

# The Avalon Private Equity Group

## Self-Directed Private Equity Fund

Real Estate Investor Concierge Services

Income & Capital Gains Tax Mitigation



## Identify - Harness - Harvest

**We didn't develop this program to make Thousands of Dollars**

**We developed it to make Millions**

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# AVALON

PrivateEquity Group



## SELF-DIRECTED PRIVATE EQUITY FUND MEMO: 2025

**Private Equity Services:** The Self-Directed Private Equity Services we offer are primarily reserved for our **Capital Partners**, who typically become “transactional & gap funders”. We utilize our Capital Partners to fund deals on behalf of our Acquisition Partners. However, we only accept a select few Partners per month. And we ensure Partners keep control of their capital through strategic vestings, e.g. LLCs, Corps, or Trusts. The core mission of this program is to recapture earnings or capital gains lost to ordinary income taxation. And the pivotal feature is that each transaction is structured for our Capital Partners to maintain unilateral (Self-Directed) control over their money as it moves into and out of transactions (title or escrows) that we coordinate. Once engagement fees have been paid, no other fees are due until a viable project has been secured.

**How Much – How Long – What’s In It For You:** Every transaction will be different; however, our Partners should expect to infuse a minimal of \$5,000 per project (plus engagement fees). Hard-money transactions usually take the longest to get underwritten (10-20 days). However, we have lenders who quote as little as 5 days. Minimum ROI is 50% (cash on cash) for the first twenty thousand dollars, and 20% for every dollar thereafter. Maximum return limited to the amount of Capital Partner’s current year taxable income. Funds that are not deployed into a project(s) will earn two percent per annum over the prime lending rate. We may also consider a 10% convertible (1 year) “equity interest” in the company for a \$100,000 capital infusion.

Upon completion of three successful ventures, Partners who wish to scale upward with Avalon will be invited into our Principal Fund. To this regard, Partners will agree to place on deposit 20% (or more if desired) of the net gains attributable to projects initiated by Avalon PEG. Partners who **do not** wish to scale up may continue any ongoing transactions until we’ve reached the amount of their taxable income.

**Concierge Services:** (Identify - Harness - Harvest). The Concierge services we provide are primarily directed towards our **Acquisition Partners**, who typically become “end user buyers”. Once we come to an agreement on a specified area, we pre-canvas one or more projects in that area. From there we engage the sellers, agents, title officers, inspectors, contractors, insurance, **AND THE MONEY**. No fees due until a project has been secured. All to provide our Partners with a one-stop shop, full investment service & package.

While not mandatory, we highly recommend Acquisition Partners take advantage of our Portfolio Program which involves a simultaneous closing of 3 to 5 properties at a time. Portfolio creation versus one-off purchasing can create a cash surplus and ensure a single “one-off” circumstance does not jeopardize or stall a project or portfolio. And we only operate in the time and space of “today”. Not next week. Not next month. We don’t hold trainings or any drawn out on-boarding. We believe in “**Direct Content & Immediate Immersion.**”

**The Process:** The following is a summary of the progression of one of our Self-Directed Equity transactions:

1. First, we engage our Capital Partners with no initial money engagement or fees. We then match them with an Acquisition Partner / Project.	6. The first funding will be the hard money loan. THEN the transactional money. And THEN gap funding will be provided to close out the transaction of necessary.
2. We then select a project and both partners pay Avalon an engagement fee.	7. Money to pay off the transactional loan will come from the hard-money funding.
3. Once a project has been placed under contract, we then engage a hard-money source for the bulk of the purchase money.	8. Cap Partners maintain sole authority over their funds. Repayment comes directly from proceeds of the (Avalon PEG) transactional purchase and funding.
4. Once hard money has committed, we re-engage with our Capital Partner to have them agree to funding for one or more segments of the transaction. More than one deal could be closing at any given juncture.	9. The acquisition partner will then take control of the property. In most cases we will include pre-paid interest in the loans so all the Acquisition Partner must be concerned with is property matters.
5. We then arrange for OUR transactional funding to occur concurrently to the funding and recording of our Acquisition Partner’s closing.	10. Avalon will stay on as a consultant for one year. And while not mandatory, we highly recommend simultaneously closing a rotation of 3 to 5 properties.

Avalon PEG is a private firm only open to affiliates, affinity groups, members, or partners known to the principal or management. We are not lenders, legal experts, or financial experts. Returns on Capital cannot be guaranteed. **YOU COULD LOSE YOUR MONEY**. Prospective Partners should seek advice from an attorney or financial advisor prior to working with Avalon. Donations and In-Kind services are acceptable.

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Director

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