

**Newport Beach Balboa Peninsula (Orange County)**  
**Refinance Mixed Use Income Property**  
 2<sup>nd</sup> Trust Deed Investment



**CapitalBenefit**  
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**Executive Summary**



Property Type	<b>Mixed Use</b>
Occupancy	<b>Non-Owner</b>
Purpose	<b>Business</b>
Loan Amount	<b>\$250,000</b>
Appraised Value	<b>\$4,560,000</b>
Combined Loan-to-Value	<b>37%</b> *
Protective Equity	<b>\$2,877,000</b> *
Investor Yield	<b>12.00%</b>
Term	<b>3 Years</b> (40 due in 3)

\* 1<sup>st</sup> mortgage \$1,433,000 at 3.50%

**Fund directly into insuring Title Company**  
**Your vesting on Note and Deed of Trust**

**Comments:** *Appraisal dated October 6, 2023*

Our borrower has owned this property for 19 years. She has very good credit and will use the proceeds to make another real estate investments.

The current tenants are paying \$16,000/month.

Per Appraiser: This property offers a ground level office/retail space (998 sq. ft.) and an upper level residential unit (2,170 sq. ft.) and a 2-car garage on a 3,389 sq. ft. lot.

**Options:** *Available as a multi-beneficiary (partial interest portions)*

Examples of investor returns —

\$50,000	partial interest – scheduled monthly income	\$504
\$100,000	partial interest – scheduled monthly income	\$1,009
\$250,000	whole note – scheduled monthly income	\$2,521

**Loan Servicing:** Capital Benefit offers comprehensive loan servicing

**Summary Information only** – call Marcel Bruetsch at (949) 566-9040 for more information or a complete investor diligence package.

For additional Trust Deed Investments, visit [capitalbenefit.com](http://capitalbenefit.com)

Available to California investors or all qualified investors.



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