





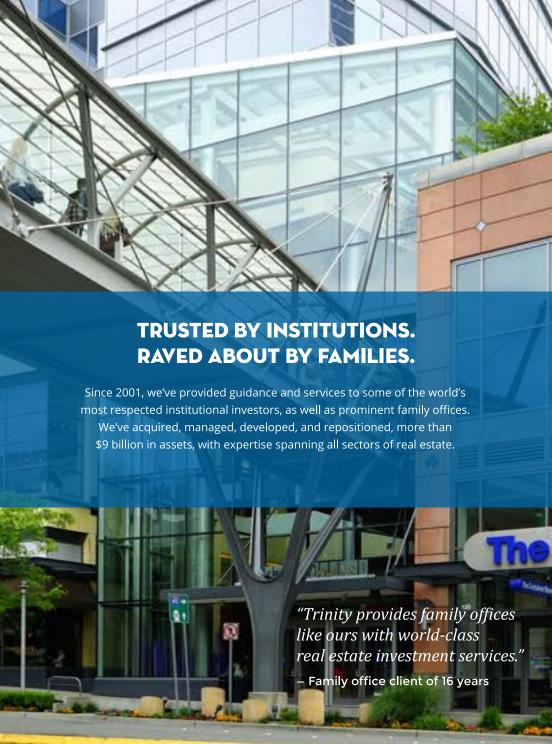
# WE UNDERSTAND MARKET DYNAMICS. AND FAMILY DYNAMICS.

Investing on behalf of families is unlike any other business. It requires equal measures of discipline and flexibility, and advisors who understand how the personal sometimes shapes the professional. Whatever your family's vision, we can deliver solutions for creating, enhancing, and preserving wealth through real estate.

### **SERVICES:**

- ▲ Goal-setting
- ▲ Investment strategy & implementation
- Succession planning
- ▲ Portfolio evaluation
- ▲ Development evaluation
- Asset management

- ▲ Acquisition & disposition
- ▲ Property repositioning, renovation, & development
- ▲ Family education & mentoring
- ▲ Best practices implementation
- ▲ Performance benchmarking





#### A TRINITY SUCCESS STORY:

Navigating the sale of a high-value asset

A parking garage in the heart of downtown Seattle had been in the Costacos family since the 1940s. Decades later, as the city boomed, several firms approached the family with offers to lease or buy the property.

The Costacoses wanted to be wise about their response. Was it better to lease? To sell? At what terms? And what happens afterward? A casual lunch aimed at answering some of those questions soon turned into an ongoing relationship.

We guided the family through the fast-paced, often dizzying world of high-value real estate. In addition to counseling them during the sale of their property, we helped complete a complex IRS "1031" exchange, arranged cost-effective financing for their new properties, and, above all, made sure they understood the risks and opportunities in each investment.

Says family member John Costacos, "We understood the deals we made and felt good about them. We also appreciated how Trinity handled our complex family dynamics. Overall, I can't imagine anyone doing a better job."



#### A TRINITY SUCCESS STORY:

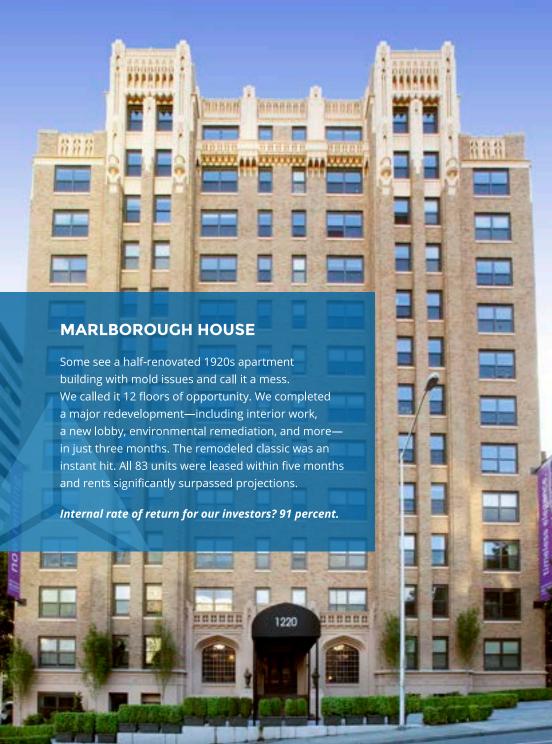
Building wealth for the next generation

Our client already had a successful record of investing. But to help reach an ambitious goal of building wealth for the next generation, they wanted to enhance their portfolio with more real estate.

Knowing they needed the same high level of expertise that guided their other investments, the family met with several real estate consultants. National firms were too big and impersonal; even some local firms were too "corporate." And none offered all the services and expertise the family was looking for. That's where we came in.

We first helped family members achieve consensus on their goals. Then we provided the structure for bringing that vision to life. We strengthened day-to-day portfolio management by implementing key systems, processes and analytics. And we continue to mentor members of the family so they can make future decisions with confidence.

In all, we're providing our client with exactly what they were looking for: best-in-class real estate counsel with a personal touch.







# SMART. EXPERIENCED. REFRESHINGLY HUMAN.

At Trinity Real Estate, you'll work with our agile and responsive team of cycle-tested senior executives who are remarkably knowledgeable, yet personal in their approach. Discover why decisions about major investments don't require major infrastructure—or major attitude.

### Create, Enhance, Preserve.

You have goals for your wealth. We have solutions for achieving them.

## **GET IN TOUCH.**

- ▲ info@trinityre.com
- ▲ 206.957.9600
- ▲ 3720 Carillon Point Kirkland, WA 98033

