



A CASE STUDY

A VETERAN INVESTOR MAKES US A PARTNER.

A Seattle venture capitalist bet he could get national-level real estate expertise in his own back yard. Three thriving acquisitions later, we've proven him right.

BACKGROUND

The Seattle-area founder of one of Seattle's most successful venture and private equity investment firms wanted to allocate a significant portion of his family office's investment portfolio to real estate.

After consultations with several large national wealth management firms, he decided they did not provide the hands-on real estate expertise and control that he was looking for. So, he tried someone that he had worked with in the past: Trinity Real Estate. Together, we began exploring his goals, return targets, and risk thresholds.

APPROACH

Our client was initially interested in long-term holds in a custom portfolio designed for his family office—investments that required little management. After considering the available opportunities, as well as our demonstrated ability to manage risk while creating higher returns, our client decided to pursue investments with more value lift.

We acquired three assets, including two apartment projects and an industrial asset, all in strong long-term locations where we were able to add significant value for the family through hands-on repositioning.

We also provided education and mentorship for a family member who eventually took over the day-to-day management, a goal the family had from the beginning.

OUTCOME

The properties have resulted in significant value increases as well as a significant source of cash flow to support the family office. After several years of managing the portfolio in-house, the family rehired us with the aim to continue to add value as well as continue mentoring.

"I was looking for a firm that could teach us," our client says. "Trinity has really become the ultimate partner."

SERVICES PROVIDED

Strategic Advisory | Project Development | Portfolio & Asset Management
Transaction Services | Investment Strategy | Value Optimization Consulting
Portfolio Performance Review | Development Management