

PORTFOLIO RIGHT-SIZING

DOLLAR GENERAL®



Overview

A long time client strategized and “right-sized” his commercial real estate portfolio and we helped guide and implement the process for him in 2012.

We located an asset with a 15-Year lease term and minimal landlord responsibilities and then assisted in the disposition of two properties with NN leases and shorter lease terms. Both of which resulted in redeploying our client’s capital, stabilizing his portfolio, and continuing to deliver a strong return on investment.

Below is a brief summary of the steps we followed throughout the process:

- 1) *Implement TIC Liquidation Plan*
- 2) *Identify a new NNN Dollar General property for redeployment of TIC capital*
- 3) *Analyze Tax impact on the TIC disposition*
- 4) *Secure Financing & Close on new NNN Investment Property*
- 5) *Successfully close on the TIC disposition*
- 6) *Successfully dispose of two older Dollar General – Double Net properties*
- 7) *Pay off acquisition loan on new investment property*

We are happy to discuss and help you strategize “right-sizing” your retail investment portfolio to better reflect your current or long term investment needs.

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