

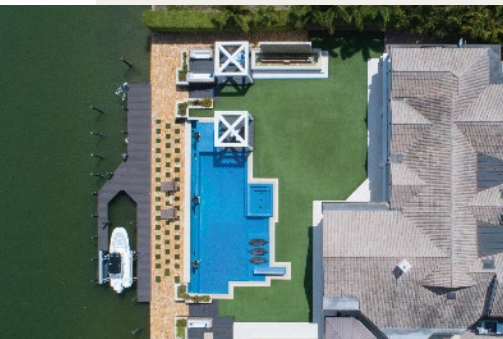


THE INTERSECTION OF REAL ESTATE,  
TAX PLANNING, & WEALTH MANAGEMENT

## It is our passion to empower people to be secure, free, and generous.

At JRW Realty, we enable our clients to earn strong returns and maximize their tax benefits through strategic real estate investing. We have helped thousands of real estate investors with a client-centered, concierge approach to listing and selling investment property, navigating 1031 exchange requirements, and providing comprehensive due diligence and acquisitions of passive, income-producing real estate.





## It All Revolves Around You



We are client-centered and take a long-term relationship-based approach in every aspect of our business. We source the investment property that is best suited for our clients' tax and wealth management needs. Our clear, honest pricing helps you successfully exit your current investment property and reinvest your capital effectively in order to improve your financial position. We value clients over commissions, trust over transaction volume, and long-term relationships over short-term profits.

## Personal Service Throughout the Life of Your Investment



We view ourselves as advisors first, and not as transactional brokers. Our highest priority is to come alongside you to help you realize your personal investing goals, from start to finish.



Many clients approach us with investment properties that require active management while only generating cash flows in the 0–3% range. We help these clients transition into passive investments that yield cash flows starting at 6–7% annualized.













# The Resources of a Market Leader

## Extensive Access to On- and Off-Market Properties



We work with an extensive network of real estate developers, Fortune 500 tenants, owners, and brokers to source the best properties on- and off-market for clients seeking net-leased or apartment investments.

## Proprietary Access to Diversified Portfolio Offerings

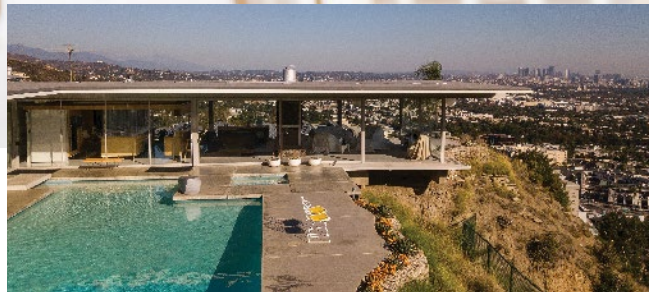


Our close industry connections give us proprietary access to diversified portfolios of long-term net-leased and multifamily real estate. Interests in these portfolios qualify for use in 1031 exchanges, allowing our clients to exchange investment property for portfolio shares while protecting their capital from capital gains taxes.

## In-Depth Due Diligence and Underwriting



We perform extensive due diligence on every property we evaluate, only recommending investments that meet or exceed our rigorous due diligence standards. Every week our team reviews over 100 properties, choosing to acquire only the best 3–4% for our clients.



# Expertise You Can Rely On

## Tax and Wealth Management Expertise



Our principals have over 60 years of experience in real estate, finance, tax structuring, and wealth management. JRW Realty provides access to tax, finance, and wealth planning experts as an integrated part of the real estate acquisition process, making us the ideal concierge broker for investors seeking to successfully defer taxes and grow their wealth.

## A Focus on Macroeconomics



Our distinguished research and analysis of macroeconomic trends is key to the successful protection and growth of our clients' wealth. We pay careful attention to the macroeconomic conditions and demographic trends that impact markets and investments in order to better inform every recommendation that we make.

## Over \$2.0 Billion in Closed Transactions



We have overseen \$2.0 billion in closed transactions across the nation. Since 2016, we have successfully assisted with over 500 tax-deferred exchanges, closed over 500 assets, and are currently acquiring net-leased and multifamily properties on behalf of our clients in excess of \$700 million dollars per year.









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