16.5%**	**13,200,730**	**(60,461)**	**(60,461)**	**-**	**-**	**$2.09**
MARKET TOTAL															
A	55	13,424,572	1,081,160	8.1%	171,140	1.3%	1,252,300	9.3%	9.1%	12,172,272	(24,343)	(24,343)	-	-	$2.60
B/C & Flex	482	19,119,301	3,046,976	15.9%	236,198	1.2%	3,283,174	17.2%	16.7%	15,836,127	(83,078)	(83,078)	-	172,000	$1.98
Total	**537**	**32,543,873**	**4,128,136**	**12.7%**	**407,338**	**1.3%**	**4,535,474**	**13.9%**	**13.6%**	**28,008,399**	**(107,421)**	**(107,421)**	**-**	**172,000**	**$2.15**
QUARTERLY COMPARISON AND TOTALS															
Q1-09	537	32,543,873	4,128,136	12.7%	407,338	1.3%	4,535,474	13.9%	13.6%	28,008,399	(107,421)	(107,421)	-	172,000	$2.15
Q4-08	537	32,789,473	4,076,194	12.4%	420,714	1.3%	4,496,908	13.7%	13.9%	28,292,565	15,266	55,098	-	772,000	$2.21
Q3-08	537	32,789,473	4,163,226	12.7%	393,275	1.2%	4,556,501	13.9%	14.2%	28,232,972	16,485	(75,318)	-	172,000	$2.11
Q2-08	537	32,789,473	4,114,915	12.5%	550,078	1.7%	4,664,993	14.2%	13.3%	28,124,480	(342,738)	(183,810)	-	172,000	$2.29
Q1-08	537	32,787,994	3,877,480	11.8%	470,132	1.4%	4,347,612	13.3%	13.7%	28,440,382	133,571	133,571	30,000	-	$2.29
Q4-07	535	32,662,338	3,971,073	12.2%	510,110	1.6%	4,481,183	13.7%	14.5%	28,181,155	250,848	162,508	463,700	30,000	$2.23

Industrial Overview

The Oakland Metropolitan industrial market began to feel substantial impact from the nationwide economic recession this first quarter of 2009. The overall vacancy rate crept up to 9.2% from 7.5% at year end 2008 (a 22% increase) attributed chiefly to larger blocks of space being put on the market. For example, Crate & Barrel vacated their 277,000 sq. ft. warehouse/ distribution facility in Hayward. Restoration Hardware vacated their 220,000 sq. ft. warehouse to consolidate operations. The market experienced an overall negative net absorption of 1,642,397 sq. ft. during the first quarter which resulted in a 7.5% drop in asking rents, from $0.53 Triple Net (NNN) psf/mo at the end of 2008 to $0.49 NNN psf/mo. today. Hayward and Union City experienced the largest changes in vacancy rates and asking rents, as warehouse vacancy jumped to 14.1% and asking rents fell to $0.41 NNN psf/mo. We have seen the market shift in favor of tenants as the number of available properties increases and asking rents continue to decline. Tenants have multiple options when considering alternative spaces for lease, and leasing incentives have become the norm. Activity levels remain high, although many companies are looking to renew their existing leases and ride out this economic downturn by minimizing capital expenditures. Exemplary of this, Federated Department Stores signed a three year renewal for 260,000 square feet in Union City this quarter. The infill nature of the Oakland Metropolitan market, lack of development opportunities and it's geographic position relative to the Bay Area's population of 7.2 million people leads us to believe that distribution, service oriented and manufacturing companies will continue to operate along the I-880 corridor. The market will rebound late this year and into 2010.

MARKET ACTIVITY
SIGNIFICANT FIRST QUARTER TRANSACTIONS

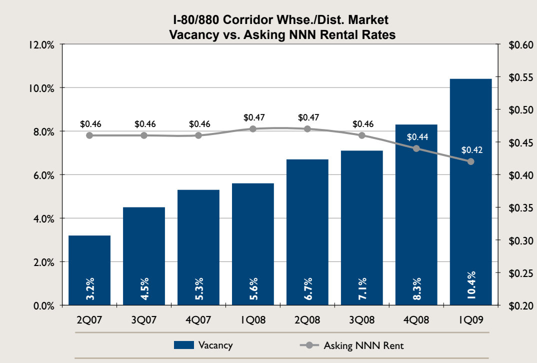
SIGNIFICANT LEASES

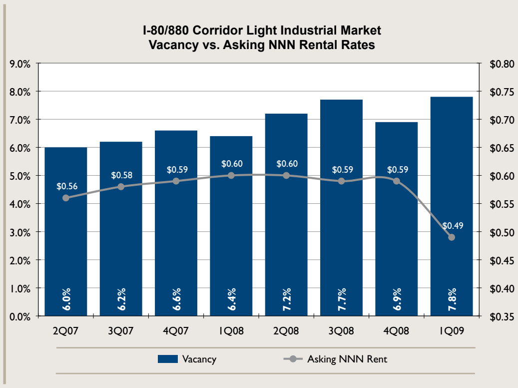
PROPERTY ADDRESS	MONTH/YEAR	SQUARE FEET	TENANT	TYPE
1200 Whipple Rd., Union City	3/15/2009	260,000	Federated Department Stores	Warehouse/Distribution
2984 Alvarado St., San Leandro	1/15/2009	82,000	California Accessories	Warehouse/Distribution
3433-81 Arden Rd., Hayward	1/8/2009	63,000	Pitney Bowes	Warehouse/Distribution
22300 Hathaway Ave., Hayward	1/22/2009	57,858	American Poly-Foam Co., Inc.	Warehouse/Distribution

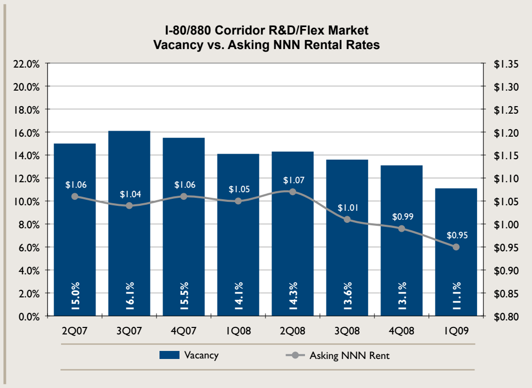
SIGNIFICANT SALES

PROPERTY ADDRESS	MONTH/YEAR	SQUARE FEET	BUYER / SELLER	TYPE
3466 Enterprise Ave., Hayward	3/30/2009	125,343	3466 Enterprise Avenue, LLC	Warehouse/Distribution
26545 Corporate Ave., Hayward	3/5/2009	26,400	Santos Agency, Inc.	Light Industrial

INDUSTRIAL MARKET VACANCY VS. ASKING NNN RENTAL RATES
I-80/880 CORRIDOR WAREHOUSE, LIGHT INDUSTRIAL AND R&D/FLEX







INDUSTRIAL MARKET STATISTICS
FIRST QUARTER 2009

EXISTING PROPERTIES			DIRECT VACANCY		SUBLEASE VACANCY		TOTAL VACANCY			NET ABSORPTION			CONSTRUCTION		RENT
SUB-TYPE	BLDGS	TOTAL INVENTORY SQUARE FEET	SQUARE FEET	RATE	SQUARE FEET	RATE	SQUARE FEET	RATE 1Q-2009	RATE PRIOR QUARTER	OCCUPIED SF 1Q-2009	1Q-2009	YEAR TO DATE	COMPLETED 1Q-2009	UNDER CONSTR.	NNN WTD. AVG. ASKING
SUBMARKETS															
RICHMOND															
Industrial	226	5,094,106	771,096	15.1%	44,850	0.9%	815,946	16.0%	19.3%	4,278,160	167,367	167,367	-	144,386	$0.36
Warehouse	41	4,263,981	166,153	3.9%	-	0.0%	166,153	3.9%	2.3%	4,097,828	(67,030)	(67,030)	-	-	$0.37
R&D/Flex	101	3,436,753	334,669	9.7%	-	0.0%	334,669	9.7%	10.4%	3,102,084	21,257	21,257	-	-	$0.91
Total	**368**	**12,794,840**	**1,271,918**	**9.9%**	**44,850**	**0.4%**	**1,316,768**	**10.3%**	**11.2%**	**11,478,072**	**121,594**	**121,594**	**-**	**144,386**	**$0.52**
OAKLAND															
Industrial	834	22,664,359	942,148	4.2%	56,910	0.3%	999,058	4.4%	4.4%	21,665,301	(10,183)	(10,183)	-	-	$0.49
Warehouse	156	10,616,104	809,895	7.6%	78,535	0.7%	888,430	8.4%	7.9%	9,727,674	(50,104)	(50,104)	-	-	$0.45
R&D/Flex	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
Total	**990**	**33,280,463**	**1,752,043**	**5.3%**	**135,445**	**0.4%**	**1,887,488**	**5.7%**	**5.5%**	**31,392,975**	**(60,287)**	**(60,287)**	**-**	**-**	**$0.48**
SAN LEANDRO															
Industrial	460	11,661,810	1,337,297	11.5%	27,644	0.2%	1,364,941	11.7%	8.9%	10,296,869	(330,741)	(330,741)	-	-	$0.47
Warehouse	127	14,543,408	1,025,285	7.0%	10,000	0.1%	1,035,285	7.1%	8.6%	13,508,123	211,784	211,784	-	25,650	$0.43
R&D/Flex	52	847,380	37,676	4.4%	14,875	1.8%	52,551	6.2%	9.1%	794,829	24,273	24,273	-	-	$0.86
Total	**639**	**27,052,598**	**2,400,258**	**8.9%**	**52,519**	**0.2%**	**2,452,777**	**9.1%**	**8.7%**	**24,599,821**	**(94,684)**	**(94,684)**	**-**	**25,650**	**$0.46**
HAYWARD															
Industrial	784	16,504,507	1,156,396	7.0%	107,836	0.7%	1,264,232	7.7%	5.9%	15,240,275	(286,681)	(286,681)	-	-	$0.52
Warehouse	214	21,078,545	2,077,368	9.9%	898,310	4.3%	2,975,678	14.1%	9.1%	18,102,867	(1,057,259)	(1,057,259)	-	-	$0.41
R&D/Flex	107	4,579,872	566,622	12.4%	51,903	1.1%	618,525	13.5%	15.1%	3,961,347	73,045	73,045	-	-	$0.97
Total	**1,105**	**42,162,924**	**3,800,386**	**9.0%**	**1,058,049**	**2.5%**	**4,858,435**	**11.5%**	**8.5%**	**37,304,489**	**(1,270,895)**	**(1,270,895)**	**-**	**-**	**$0.51**
UNION CITY															
Industrial	162	7,883,678	540,282	6.9%	-	0.0%	540,282	6.9%	4.9%	7,343,396	(151,121)	(151,121)	-	-	$0.49
Warehouse	80	7,187,526	801,949	11.2%	155,106	2.2%	957,055	13.3%	9.6%	6,230,471	(270,506)	(270,506)	-	-	$0.42
R&D/Flex	14	870,672	50,822	5.8%	20,000	2.3%	70,822	8.1%	17.7%	799,850	83,502	83,502	-	-	$0.96
Total	**256**	**15,941,876**	**1,393,053**	**8.7%**	**175,106**	**1.1%**	**1,568,159**	**9.8%**	**7.7%**	**14,373,717**	**(338,125)**	**(338,125)**	**-**	**-**	**$0.48**
MARKET TOTAL															
Industrial	2,466	63,808,460	4,747,219	7.4%	237,240	0.4%	4,984,459	7.8%	6.9%	58,824,001	(611,359)	(611,359)	-	144,386	$0.49
Warehouse	618	57,689,564	4,880,650	8.5%	1,141,951	2.0%	6,022,601	10.4%	8.3%	51,666,963	(1,233,115)	(1,233,115)	-	25,650	$0.42
R&D/Flex	274	9,734,677	989,789	10.2%	86,778	0.9%	1,076,567	11.1%	13.1%	8,658,110	202,077	202,077	-	-	$0.95
Total	**3,358**	**131,232,701**	**10,617,658**	**8.1%**	**1,465,969**	**1.1%**	**12,083,627**	**9.2%**	**8.0%**	**119,149,074**	**(1,642,397)**	**(1,642,397)**	**-**	**170,036**	**$0.49**
QUARTERLY COMPARISON AND TOTALS															
Q1-09	3,358	131,232,701	10,617,658	8.1%	1,465,969	1.1%	12,083,627	9.2%	8.0%	119,149,074	(1,642,397)	(1,642,397)	-	170,036	$0.49
Q4-08	3,358	131,232,701	8,952,063	6.8%	1,489,167	1.1%	10,441,230	8.0%	7.9%	120,791,471	(127,873)	(1,668,173)	-	170,036	$0.53
Q3-08	3,358	131,232,701	8,748,794	6.7%	1,564,563	1.2%	10,313,357	7.9%	7.5%	120,919,344	(376,746)	(2,309,380)	-	170,036	$0.59
Q2-08	3,358	131,232,701	8,842,617	6.7%	1,093,994	0.8%	9,936,611	7.5%	6.7%	121,296,090	(1,194,510)	(1,163,554)	-	144,386	$0.57
Q1-08	3,358	131,232,701	7,637,508	5.8%	1,104,593	0.8%	8,742,101	6.7%	6.7%	122,490,600	30,956	30,956	-	144,386	$0.58
Q4-07	3,358	131,232,701	7,947,671	6.1%	825,386	0.6%	8,773,057	6.7%	6.2%	122,459,644	(555,727)	(1,607,402)	-	144,386	$0.57
Q3-07	3,358	131,232,701	7,440,453	5.7%	713,724	0.5%	8,154,177	6.2%	5.6%	123,078,524	(736,086)	(988,522)	-	-	$0.56
Q2-07	3,349	131,169,548	6,901,855	5.3%	453,083	0.3%	7,354,938	5.6%	5.6%	123,814,610	(70,254)	(252,436)	113,674	-	$0.56
Q1-07	3,349	131,169,548	6,652,764	5.1%	631,920	0.5%	7,284,684	5.6%	5.4%	123,884,864	(182,182)	(182,182)	-	113,674	$0.55

BROKERS & STAFF

MANAGING PARTNER
Kenneth W. Meyersieck
Managing Partner/SVP
(510) 433-5802
kmeyersieck@colliersparrish.com

OFFICE
Elena Cohen
Associate
(510) 433-5816
ecohen@colliersparrish.com

Mike Corbett
Associate
(510) 433-5819
mcorbett@colliersparrish.com

Aileen Dolby
Senior Vice President
(510) 433-5815
adolby@colliersparrish.com

Benjamin F. Harrison
Vice President
(510) 433-5852
bharrison@colliersparrish.com

Trent Holsman
Vice President
(510) 433-5859
tholsman@collierparrish.com

Kenneth W. Meyersieck
Senior Vice President
(510) 433-5802
kmeyersieck@colliersparrish.com

Al Musante
Vice President
(510) 433-5817
amusante@colliersparrish.com

INDUSTRIAL
Chet Barney
Vice President
(510) 433-5826
cbarney@colliersparrish.com

Gabe I. Burke, SIOR
Vice President
(510) 433-5834
gburke@colliersparrish.com

Brennan Carpenter
Associate
(510) 433-5813
bcarpenter@colliersparrish.com

Sam De Sa
Associate
(510) 433-5814
sdesa@colliersparrish.com

Kevin Hatcher
Senior Associate
(510) 433-5818
khatcher@colliersparrish.com

David Henderson
Vice President
(510) 433-5823
dhenderson@colliersparrish.com

Richard P. Keely
Vice President
(510) 433-5806
rkeely@colliersparrish.com

Greig F. Lagomarsino, SIOR
Senior Vice President
(510) 433-5809
glago@colliersparrish.com

Catherine Wong
Assistant to Greig Lagomarsino
(510) 433-5843
cwong@colliersparrish.com

Mark Maguire
Senior Vice President
(510) 433-5835
mmaguire@colliersparrish.com

Casey Ricksen
Senior Vice President
(510) 433-5805
cricksen@colliersparrish.com

Sean Sabarese
Associate
(510) 433-5803
ssabarese@colliersparrish.com

Todd O. Severson, SIOR
Senior Vice President
(510) 433-5810
tseverson@colliersparrish.com

Joe Yamin
Senior Associate
(510) 433-5812
jyamin@colliersparrish.com

INVESTMENT/
PRIVATE CAPITAL GROUP
Kenneth W. Meyersieck
Managing Partner/SVP
(510) 433-5802
kmeyersieck@colliersparrish.com

Kevin Ebrahimi, CCIM
Senior Associate
(510) 433-5820
kebrahimi@colliersparrish.com

Joe Bruzzone
Associate
(510) 433-5807
jbruzzone@colliersparrish.com

RETAIL
Reesa Tansey
Associate
(510) 433-5808
rtansey@colliersparrish.com

Sandra Weck
Senior Vice President
(925) 227-6230
sweck@colliersparrish.com

ADMINISTRATIVE
Catherine Arlin
Operations Manager
(510) 433-5829
carlin@colliersparrish.com

Donna Thibeaux
Administrative Assistant
(510) 433-5825
dthibeaux@colliersparrish.com

Danielle Chappelle
Receptionist
(510) 433-5801
dchappelle@colliersparrish.com

RESEARCH
Molly Herrick
Research Assistant
(510) 433-5836
mherrick@colliersparrish.com

MARKETING
Jason Radburn
Graphic Designer I
(510) 433-5845
jradburn@colliersparrish.com

294 OFFICES IN 61 COUNTRIES
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USA 94
Canada 22
Latin America 17
Asia Pacific 64
EMEA 97

$48.1 billion in annual transaction volume
1.1 billion square feet under management
12,749 Professionals

CONTACT INFORMATION

UNITED STATES

Colliers International
1999 Harrison Street,
Suite 1750
Oakland, CA 94612
Tel: 510-986-6770
Fax: 510-986-6775

Ken Meyersieck
Managing Partner/SVP
Tel: 510-433-5802

Molly Herrick
Research Assistant
Tel: 510-433-5836

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www.colliersparrish.com