FISHMAN RESEARCH TECHNOLOGY AND ANALYSIS

Case Study: A Limited-Partner Research Portal

One centralized home for a partnership's documents, research, and conversation

Role: research contractor and developer · Client: limited partners of a residential partnership (Client A) · Platform: Cloudflare Pages, Workers, and D1 · Timeframe: a recent two-month build

SAMPLE PORTFOLIO DELIVERABLE. Names, places, amounts, dates, and other identifying details have been changed or generalized. This is not a document from a real client matter. It is not legal advice.

Overview

FRTA designed and built a custom research portal for the limited partners of a residential rental partnership. The property is a mid-rise, rent-regulated apartment building in a California city. A professional manager runs day-to-day operations, and a general partner controls the partnership. Jason Fishman of Fishman Research Technology and Analysis acted as an independent research contractor and vendor, not as a partner and not as an attorney.

The portal combines a simple sign-in, a shared message board, and question-and-answer search over the partnership's records with the underlying financial and governance research, all in one place. A live demonstration, with sample rather than real partner data, can be shown separately. The live client site is not linked here.

The challenge

Information about the partnership had often traveled informally, from one family member to another. Several recurring problems made it difficult for limited partners to stay informed:

- Lost in translation. Information passed from one family member to another tended to lose detail along the way.
- Scattered records. Partnership documents lived across individual email threads and personal files, with no single reference copy.
- No shared forum. Many partners had never spoken to one another, which made it hard to compare notes or form a common view.

The partners needed one centralized, transparent location where everyone could see the same information at the same time.

The solution

FRTA delivered a purpose-built web portal designed to be approachable for partners of every level of technical comfort. Key capabilities include:

- Simple, remembered sign-in. Partners register and sign in with a name and a PIN, and the portal can remember the device for later visits.
- Live presence. A who's-logged-in view shows which partners are active.
- Messages and announcements. Partners can receive updates, and an administrator can send a note to everyone or to one person. Drafts are not sent until they are released.
- Polls and voting, including custom polls and a way to record partner approvals.
- A document library with search and a read-aloud control, so partners can listen to a document as well as read it.
- Ask a question. Partners type a question and are pointed to source documents in a growing research corpus. Answers are for orientation; partners are asked to verify before acting.
- Public-records sections drawn from the city's open data: permits, inspections, 311-style service requests, police and fire or building-department items, and rental inventory, with a daily monitoring log.
- Videos, with an administrator able to show or hide each film and change the order.

- A partner directory (only what a partner chooses to share), a current-holder list that an administrator can edit, and an activity log of visits.
- Themes and optional seasonal decorations, plus administrator control over built-in site text, section visibility, and branding.
- A private admin console for users, polls, media, messages, backups, and login records. Push-notification prompts can be offered once per device.
- A short how-to film and a written guide on adding the portal to a phone's home screen.

Design

The visual language is quiet and formal: deep navy and charcoal surfaces, gold rules and accents, a serif display face with a clean sans-serif for interface text, and a simple mark. Large, high-contrast tiles keep every destination readable on both desktop and phone.

The research behind the portal

The portal is more than a document locker. It is the delivery vehicle for research FRTA assembled on the partnership's finances and governance. Exact figures that could identify the matter have been generalized.

- Financial analysis. Operating statements were used to document annual rental revenue in the low millions, near-full occupancy, and a percentage-based management fee plus additional charges, so partners had a clear baseline for questions.
- Governance review. The research identified a mid-2010s restatement of the limited partnership agreement. It found no record of a consent package having been circulated, and partners reportedly signed the restatement without being provided the prior agreements or a summary of changes. These are research findings, not legal conclusions.
- Books-and-records requests. FRTA drafted a books-and-records demand under the California Revised Uniform Limited Partnership Act, which addresses limited partners' rights to information. Short profiles of prospective law firms were posted so partners could seek independent legal advice. Firm names are omitted from this sample.

Partner alignment

The portal became a point of connection among partner families. Several limited partners began using it as a shared reference. Individual names, ownership percentages, private payment accounts, and family details are omitted from this sample. One family member's account of a missed distribution, later addressed only after a lawyer's letter, is the kind of report the portal can collect; it was not independently established in the work as reviewed.

Outcomes

- Centralized communication. Partners have one place to read, ask, and discuss, instead of relaying details through family chains.
- Transparency. Financial figures and governance findings are presented alongside the supporting documents.
- Shared access. Every partner works from the same information at the same time.
- Momentum. With partners aligning and attorney options available for review, the group had a practical path toward a counsel-reviewed records request. Nothing in the underlying matter was sent until counsel review and partner approval.

Designed and built by Jason Fishman, Fishman Research Technology and Analysis, as a research contractor to the limited partners. Figures in this sample have been generalized. Not legal advice.