

**Dana Point (Orange County)**  
**Refinance Rental Property**  
2<sup>nd</sup> Trust Deed Investment



**CapitalBenefit**  
the greener money™

**Executive Summary**



Property Type	<b>Single Family</b>
Occupancy	<b>Non-Owner</b>
Purpose	<b>Business</b>
Loan Amount	<b>\$275,000</b>
Appraised Value	<b>\$1,260,000</b>
Combined Loan-to-Value	<b>65%</b> *
Protective Equity	<b>\$439,000</b> *
Investor Yield	<b>11.00%</b>
Term	<b>3 Years</b> (40 due in 3)

\* 1<sup>st</sup> mortgage \$546,000 at 6.875%

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

**Comments:** *Appraisal dated May 5, 2021*

Our borrower has owned this home since 2004.  
He has very good credit and stable employment.  
The loan proceeds will be used to make the balloon payment  
on the current 2<sup>nd</sup> mortgage.

The tenant is paying \$5,500/month.

Per Appraiser: This property offers 2,189 sq. ft. of living space featuring  
3 bedrooms, 2 ½ baths, pool and a 2-car garage on a 7,366 sq. ft. lot.

**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
\$275,000	whole note – scheduled monthly income	\$2,553

**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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