

**Santa Ana (Orange County)**

**Refinance Residence for Business Purpose**

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



**CapitalBenefit**  
the greener money™

## Executive Summary



Property Type	<b>Single Family</b>
Occupancy	<b>Owner</b>
Purpose	<b>Business</b>
Loan Amount	<b>\$603,000</b>
Appraised Value	<b>\$3,050,000</b>
Combined Loan-to-Value	<b>30%</b> *
Protective Equity	<b>\$2,150,000</b> *
Investor Yield	<b>10.00%</b>
Term	<b>3 Years</b> (40 due in 3)

\* 1<sup>st</sup> mortgage \$297,000 at 4.25%

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

**Comments:** *Appraisal dated November 16, 2022*

Our borrower inherited this property 3 years ago.  
He has perfect credit and is a local realtor.  
The loan proceeds will be used for real estate investments.

Per Appraiser: This property offers 4,306 sq. ft. of living space featuring 5 bedrooms, 4 ½ baths, pool and a 3-car garage on a 32,347 sq. ft. lot.

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

Examples of investor returns —

\$50,000	partial interest – scheduled monthly income	\$425
\$100,000	partial interest – scheduled monthly income	\$849
\$603,000	whole note – scheduled monthly income	\$5,120

**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](https://capitalbenefit.com)**

Available to California investors or all qualified investors.



**CapitalBenefit**  
the greener money™

Capital Benefit, Inc. 4667 MacArthur Blvd #230 Newport Beach, CA 92660  
(949) 566-9040 | (949) 617-5242 | [capitalbenefit.com](https://capitalbenefit.com)  
CA DRE Real Estate Broker License # 01876453 NMLS ID 254002