



GARRETT SHOLER

Federal Opportunity Zones, Self Storage, Industrial, Retail, Investment & Development Brokerage
Principal / Senior Vice President

PROFILE

Garrett Sholer is a Principal and Senior Vice President with Lee & Associates, North San Diego County. With 25 years of experience in commercial real estate investments and development, his primary focus is facilitating the acquisition and disposition of federal Opportunity Zone properties and self-storage facilities/development sites. Within federal Opportunity Zones, Garrett's primary focus is sites which are economically viable for ground-up development or redevelopment. This most frequently includes a multi-residential (apartment), or industrial component and often includes assisted/senior living and/or a low-income housing component.

CAREER SUMMARY

Over his 25 years in commercial real estate, Garrett has been involved in hundreds of transactions including most commercial product types (industrial, self-storage, retail, multi-residential, assisted living and hotel sites). Prior to joining Lee & Associates, he practiced at Grubb & Ellis (now Newmark Knight Frank) where he completed development projects and landlord/tenant assignments in addition to investment property sales. Garrett started his commercial real estate investment career at Marcus & Millichap in 1993, where he brokered the sale of dozens of multi-tenant commercial investment properties throughout Southern California.

From 2004 through 2013, Garrett further expanded his experience by managing a commercial real estate investment and development company. This experience provided unique insight into the challenges of developing, repositioning, managing and owning commercial real estate.

Within the past decade Garrett also gained valuable insight into other forms of analysis and investments by working as a third-party investment manager. Formerly licensed as a securities broker and financial advisor (FINRA Series 7 and 66 licenses), this experience included building and rebalancing client portfolios containing publicly-traded securities (stocks, REIT's, Exchange Traded Funds, Commodity Funds, Exchange Traded Notes and Master Limited Partnerships). Managing other people's investments has helped Garrett gain a more complete understanding of the interplay and assessment of risk inherent in a wide range of investment vehicles. Constantly expanding his understanding of the world of investments has always been a top priority for Garrett. Today these experiences assist him in advising his clients as markets and the economy continue to change.

As a constant student of his trade, Garrett continuously seeks to expand the depth and breadth of his knowledge in order to go above and beyond in the service of his clients.

EXPERIENCE

- 2014 to present: Principal/Senior Vice President - Lee & Associates, Inc.
- 2004 to 2013 : Managing Partner - Diversified Associates, LLC
- 2000 to 2003 : Associate Vice President - Grubb & Ellis Company
- 1993 to 1999 : Senior Associate - Marcus & Millichap

EDUCATION

- Bachelor of Business Administration (Specialty: Finance, Real Estate, and Law), California Polytechnic University - Pomona, CA
- Concentrations (Graduate Studies)
- Real Estate Investment Analysis

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PARTIAL CLIENT LIST

- > Entertainment Properties Trust ("EPR")
- > Westport Properties
- > Fowler Acquisition Partners
- > Essex Property Corporation
- > Foothill Thrift Loan
- > J.E. Robert Companies
- > GE Capital Corporation
- > Bank of America
- > City National Bank
- > The FDIC