

**Montebello (Los Angeles County)**

**Refinance Duplex**

**2<sup>nd</sup> Trust Deed Investment**



**CapitalBenefit**  
the greener money™

## Executive Summary



Property Type	<b>Duplex</b>
Occupancy	<b>Non-Owner / Owner</b>
Purpose	<b>Business</b>
Loan Amount	<b>\$200,000</b>
Appraised Value	<b>\$775,000</b>
Loan-to-Value	<b>62%</b> *
Protective Equity	<b>\$295,000</b> *
Investor Yield	<b>11%</b>
Term	<b>3 Years (40 due in 3)</b>

\* 1<sup>st</sup> mortgage \$280,000 at 3.75%

**Comments:** *Appraisal dated December 15, 2018*

Our borrower has owned this property for 15 years. She has good credit and stable employment. The net loan proceeds will be used to buy an income property.

Per Appraiser:

Unit A: 3 bedrooms, 2 bath, 1,792 sq. ft., occupied by owner  
Unit B: 2 bedrooms, 1 bath, 701 sq. ft., rented at \$1,800/month  
Lot size: 6,342 sq. ft., 3-car detached garage.

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

Examples of investor returns —

\$50,000	partial interest – scheduled monthly income	\$464
\$100,000	partial interest – scheduled monthly income	\$928
\$200,000	whole note – scheduled monthly income	\$1,857

**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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Capital Benefit, Inc. 2727 Newport Blvd. #203 Newport Beach, CA 92663  
(949) 566-9040 | (949) 566-9262 | [capitalbenefit.com](http://capitalbenefit.com)  
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