



Greenleaf Property Management

CASE STUDY

Fueling commercial real estate expansion through local partnership.

Greenleaf Property Management is a real estate and asset management firm operating in 9 states. Founded in 2008 with a single-home portfolio, Greenleaf has expanded its footprint to over 4,200 residential units and 1.6 million square feet of commercial space, deploying more than \$750 million in capital to build stronger, vibrant communities.



Industry:
Real Estate



Annual Revenue:
\$50+ Million



Years in Business:
17+



Number of Employees:
60



Financing:
9 Properties

The Challenge:

Greenleaf’s mission centers on delivering quality living and work spaces and building strong communities. With a large and diverse commercial real estate portfolio, Greenleaf expanded into single-tenant net lease properties, a new business line where none of their other banking partners had experience. Greenleaf needed a partner that could manage complex cash flow, ensure reliable payments, safeguard capital growth, and provide fast, flexible financing to support acquisitions, improvements, and the growth of this new division.

The Solution:

- ▶ Strategic and Flexible Financing Decisions from Local Bankers
- ▶ Responsive Banking Team
- ▶ Account and Cash Flow Management



Click to hear their story

“With CSB, we’ve had a long-term, stable relationship and it’s really helped our business be able to operate smoothly[...] having Coastal States Bank as our financial partner means our capital, operations, and growth are all supported by a bank that values the relationship, not just the product they are selling.”

Dave Codrea, Partner

SERVICES PROVIDED

- Commercial Real Estate Lending
- Business Online Banking
- Money Market Account
- Commercial Treasury Management Services

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The Results:

➤ Growth Readiness:

With flexible financing tools and trusted banking support, Greenleaf continues to scale its newest business line, buying single-tenant net lease properties.

➤ Financial Security:

Interest-bearing accounts position Greenleaf for continued growth.

➤ Operational Efficiency:

Simplified transaction processes give Greenleaf more time to focus on going after new opportunities to expand their portfolio.

ABOUT CSB

Coastal States Bank builds relationships by offering a full range of banking and lending services for business owners, leaders and individuals seeking a local banking partner. Whether you’re expanding, improving cash flow or in need of better banking tools and support, connect with a CSB Banker near you to discover how we can help you take your business to the next level with affordable banking solutions, expert guidance and local support.

Discover more at
coastalstatesbank.com





COASTAL STATES BANK

CASE STUDY

Empowering nonprofits to achieve financial efficiency and transparency.



Industry:
Travel & Tourism



Annual Budget:
\$8.5 Million



Years in Business:
60



Number of Employees:
6



Footprint:
Representing 12 States

Travel South USA

Travel South USA is the official regional marketing firm for tourism in the Southeast, **representing 12 states** with a mission **to increase tourism, boost economic development, and showcase the South as a premier travel destination.**

The Challenge:

For Travel South, stakeholder relations is an important component of their organization. From managing relationships with hundreds of contractors to providing transparency and insight to board members, Travel South needed a banking partner that is reliable, responsive and offers efficient banking tools that deliver results. Timely contractor payments are not only vital to operations but also essential to maintaining trust and reputation within their industry.

The Solution:

- ▶ Ensure domestic and international contractors were paid reliably and on time through secure wire transfers and with fraud protection.
- ▶ Simplify processes to save staff valuable time, while gaining clear visibility into cash flow — strengthening efficiency and board transparency.
- ▶ Offer low-cost and interest earning solutions.

Continued ▼

TRAVEL SOUTH USA



Click to hear their story

“The switch to CSB was seamless. They set the tone early on that this was a trusted partnership, letting us know that our finances and contractors are in good hands.”

Liz Bittner, President & CEO

SERVICES PROVIDED

- ▶ Money Market Account
- ▶ Treasury Management Services
- ▶ Positive Pay Fraud Protection
- ▶ Business Online Banking

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The Results:

- ▶ **Time Savings:**
Efficient systems to manage payments and accounts.
- ▶ **Security & Stability:**
Confidence that their funds are safe and working for them.
- ▶ **Growth:**
Moving from a break-even point in 2020 to positive cash flow today, with a **double-digit increase in revenue.**

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