Silver Oaks
ASSET MANAGEMENT

A member of the Silver Oaks Group of Companies

COMPANY PROFILE

2026



Analytics, valuation and CFO support.

For hotel and property owners and businesses in Belize: owner representation, hotel, business and asset appraisals, financial modelling, investment analysis and CFO services.



01 — WHO WE ARE

The analytical backbone for strategic financial decisions.

Silver Oaks Asset Management Ltd. (SOAM) is a member of the Silver Oaks Group of Companies, based in Belize. We provide financial modelling and forecasting, hotel, business and asset appraisals, investment and revenue analysis, cost optimisation and decision-support reporting, together with CFO services and owner representation.

> Our promise is simple: work done to a high standard, every figure checked, people you can reach, and discretion you can count on.

Based in Belize

We understand the local market and the realities of owning and running hotels and property in Belize.

Part of the Silver Oaks Group

Clients can draw on coordinated support across finance, accounting, strategy and people.

Senior-led, sized to you

The level of senior involvement that fits your needs and budget, from one project to ongoing support.

AT A GLANCE

Headquarters
Belize City, Belize

Part of
Silver Oaks Group of Companies

Led by
Mr. Florent Avella

Engagement
Project, fractional or ongoing

Who we serve

Owners of hotels, resorts and residential property, developers and businesses in Belize that need clear analysis, a reliable valuation, an owner-side voice or senior financial leadership.

02 — WHY CLIENTS WORK WITH US

Why clients work with us

What sets our work apart, and why owners and businesses in Belize rely on SOAM for the numbers behind their decisions.

Hotel and real estate know-how

Appraisals, market studies and investment analysis for resorts, hotels, residential and development property.

On the owner's side

Owner representation: management contract compliance, capital expenditure, insurance, cash flow and financing.

Decision-ready analysis

Financial models, forecasts and scenario analysis that help owners and boards optimise costs and plan.

Senior financial leadership

CFO-level support for strategic planning, budgeting, KPI development and stakeholder management.

03 — HOW WE WORK

How we work

1 Listen

We start with your objectives, your assets and the decision you need to make.

2 Plan

We agree the scope, the information needed, the timeline and the fee in a written proposal.

3 Deliver

We build the analysis, test it against the evidence and present clear findings.

4 Follow through

We stay available after delivery and work alongside your team.

Every engagement is scoped to the question and the budget, and you can reach the people doing the work.

04 — OUR SERVICES

What we do

Financial modelling, valuation, investment analysis and CFO-level support for hotels, investors and businesses.

OWNERS
Owner Representation
For hotel and resort owners: asset registers and condition reviews, capex and FF&E planning, agreement compliance, insurance, cash flow and financing.

CFO
CFO Services
Senior financial leadership on a project, fractional or full-time basis: planning, budgeting, KPIs and stakeholder management.

VALUATION
Hotel, Business & Asset Appraisals
Market value appraisals of hotels, resorts, residential and development property, and business and asset valuations.

ANALYSIS
Financial Modelling & Forecasting
Financial models, budgets, forecasts and scenario analysis for operations, projects and investments.

ANALYSIS
Investment & Revenue Analysis
Investment analysis, development cost reports, market assessments, benchmarking and competitive set positioning.

ANALYSIS
Cost Optimisation & Decision Support
Reviews of costs and performance, and reporting designed to support management and board decisions.

FUNDS
Grant & Fund Administration
Administration of grants and funds, including request for proposal packages for endowment financial management and investment.

OUR TEAM



05 — OUR PEOPLE

A team of 6: our Director, four specialists across two departments, and executive support.



Mr. Florent Avella

Founder & Managing Director

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Founder and Managing Director of the Silver Oaks Group, with over eight years leading Silver Oaks. His background includes hospitality and investment-related experience; his focus is financial oversight, governance advisory and strategic project leadership.

HOW OUR TEAM IS ORGANISED

6 in total, including our Director and executive support

Business & Financial Modelling

Business analysis, financial modelling and accounting

3 SPECIALISTS

Legal

Tax matters and contract documentation

1 SPECIALISTS

How we work with you

Every engagement is overseen by Mr. Florent Avella, scoped to the question and the budget, and you can reach the people doing the work.

06 — OUR TRACK RECORD

Our track record

Resort owners, developers and businesses in Belize rely on SOAM for valuations, analysis, asset management and CFO services. Our work is listed by service, with the assignment for each client.

HOTEL, BUSINESS & ASSET APPRAISALS

Itz'ana Resort & Residences
HOSPITALITY & REAL ESTATE
Valuation and appraisal of resort and residential assets

La Isla Resort
HOSPITALITY & REAL ESTATE
Valuation and appraisal of resort assets

The Ambergris Grand
HOSPITALITY & REAL ESTATE
Appraisal report

Ka'ana Resort
HOSPITALITY
Appraisal report and competitive set positioning tool

Margaritaville Beach Villa Resort
HOSPITALITY & REAL ESTATE
Valuation

Omen Development
REAL ESTATE
Market sales value appraisal report, Lot 30, Placencia

INVESTMENT ANALYSIS & MARKET STUDIES

Hidden Valley Wilderness Lodge
HOSPITALITY
Market study and assessment, benchmarking, development cost report, investment analysis, competitive set tool

Margaritaville Beach Villa Resort
HOSPITALITY & REAL ESTATE
Market study

Turneffe Island Resort
HOSPITALITY
Tax and tour package assessment

ASSET MANAGEMENT & OWNER REP.

The Ambergris Grand
HOSPITALITY & REAL ESTATE
Owner representation

Reef Haven, Belize
HOSPITALITY
Asset management, including a Sargassum mitigation plan

Margaritaville Beach Villa Resort
HOSPITALITY & REAL ESTATE
Asset management

CFO SERVICES

Itz'ana Resort & Residences
HOSPITALITY & REAL ESTATE
CFO services (CFO duties)

Ka'ana Resort
HOSPITALITY
CFO services (CFO duties)

ARCH Consulting Group Ltd
CONSULTING
CFO services (CFO duties)

FEASIBILITY STUDIES

Belize Women's Seaweed Farmers Assoc.
ASSOCIATION
Financial lead for the business feasibility study for the Belize seaweed industry, with Bridgepoint Services

SECTORS WE SERVE

Hospitality & resorts · Residential & resort real estate · Property development · Businesses in Belize · Associations

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Start with a conversation

Tell us about your property, your business or the decision ahead, and we will suggest the right analysis or support. Fees are confirmed in a written proposal.

Mr. Florent Avella
Founder & Managing Director

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www.silveroaksasset.com · Belize

THE SILVER OAKS GROUP OF COMPANIES

Silver Oaks ASSET MANAGEMENT
Silver Oaks MANAGEMENT SERVICES
BRIDGEPOINT SERVICES LIMITED
Silver Oaks INSTITUTE

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Analytics, valuation and CFO support for owners and businesses in Belize.

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