

A CASE STUDY

BUILDING LONG-TERM WEALTH THROUGH REAL ESTATE INVESTING

BACKGROUND

A young couple with five children, had recently experienced a wealth creation event and wanted to invest in real estate. However, they had no prior experience in real estate investing and needed guidance on how to build a portfolio that aligned with their financial goals. They prioritized stable cash flow, asset preservation, and a low-risk approach, while also preferring Eastside locations due to their familiarity with the area and trust in its long-term growth.

With no clear starting point, the family turned to Trinity Real Estate to help them understand the market, evaluate investment options, and create a strategy that fits their needs.

APPROACH

EDUCATION & STRATEGY DEVELOPMENT

We began by providing the family with a comprehensive education on different property types, investment structures, and market dynamics. Through in-depth discussions and financial modeling, we helped them understand the risk profiles of various asset classes, the role of leverage, and the potential long-term appreciation.

SERVICES PERFORMED

Strategic Advisory | Portfolio & Asset Management | Investment Strategy
Family Education & Mentorship | Asset Management | Leasing Oversight
Benchmarking | Reporting

Ultimately, we developed a Core+ multifamily investment strategy balance between stable cash flow and value-add opportunities that allowed for flexibility in both market cycles and future financial goals.

OFF-MARKET ACQUISITION EXECUTION

With a strategy in place, we sourced and secured a 38-unit multifamily property in Redmond, WA—a perfect match for their goals. This off-market deal provided strong rental demand, larger unit layouts, and long-term upside-down potential.

Given their inexperience, the family leaned on our expertise to handle the entire acquisition process, from underwriting to negotiations. We conducted due diligence upfront, allowing them to move swiftly and confidently. Our strong broker relationships helped us secure favorable terms without a competitive bidding process.

OFF-MARKET ACQUISITION EXECUTION

Beyond the transaction, we guided the family through ownership best practices, property management strategies, and financial planning.

We structured the investment to align with their debt-averse philosophy, helped establish new banking relationships, and implemented a renovation strategy that balanced financial returns with tenant well-being.

OUTCOME

CONFIDENCE & KNOWLEDGE GAINED

The family went from real estate novices to confident investors with a clear long-term strategy.

A SOLID FIRST INVESTMENT

The off-market acquisition provided stable cash flow and value-add potential while maintaining low risk exposure.

A BLUEPRINT FOR GROWTH

With their first investment successfully underway, the family is well-positioned to continue building their portfolio with our ongoing guidance.

By taking a holistic, education-first approach, Trinity Real Estate helped transform an inexperienced family into strategic, well-informed real estate investors—setting the foundation for long-term wealth creation and financial security.