

Investment Real Estate Services

773.348.8080



➤ Investment Brokerage

➤ Property Management

➤ Tax Deferral Strategies

Since 1983 Root Realty has operated as a boutique investment real estate services firm providing specialized service and senior level attention through each phase of the project or sales transaction. We represent clients who are looking for a trusted advisor, ranging from individual investors and partnerships to trusts and financial institutions.

Our Values:

Service-It is our mission to provide unparalleled service and dedication to each of our clients, no matter how big or small.

Integrity- We value our clients and take pride in being a trusted advisor by demonstrating ethical practice and honest opinions across everything we do.

Communication- Our objective is to listen and understand our clients objectives, and communicate the results of our activities on a regular basis.

Creativity- We will constantly seek the best possible methods of creating value for our clients by challenging the status quo, fostering innovation and embracing change.

Since 1983 the real estate brokerage industry has evolved and we have used our creativity to find innovative ways to service our clients and use technology to their advantage. Root Realty was founded on the old standard of service and we have adapted without compromise.

Investment Brokerage

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We have analyzed and executed commercial and investment transactions including acquisition/disposition mandates, land contracts, re-development projects, commercial leasing, and feasibility consultation.

Disposition Services

- **Positioning-** By listening to our clients and understanding local markets, we work to maximize a properties' value by creating a unique and intriguing investment thesis and marketing strategy.
- **Delivery-** In order to maximize our clients opportunities we prepare a professional marketing package with valuable data that buyers and their representatives will use to demonstrate and evaluate the property.
- **Proactive Response Marketing-** Over the past 25 years we built a valuable and proprietary network by tracking all Chicago brokers and buyers, including investors, developers, land buyers, and operators. We submit applicable offerings to these clients and follow up to ensure exposure of our listings.

Investment Advisory Services

- **Experience-** With more than 25 years in the real estate business, Root Realty knows how to identify and value properties for maximum performance.
- **Quality-** Our disciplined approach to due diligence has produced market-beating returns for our clients.
- **Value-** Root Realty is focused on one thing: providing a high-value investment experience. Our constant conversation with property owners gives us an informational advantage on market trends.
- **Ease-of-Ownership-** By engaging Root Realty's property management services, investors can rely on us for peace of mind and passive ownership.

Multi-Family • Mixed Use • Development Sites



1710 W. BELMONT AVENUE • CHICAGO IL 60657 • PHONE: (773) 348-8080 • FAX: (773) 348-0219
www.rootrealty.com

Property Management

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Benefits of Root Realty Management Services

- Passive Ownership
- Improved Cash Flow
- Controlled Turnover
- Tenant/Vendor Relations

Tenant Relations

- Keep the property rented to individuals or parties of desirable character and standing based on thorough application process.
- Prepare and obtain duly executed leases at the prices and upon the terms and conditions specified or agreed to by Owner

Collection and Reporting

- Collect rent monthly according to the terms of the lease.
- Owner shall receive monthly reports by mail, including: repairs incurred, account balance, and income/expense statement including a rental proceeds check

Maintenance Services

- Receive complaints to the office call center from tenants. Call will then be directed appropriately, and designated manager will take such corrective actions deemed necessary up to a pre-determined expenditure limit per action. Any expenditure above this limit shall require approval by owner
- 24-Hour-A-Day response to emergencies. Root Realty, Inc. has a number tenants receive and can call with emergencies after business hours

Contractor Work

- Root Realty, Inc. can negotiate bids for contractor work and oversee process

Specializing in all types of rental property from three flats and multi-family mid-rises to mixed use property and commercial space.

Tax Deferral Strategies

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Strategies that can allow an investor to:

- Realize and utilize built in appreciation of real estate holdings
- Defer long term capital gains
- Eliminate management responsibility
- Invest in institutional quality real estate assets
- Manage retirement income

A 1031 Exchange allows clients to defer capital gains and other taxes on the sale of business or investment property. In order to qualify for safe harbor treatment, investors must replace the property sold within certain strict timeframes. As experts in 1031 Exchanges, Root Realty makes it easy for clients to sell property and use the proceeds to purchase additional properties, while deferring capital gains and other taxes. Root Realty has access to an inventory of quality properties available for identification or purchase as replacement properties.

Tenant-in-Common (TIC) ownership is an alternative for real estate investors seeking replacement property for their IRC Section 1031 tax deferred exchanges. Under this co-ownership structure, an investor owns an undivided, fractional interest in an entire property and share in his or her portion of the net income, tax shelters and growth.

I invite you to contact us to learn how these various options might help you achieve your investment goals.

Securities offered through Welton Street Investments LLC, member FINRA/SIPC, 4600 S. Syracuse Street, Suite 530, Denver, CO 80237, 888.569.1031. This is neither an offer to sell nor a solicitation of an offer to buy a security. Such an offer may only be made by means of a private placement memorandum. As with any real estate investment, there are various risks including, but not limited to: loss of principal, variations in occupancy which may negatively impact cash flow, limited liquidity, and limits on management control of the property.

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