

# Jeffery Potter

REAL ESTATE, CONSTRUCTION, AND  
FINANCE EXPERT WITNESS



## EXPERT WITNESS FOR REAL ESTATE

With over 40 years of hands-on experience in the real estate development industry, Jeff has built a diverse portfolio, contributing as a builder, developer, general contractor, and sponsor/operator throughout the Western U.S. His extensive expertise spans all stages of a project—from planning and entitlements to finance, construction, property management, and operations.

As an expert witness, Jeff is highly regarded for his ability to provide valuable insights and guidance in state court, arbitration, and mediation. His track record in these areas reflects his ability to effectively communicate complex concepts in a straightforward, compelling manner. Jeff often focuses on achieving early settlements, helping parties resolve disputes efficiently and cost-effectively.

Over his career, Jeff has developed more than 4 million square feet of commercial real estate, covering a broad range of property types including industrial, multifamily, retail, self-storage, residential, and land development projects. His in-depth knowledge of real estate finance, partnership structures, and property management has solidified his reputation as a trusted advisor and expert in the field.

Holding a Master of Real Estate Development (MRED) and a Bachelor of Science from USC, Jeff is also a licensed general contractor and real estate broker with over 40 years of experience. His prior role as a licensed securities broker-dealer further enhances his comprehensive understanding of both the real estate and finance sectors.

With a strong foundation built on real-world experience and long-term industry relationships, Jeff's professionalism, expertise, and clear communication make him an invaluable asset both in the courtroom and in the development field.

## AREAS OF EXPERTISE

Jeff's specialized knowledge is valuable for addressing legal and consulting matters related to:

- Real Estate Development and Entitlements
- Ownership, Title, and Easement Issues
- Construction and Defects
- Lender / Borrower / Bank Issues
- Lease and Investment Analysis
- Tenant / Landlord Contract Disputes
- Limited and General Partner Issues
- Accredited and Non-accredited Investor Issues
- Developer, Lender, and Investor Deal Structures
- Conflicts of Interest, Brokers, and Investors
- Real Estate Brokerage - E&O
- Financing Structure - Debt & Equity
- Testifying in State Court, Arbitration and Mediation
- Architecture and Engineering Defects
- Partnership Disputes
- Property Management
- Contract Disputes
- Commercial and Residential Planning & Zoning Issues and Disputes
- Home Owners Association Governance Dispute

and more

## ABOUT JEFF POTTER

Jeff is the founder of H&M Investment Advisors, Inc., bringing over 40 years of diverse experience in the real estate development industry. Raised in a 157-year-old farming family in Bakersfield, California, Jeff learned the values of hard work and family heritage, which continue to shape his approach to business and life.

After earning his degree from the University of Southern California (USC), Jeff began his career with one of the largest engineering contractors in the U.S., Superior Gunite, where he became the protégé of the company owner. Under this mentorship, Jeff was introduced to the world of real estate development and construction, laying the foundation for his future endeavors.

Throughout his career, Jeff has developed over 4 million square feet of commercial real estate, including industrial spaces, multifamily apartments, retail centers, self-storage facilities, residential properties, and land developments. Notable projects in his portfolio include a Super Walmart, a 332,000-square-foot industrial building, and over 300 multifamily units.

Beyond his professional success, Jeff is deeply committed to mentoring the next generation of leaders. He actively shares his knowledge and experience to "add value" to others' lives, supporting causes such as disabled and active veterans, inner-city sports, youth development, and socially impactful projects. His contributions extend to teaching and guest lecturing at prestigious institutions, including USC, UCLA, UC Irvine, and Cal State Pomona.

Jeff's personal passions also reflect his adventurous spirit. An avid mountain biker, he competed in the world-renowned Adidas Trans Alp Challenge across Europe, enduring one of the most challenging races globally. His competitive nature extends to his hobbies, including fly fishing, paddleboarding, horseback riding, and golf, all while maintaining an active lifestyle through regular fitness routines.

With his broad range of expertise and commitment to both professional excellence and community service, Jeff epitomizes the values of entrepreneurship, mentorship, and social responsibility. His work as an expert witness, alongside his dedication to improving the lives of others, further solidifies his reputation as a trusted and multifaceted professional.

## SAMPLE CASES

### Tenant Property Dispute

- **Case:** Determining whether the tenant was on or off the landlord's property when the altercation occurred.
- **Key Points:**
  - Tenant involved in a fist fight after leaving their apartment.
  - Landlord sued, but the critical question is whether the tenant was on or off the landlord's property.

### Real Estate Broker and Construction Defects

- **Case:** Evaluating the allocation of responsibility and potential sources for settling a case involving a broker's representation, property sale, and construction defects.
- **Key Points:**
  - Developer purchases a high-value home with broker representing both the buyer and seller.
  - Subsequent sale for a higher price with the same broker's dual representation.
  - Buyer claims construction defects and requests a repurchase.

### Breach of Contract and Investment Distributions

- **Case:** Addressing a plaintiff's claims of breach of contract and failure to receive their share of distributions in a real estate investment partnership for custom home construction.
- **Key Points:**
  - Limited partner invests over \$1M in a partnership for custom home construction.
  - General Partner takes excessive development fees and makes amendments to the construction loan.
  - Plaintiff sues for breach of contract and non-receipt of investment distributions.