

# Cresset Wealth Advisors

## HQ Case Study

### Client Success

Established a new Chicago HQ in Trophy building to establish image and provide amenities

Created a top of market environment with a complete focus on recruitment and retention

*"As our organization grew, we needed to (quickly) find a new HQ. The Gibraltar team did an exceptional job on securing our home that surpassed our expectations."*

### Overview

An executive team from a long-term client of CBIZ Gibraltar was hired to run (as the COO) a startup financial services firm, Cresset Wealth Advisors. Given CBIZ Gibraltar's previously successful working relationship, CBIZ Gibraltar was hired to assist Cresset in finding a high quality new HQ in a Class A (or Trophy) office building for the firm. CBIZ Gibraltar was given the responsibility of:

- Space programming and forecasting the appropriate amount of space
- Assisting in evaluating space standards and type of office environment
- Evaluating various submarkets/locations
- Identifying building options in a very short time frame that would impress Cresset's high end clients and potential employees.
- Securing a lease in the best building possible with most favorable terms

After initially evaluating Class A buildings with spaces that were "plug-an-play" ready with existing conditions and furniture, Cresset Wealth Advisors pivoted their search to focus on Trophy assets and new developments. Utilizing CBIZ Gibraltar's real estate expertise and relationships, the firm secured a space in 444 West Lake Street, a premier, Trophy Class A new development in the Chicago's West Loop Submarket.

CBIZ Gibraltar also assisted in securing temporary space in the Trophy asset for Cresset while the Landlord completed a custom build-out for the firm on one of the top floors in the building. In addition, Gibraltar negotiated termination rights on the space as well as expansion rights to help protect the firm's future growth requirements.

Cresset is now growing the business at an explosive pace, and has already initiated discussions with CBIZ Gibraltar to evaluate offices in other markets in the U.S.

### Client Profile

**Client:**  
Cresset Wealth Advisors

**Address:**  
444 West Lake Street, Chicago, IL  
60606

**Industry:**  
Financial Services

**Square Footage:**  
12,000 SF

**Geographic Footprint:**  
Multi



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