

Newport Beach, CA (Orange)  
Refinance Oceanfront Rental Duplex  
1<sup>st</sup> Trust Deed Investment



**CapitalBenefit**  
the greener money™

Executive Summary



Property Type	Duplex
Occupancy	Non-Owner
Purpose	Business
Loan Amount	\$1,375,000
Appraised Value	\$2,500,000
Loan-to-Value	55%
Protective Equity	\$1,125,000
Investor Yield	9.00%
Term	3 Years (40 due in 3)

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

**Comments:** Appraisal dated February 25, 2017

Our borrower has owned this property for 40 years together with a partner. Currently, there is just a small mortgage against the duplex. He will use the loan proceeds to buy out the partner and complete the remodel.

Once updated, he believes to generate total rents of \$7,500/month.

The property is located on the Balboa Peninsula, just 2 miles down the boulevard from our office.

Per Appraiser:

Unit A: 3 bedrooms, 3 baths, 1,600 sq. ft. living space

Unit B: 1 bedroom, 1 bath, 710 sq. ft. living space

The lot size is 2,614 sq. ft.



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

Examples of investor returns —

\$100,000	partial interest – scheduled monthly income	\$771
\$500,000	partial interest – scheduled monthly income	\$3,857
\$1,335,000	whole note – scheduled monthly income	\$10,606

**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.



**CapitalBenefit**  
the greener money™

Capital Benefit, Inc. 2727 Newport Blvd. #203 Newport Beach, CA 92663  
(949) 566-9040 | (949) 566-9262 | [capitalbenefit.com](http://capitalbenefit.com)  
CalBRE Real Estate Broker License # 01876453 NMLS ID 254002