

HELPING OUR CLIENTS GROW THEIR WEALTH RAPIDLY

KEYCITY CAPITAL IS THE KEY TO YOUR LEGACY



We are a wealth acceleration
company that helps people
**CONNECT CAPITAL
TO WEALTH**





KCAP RE FUND III

DIVERSIFIED REAL ESTATE EQUITY FUND

08

8th Fund

Maximize liquidity with quarterly distributions and **equity returns** in a tax-advantaged fund structure leveraging KeyCity Capital's proven affordable residential real estate equity investment strategy

Equity Investments

Acquisition and management of “affordable” rental home and apartment communities

Primarily Class B value-add

KCAP RE FUND III | HIGHLIGHTS



Diversified Real Estate Equity Fund

A private real estate investment fund enables Managers to acquire assets designed to provide greater returns to investors.



Targeted AUM

\$550 million+ | 5,000+ apartment units targeted for future acquisition by KeyCity Capital's KCAP RE Fund III.



Quarterly Distributions

The Fund provides immediate cash flow from quarterly distributions of fixed, preferred returns along with annual profit sharing distributions.



Tax Efficient Investment

Investors benefit from flow through depreciation deductions designed to offset preferred returns and annual profit sharing distributions.



Annual Valuations

Annual valuation of Fund assets allows for consistent growth and the ability to invest based on the most current value of fund assets.



Current AUM

\$150 Million in Real Estate Assets under management with 1,600 total units in the portfolio.



Experienced Fund Manager

The Fund Manager has an impeccable financial record with no capital losses, no missed preferred dividends, and consistently exceeds targeted returns.



KCAP RE FUND III

DIVERSIFIED REAL ESTATE EQUITY FUND

Fund Type	Real Estate Acquisition Fund
Fund Investments	Real Estate Buy & Hold and Build to Rent
Direct/Indirect Security	Real Estate Deed
Fund Term	3-5 Years
Distribution Frequency	All Distributions Paid Quarterly
Targeted Quarterly Distributions	8-15% Annualized
Preferred Return	8%; Paid Before 2% Management Fee
Management Fee	2%
Targeted Annual Return Net to Investor	25%+ Net
Equity Split	80% to Investors & 20% to Operator, Upon Achieving 8% Preferred Return

Redemptions	Upon Maturity
IRA Investment Option	Yes
Tax Treatment	Ordinary Income with Depreciation
Target Fund Size	\$50 Million
Target AUM Size	\$550 Million
Minimum Investment	\$100,000
Must Be Accredited	Yes
3rd Party Audited Financials	Yes <i>(at the discretion of the Fund Manager)</i>
Reporting Frequency	Quarterly

ABOUT US

KEYCITY CAPITAL is a world-class private equity and wealth acceleration firm. We serve accredited investors and high net worth individuals with comprehensive wealth advice and extremely attractive investments in the industry. Through using proprietary tools, we develop custom wealth strategies that blend investment diversification with personalized tax, income, and savings plans. Our world-class investment funds help investors diversify into distressed real estate and alternative assets, earn consistent passive income with high-yield returns while providing liquidity and security. By rapidly growing wealth for our investors, we empower our investors to obtain personalized financial independence. Our team blends years of proven experience across wealth advice, finance, tax, accounting, and private capital management, through hundreds of successful investments. As a result, KeyCity Capital has attained industry-leading returns while minimizing risk through investing in multifamily and single-family real estate and unique alternative cash-flowing asset-backed investments. Our philosophy and focus on income-producing, affordable housing in target specific markets combined with diversification in unique alternative asset-backed investments generates our partners consistent cash flow and double-digit returns.



Managing Partners | Who We Are

A Unique blend of skills across Real Estate, Capital and Wealth Management



Tie Lasater, MAcc

Chief Executive Officer

Founder, KeyCity Capital

13 Years Real Estate Investing and Private Capital Placement

KPMG International

Closed over 1,000 real estate transactions combined totaling over \$250M

\$150 Million AUM

Masters & B.S in Accounting, Abilene Christian University



Charles Dombek, CPA

President & Chief Client Officer

Senior Partner, KeyCity Capital

Manages over \$350m in Capital

Originated Over \$300m in Asset Backed Loans

Closed over 1,000 real estate transactions combined totaling over \$250M

Former Big 4 Tax Manager at EY

B.S. in Accounting, Virginia Tech

MBA, College of William & Mary



Boone Lasater

Chief Operating Officer

Founder, KeyCity Capital

13+ Years in Real Estate, Accounting, and Private Equity

Former Assistant Controller for PE Oil and Gas

Closed over 1,000 real estate transactions combined totaling over \$250M

B.S. in Accounting,

Tarleton State University



Leigh Archer

Chief Acquisitions Officer

Founder, KeyCity Capital

13+ years in Real Estate

Former CEO of Keller Williams, Denver

International Business Experience & Fluent in three languages

Closed over 1,000 real estate transactions combined totaling over \$250M

B.S. in Business Management, Tarleton State University

Our Leadership Team | Who We Are



Mark Mize, CPA
Chief Financial Officer

Over 25 years as a CPA
Highly regarded financial accounting and reporting executive
Founded Halcon Resources and executed a reverse merger with Ram Energy
Led team that raised over \$6 Billion in capital for multiple transactions
B.S. in Accounting, University of Houston



Meliea Ware
SVP of Operations

Over 14 years of management experience
Seven years of experience in the Real Estate industry
Uses her business and real estate background to integrate and grow KeyCity Capital to higher levels
B.A. in Psychology from West Texas A&M University



Thom Besso
Chief of Staff

Developed state of the art and progressive recruiting and candidate qualifying methods for clients stateside and internationally
Has traveled the country as a career development leader and speaker
B.A. Criminal Justice from The College of New Jersey
Holds a Black Belt in Chinese Kenpo Karate



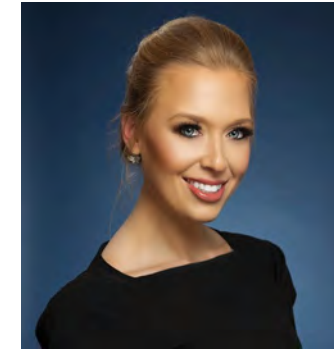
Ryan Nanney
Corporate Controller

Over 10 years of experience in managerial roles within Real Estate and Property Management
Five years as a Corporate Controller
Masters in Business Administration, The University of Texas at Arlington



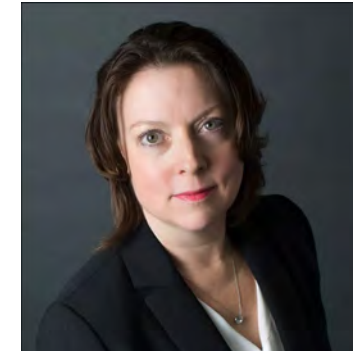
Meg Dubbs
Creative & Marketing Director

Over 25 years of experience in Design and Marketing
Expert in the cross-disciplinary fields of marketing and creative development
Masters of Design Management, Savannah College of Art



Jordan Jardine
Director of Investment Relations

B.A. in International Relations from Southern Methodist University
Former sales consultant with NexPoint Securities
Worked as a financial advisor at Merrill Lynch
Board member of the AiRs Foundation and Dallas Symphony Orchestra



Carey Erff
Director of Property Management

Over 15 years of multi-family property management experience
Has overseen portfolios in excess of 3,000 units
Juris Doctorate from Texas A&M School of Law
B.S. in Business Administration and Accounting from Lebanon Valley College in Annville, Pennsylvania

Where We Operate



Capital HQ
Southlake, TX



Operational HQ
Southlake, TX



Houston Region
Houston, TX

Disclaimer

The presentation presented herein is for discussion purposes only to assist the recipient in evaluating whether to conduct further due diligence as to the concepts contained herein. This presentation does not constitute (i) an offer, invitation or recommendation to purchase or sell securities, or enter into an investment transaction, or (ii) any form of legal or tax advice, opinion or recommendation. Neither the information contained in this presentation nor any further information made available in connection with the subject matter contained herein is intended to form or forms the basis of any future or present contract or arrangement or relationship with the recipient.

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Strategy:

WHAT WE INVEST IN

Residential Real Estate

Acquisition and management of value-add apartment communities and single-family homes





Our History



2004-11

Prior to KeyCity Capital being founded in 2018, the Managing Partners engaged in multiple real estate and alternative investment opportunities: running successful real estate brokerages, accounting practices, and consulting firms while simultaneously building a real estate portfolio

Brothers, Tie and Boone Lasater grew their personal real estate portfolio and began raising capital from private investors providing high returns on specific projects.

Zero investment loses in 17+years.



2012-16

Tie and Boone became full time real estate investors

Partnered with close inner-circle investors

Founded a construction company to perform the renovation and maintenance of the entire portfolio

Leigh became CEO of a high end Real Estate Brokerage growing his skills for targeting both marketed and off market properties



2017

Purchase, rehabbed, and sold 14 properties and acquired their first two multifamily properties.



Our History



2018

KeyCity Capital was founded by Tie, Boone, and Leigh

Launch of their first \$5M private equity fund

Acquired over 100 homes in under 90 days, plus two more multifamily properties

Future partner, Charlie Dombek began lending his private capital in the entertainment industry

Accolades: *Elite Legacy International Investor Hall of Fame Induction*

2019

KeyCity Capital continued our massive trajectory

Acquiring more than 225 properties

They increased their multifamily portfolio to six properties

Added their first six full-time employees

Launched their own Property Management Company

Accolades: *Entrepreneur Magazine | Top 100 Real Estate Company Inc. 5000 | Nominated for Inc. 5000 Fastest Growing Companies*

2020

In early 2020, KeyCity Capital diversified their investment opportunities and launched two new real estate investment funds, and one asset backed lending fund.

Assets under management grew to over \$350M

Acquired their first commercial office building which houses the main corporate office in Southlake, Texas

Grew to 25 members with three office locations

Accolades: *Nominated for Inc. 5000 fastest growing companies | Silicon Valley Review 50 Most Trustworthy Investment Firms | Who's Who in America*

Manager | Ability to Execute

KEYCITY CAPITAL



Vertically-integrated
Operator with over 1000+
completed projects



Zero Principal Losses



Always Exceed Targeted
Returns



CORE VALUES

A VALUE & DISCIPLINE CENTERED SYSTEM



Integrity



Teamwork



Extreme
Ownership



WIT:
Whatever It Takes



Servants
Heart



Raving Fans

60

More

Our Current Numbers

1000+

Total Real Estate
Projects Completed

100+

Total Asset
Backed Loans

1600+

Units Under
Management

\$350M+

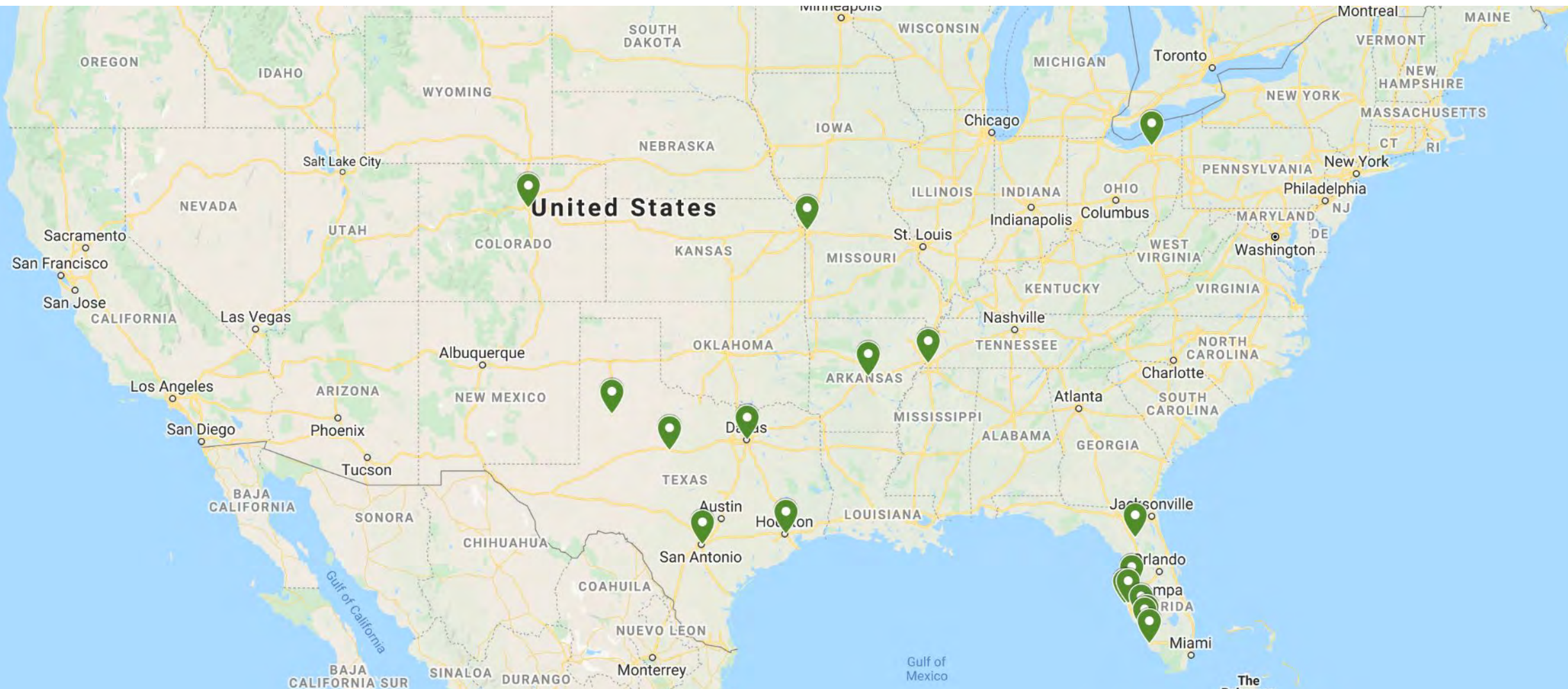
Total Assets Managed*

\$25M+

Total Annual Revenue

**AUM is the value of the assets KeyCity Capital manages which includes real estate and asset backed loans*

Investment Portfolio | Property Locations



Our Performance





Performance Track Record

GROWING OUR CLIENTS WEALTH RAPIDLY BY
CONNECTING CAPITAL TO WEALTH THROUGH
REAL ESTATE AND ALTERNATIVE INVESTMENTS

0

Months of missed
fixed or preferred
returns

0

Zero principal
losses

Double Digit Returns

For all equity investors, exceeded return
targets in all funds

LTD Fund Performance

Fund	Date Opened	Fund Term Status	Targeted Return	Inception to Date Returns
KCAP	2/17	2-year Closed to new investors	15%	20.2%
KCAP RE Fund I	3/18	2-year Closed to new investors	16%	21.7%
KCAP RE Fund II	4/19	5-year Closed to new investors	18%	23.4%
KX Wealth Fund I	4/19	3-year Closed to new investors	16%	22.6%
ALF I	6/18	1-year Closed to new investors	14%	14%
ALF II	4/20	1-year Closed to new investors	14%	14%
ALF III	11/20	1-year Closed to new investors	12%	12%
12X	4/20	1-year Closed to new investors	16%	20%

Historical Combined Fund Returns

Year	Combined Returns
2017	20.2%
2018	21.7%
2019	22.6%
2020	23.0%
2021	26.9%

Our Strategy





TARGET MARKET CRITERIA

Workforce Single & Multifamily Housing

Landlord Friendly States

Four Legs to Each Local Economy

- Higher Education
- Major Medical
- Strong Financial Market
- Diversity of Employers

Vertically Integrated with Construction
& Property Management

Geographic Target Criteria Defined

KeyCity Capital created a Geographical Target Criteria using the same formula that small and regional banks use when targeting locations for branch cities and locations.

#1: Higher Education Institutions: Colleges & Universities

Markets with higher education create a stable, secure, and appreciating economy with a diverse workforce from the jobs needed to service the educational community. The key to investing in this kind of market is to expand acquisitions to include student, workforce, and affordable housing.

#2: Major Medical Facilities and Hospitals

Markets with major medical facilities and hospitals, specifically those with residency programs, create consistent growth and robust medical economies which attract a diverse workforce. Thus, leading to a constant demand for affordable housing.

#3: Financial or Banking Market

Strong financial and banking markets possess both target criteria #1 and #2 and a small regional bank with local headquarters. Markets with these characteristics create a consistent financial structure and produce long-term consistency, growth, and infrastructure when vested heavily into a market.

#4: Diversity of Employers

We avoid markets where there is economic dependence on a single employer or a specific industry segment.

#5: Market Growth

Consists of the following three factors:

- Incomes are growing
- Jobs are growing
- People are moving into the market growing the population

INVESTING TO **ACCELERATE WEALTH**



Cash Flow
Equity
Appreciation
+ Tax Shelter

**Consistent Cash
Flow, Safe, Secure
and Double-Digit
Returns**

Investing to Accelerate Wealth Defined

These accelerators are not found in traditional financial investments.

They are found in two investment categories, Real Estate and Alternative Investments.

Cash Flow

consistent calculated cash return your investment generates through operational activities

Wealth is generated through investments that create passive cash flow. In Real estate and alternative investments, cash flow is recognized from the operations of the investment and distributed, thus, creating consistent and guaranteed passive income.

Equity

acquired and earned equity

Acquired: An investment with built-in equity that generates cash flow, reduces risk, and generates safe, secure, double-digit returns. Real estate and alternative investments with the correct acquisition and due diligence process are bought at significant discounts creating a low-risk investment with significant return potential.

Earned: When the tenant or the revenues are paying down the debt on the asset. We manage an operational asset and utilize our team, expertise, and industry-specific software to optimize the investment building equity and further reduce risk.

Appreciation

the growth an investment incurs

Make an investment, acquire a property, and year over year, it will grow in value. This Key is the only one that the traditional financial market generates. However, it is inconsistent, and often, the stated appreciation is reduced through fees or a financial crisis.

Tax Shelter

Tax efficient investments that help reduce and mitigate taxes

A tax shelter is created through real estate and alternative investments. Tax shelters provide tax advantages by offsetting preferred earnings and profit splits from the investments. In certain instances, excess tax losses may be used to offset other taxable earnings.



Why Multifamily?

Rentership is on the rise - **we are in a renter nation**

Home ownership is on the decline

Home ownership is starting later in life

Business is becoming more and more mobile requiring employees to move frequently

Younger generations are looking for flexibility

Family formation is happening later in life

Why B & C Class Properties

We target acquisitions in the B & C class market for the following reasons:

Largest demand product with the lowest supply

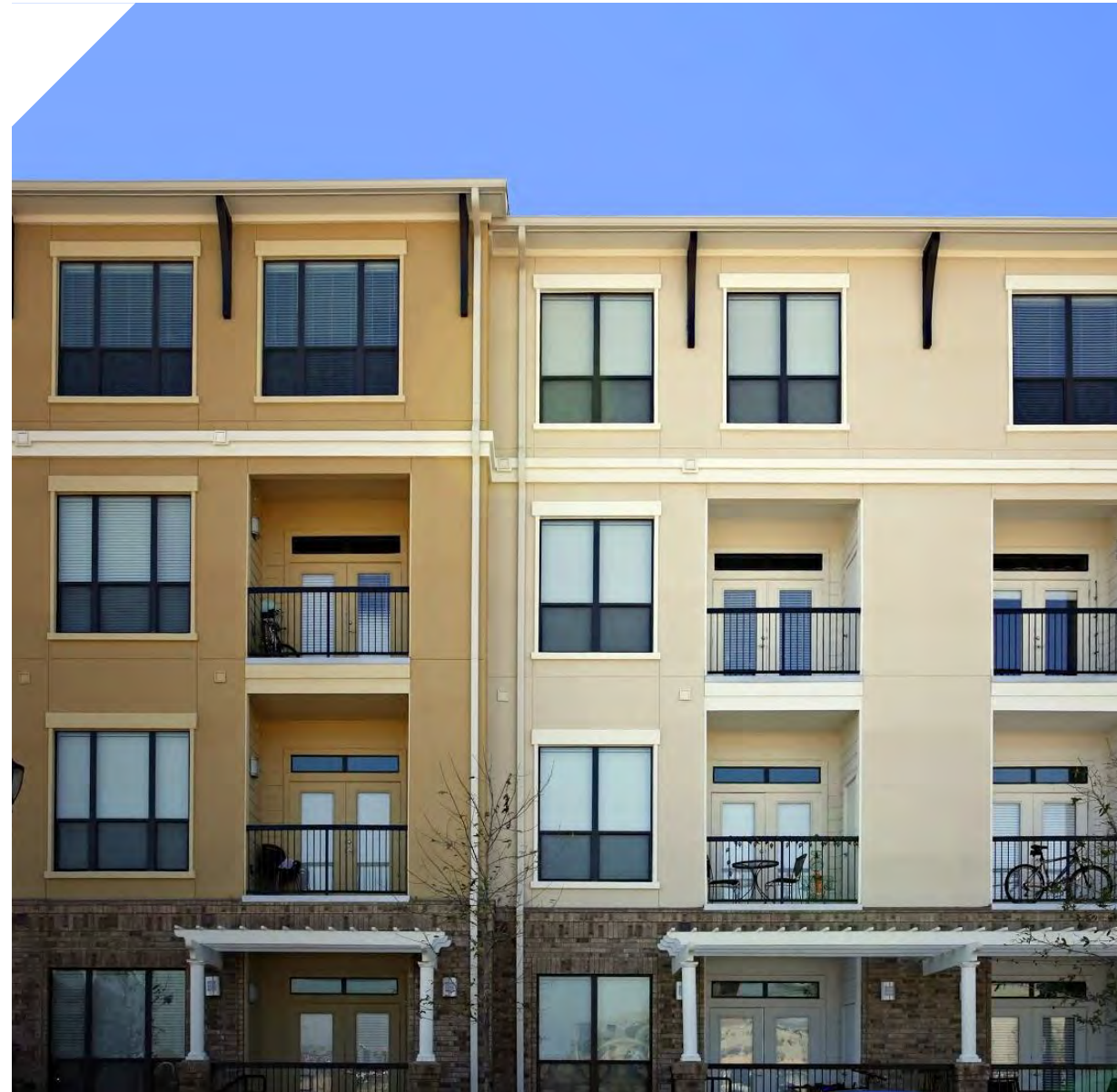
Nearly 70% of the U.S. population does not or cannot own their own home, and that continues to grow

Demand has outpaced supply by nearly 30% since the 1970s

We focus on providing a product for this market segment which creates the strongest market protection

In a recession, those occupying the A class product will relocate to B and C products

In a strong market the working class predominantly occupies the B and C products





Why Affordable Workforce Housing

Consistent cash flow

Supply versus demand

Rents and occupancy are expected to remain strong during a recession

Why Secondary/ Tertiary Markets?

Enormous demand for affordable workforce housing

Stronger returns

Less competition

Stability and diversification



Why Invest In the Southern States?

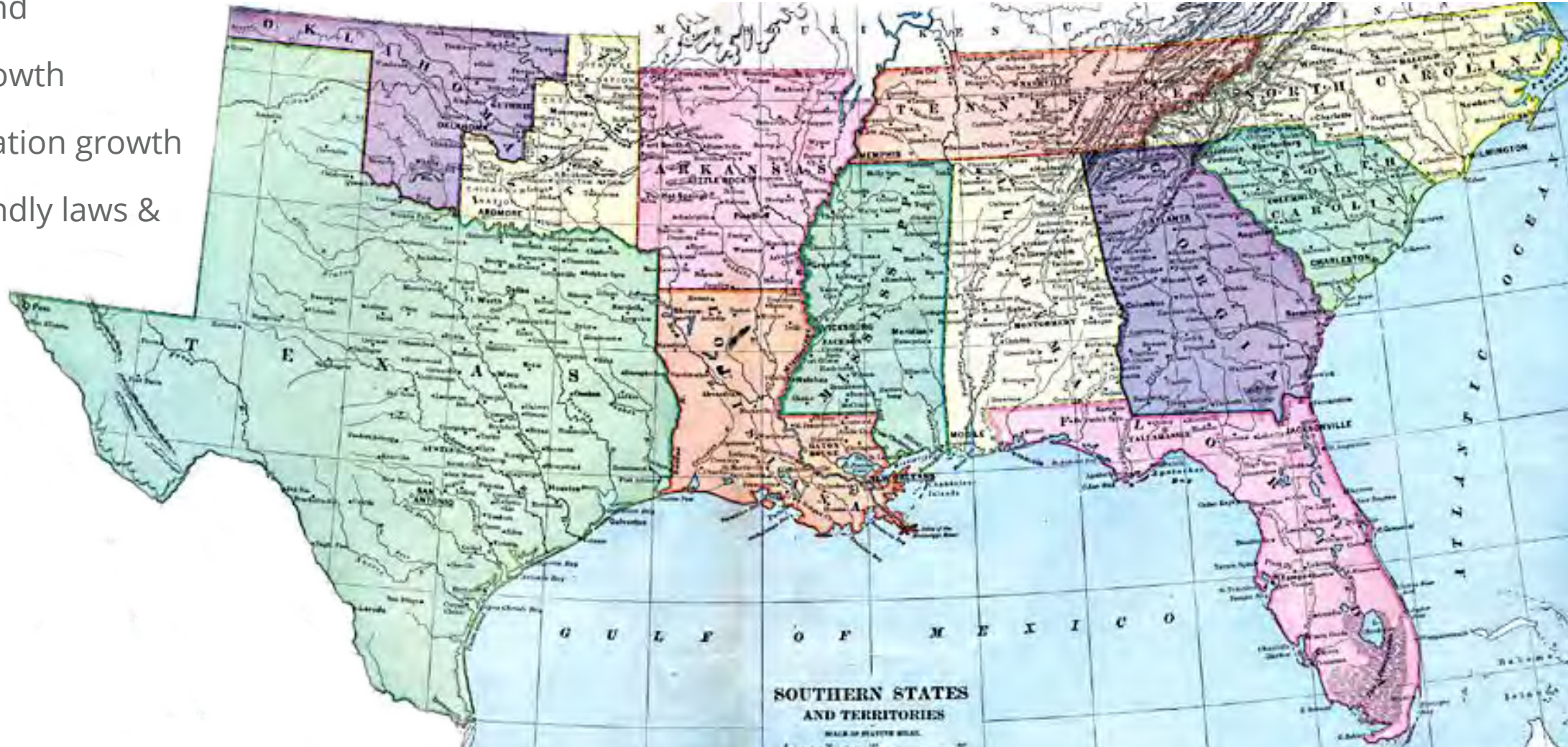
Strong demand

Strong job growth

Strong population growth

Landlord friendly laws & regulations

Tax favorable states





MARKET OPPORTUNITIES

This is one of the greatest windows of opportunity in our lifetime to invest in residential assets serving the unmet need for affordable housing across the nation

Housing prices and rents continue to climb upward due to limited inventory and low interest rates. Our Rents increased 10% year-over-year between 2020 and 2021

Demand for affordable housing remains at an all-time high in our target markets while supply and inventory levels are at all-time lows.

Housing supply remains constrained as demand grows in our target markets due to population shifts as a result of Covid and other structural economic changes in the northeast and upper midwest markets

Nearly all new housing constructed are Class A assets outside of the affordability range for a large percentage of renters and home buyers.



MARKET OPPORTUNITIES

Single family and apartment rental occupancy is at record highs.

Over the past decade, home ownership has declined from 69% to 61%

The largest growth in rentership demand comes from baby boomers.

New market segments, like “build-for-rent”, have contributed to rentership.

Societal changes, like shorter duration of employment and people living longer, are additional demand drivers.

COVID-19 lead to population shifts benefiting our target markets

Risk Mitigation: ACQUISITIONS



DUE DILIGENCE PROCESS





Disciplined **Buying**

The demand for workforce housing communities is at all time highs. Investors have been paying premiums for performing assets. We target properties that either have below market rents or significant deferred maintenance.

Our disciplined buying strategy and stringent underwriting requirements allow us to create a value add spread of nearly thirty percent within six months of acquisition on every property we acquire.

Disciplined **Buying**

Our underwriting standards support a stabilized cap rate of **8%** which is at least **2%** higher than market values (25%+ average acquisition discount to market value)

We use conservative assumptions

- 2% annual rent growth
- 2% annual expense growth
- 93-94% occupancy
- 150 basis point increase in cap rates at exit from current





Long-Term Non-Recourse Debt

KeyCity Capital is conservative on debt
(under 75% of value)

Average Loan to Value of approximately 62%
across KeyCity Capital's portfolio

Non-recourse financing

30 year terms with 7-12 years fixed

ACQUISITION **Case Studies**





How We Add Value

Exterior capital projects - roofs, parking lots, landscaping, etc.

Renovating and upgrading apartments

Adding amenities

Improving management

Driving up rents, increasing occupancy, decreasing maintenance costs, increasing tenant retention, etc.

BEFORE



Case Study

Westwood Apartments

Abilene, TX

Acquisition Price: \$1,050,000

Renovation: \$450,000

Value: \$2,220,000

Annual Cash Flow: \$166,444

Description

This apartment is located in the McMurry University area and is blocks away from a high school. Its location in Abilene, TX, is excellent. However, there were tenants in the property for up to ten years without ever having experienced a rent increase or executed a new lease.



AFTER



Strategy

Phase I: All remaining tenants executed new leases with market-rate rents. Upgraded ten units to include stainless appliances, granite, vinyl flooring, updated bathrooms and kitchens, and new a/c units.

Phase I improvements allowed us to increase rents 10% over what we originally expected.

Phase II: Renovations to 18 additional units which is nearing completion in July 2021

Phase I and Phase II results will increase the rent from \$144,000 at acquisition in November 2019 to \$308,280 once completed based on current rents.



BEFORE



Case Study

Executive Apartments

San Antonio, TX

Acquisition Price: \$3,960,000

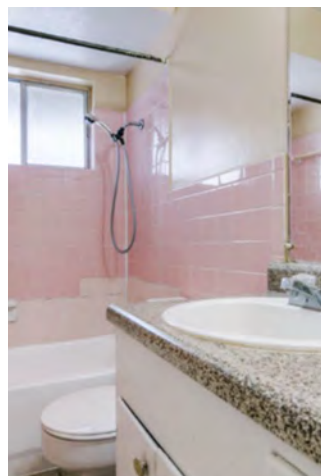
Renovation: \$821,000

Value: \$6,415,000

Annual Cash Flow: \$384,901

Description

Located in the heart of San Antonio, this property is just minutes away from Interstate 410 and McDermott Freeway and within 3.5 miles of St. Mary's University and the University of Texas Health Science Center San Antonio. Additionally, these apartments offer easy access to the Crossroads Mall, local dining, fantastic schools, and unique entertainment venues.



AFTER



Strategy

Cosmetic market rate upgrades to the units including, flooring, light fixtures, water conservation, new appliances, and countertops

Increased rents to market rate which generated a **23.5% increase in total revenue**

Minor exterior updates

Updated pool



BEFORE



Case Study

Cedar Duplex Community

Acquisition Price: \$490,300

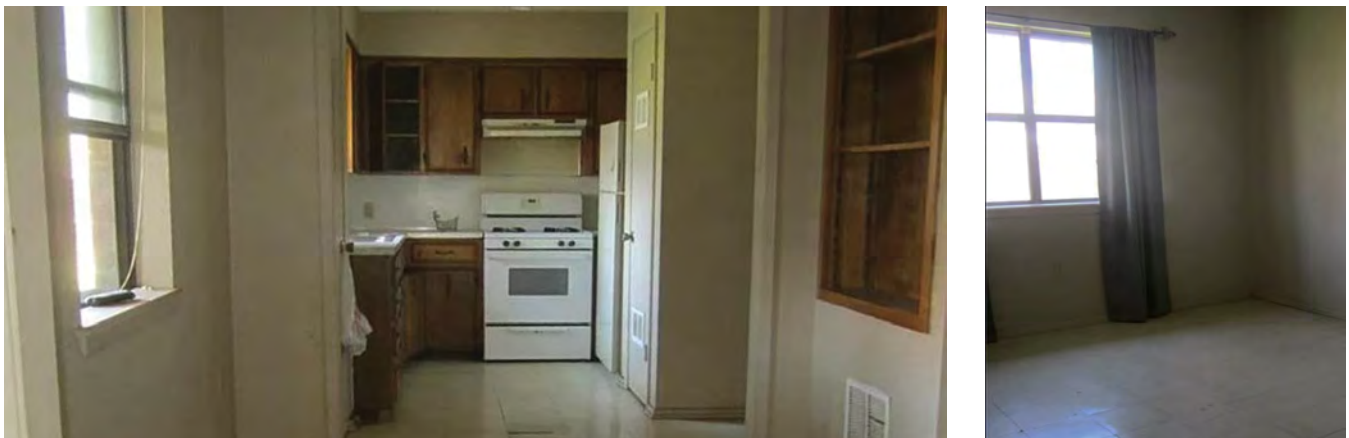
Renovation: \$102,500

Value: \$850,000

Annual Cash Flow: \$60,721

Description

This duplex community is located blocks from the major medical facility and hospital system and the Texas Tech Nursing School in Abilene, TX. The property offers safety from a private gated entrance, affordability, convenience, and upgraded 2-bedroom spacious units. There is a constant waiting list for occupants after the units become available.



AFTER



Strategy

This property was fully occupied when we acquired it and required light to moderate renovations.

It was fairly well maintained; however, the tenant base had been in the property for over three years.

The rent was below market value, and there were no leases in place.

Phase I: Included getting the existing tenants into a lease at a slight discount from the market rate, updating the units where tenants did not agree to a lease, and increasing rents on newly available updated units to market value.

Phase II: Development is about to begin and will include constructing four new buildings on the undeveloped land that was acquired with the existing buildings. In addition, rents are up 21% from \$43,200 when we acquired the property to \$52,200 now and a value of \$850,000.

BEFORE



Case Study

Pineridge

Gainesville, Florida

Acquisition Price: \$4,500,000

Renovation: \$698,982

Value: \$8,125,574

Annual Cash Flow: \$568,790

Description

Conveniently located in Gainesville, Florida, Pineridge is minutes from Gainesville Regional Airport, The University of Florida, and the North Florida Regional Medical Center. Additionally, this property is within close proximity to shopping, restaurants, and entertainment.



AFTER



Strategy

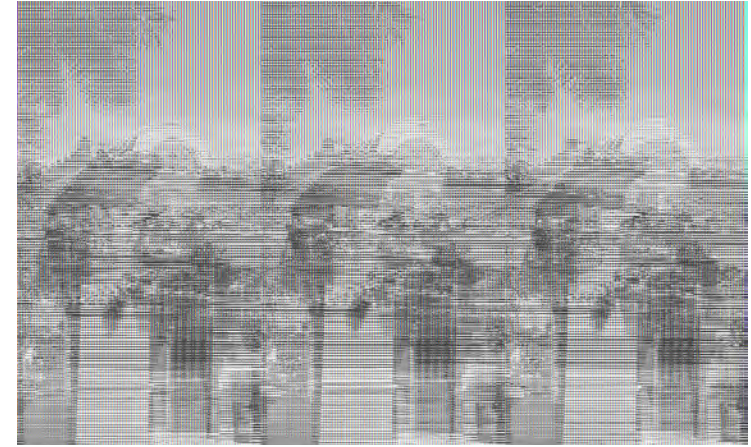
Significant increase to gross rent because the majority of the tenants are not on a current lease

Average length of occupancy is just over four years

Cosmetic market rate upgrades to the units including, flooring, light fixtures, water conservation, new appliances, and countertops

Implemented market rate rents which generated a **23.5% increase in total revenue**

Minor exterior updates



BEFORE Cape Coral, FL



AFTER Cape Coral, FL

Featured In

TRAVEL+ LEISURE

The Best Airbnbs in Florida – From Overwater Bungalows to Tree Houses

Get ready for an unforgettable vacation to the Sunshine State.

By **Hillary Maglin** | May 26, 2021

Each product we feature has been independently selected and reviewed by our editorial team. If you make a purchase using the links included, we may earn commission.

Modern Mediterranean Villa in Cape Coral

Nothing says vacation like your own indoor pool! With a perfect five-star rating, arcade games galore, and enough room for 12 guests, this newly remodeled Cape Coral home is guaranteed to impress even the most jaded travelers. Dreaming of the beach? Sanibel Island and Fort Myers Beach are just 10 minutes away by boat.

To book: [airbnb.com](https://www.airbnb.com), from \$697/night





Recap & Next Steps





EXECUTIVE OVERVIEW

KCAP RE FUND III

8th Fund in the past decade!

KeyCity Capital introduces its latest fund, the **KCAP RE Fund III: A \$50 million private equity fund.**

As the company's seventh investment fund, the KCAP RE Fund III allows for key benefits including the maximization of:

- Quarterly distributions
- A tax efficient investment fund structure
- Targeted Net 25%+ equity returns

All leveraging KeyCity Capital's proven residential real estate equity strategies



EXECUTIVE OVERVIEW

KCAP RE FUND III

8th Fund in the past decade!

Additional highlights include:

- Multiple B & C Class value-add properties create strong asset diversification, with very low market risk, strong cash flow, and exceptional equity growth
- Annual valuation of assets allows for consistent growth & the ability to invest based on the most current value of fund assets

KCAP RE FUND III | HIGHLIGHTS



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Manager | Ability to Execute

KEYCITY CAPITAL



Vertically-integrated
Operator with over 1000+
completed projects



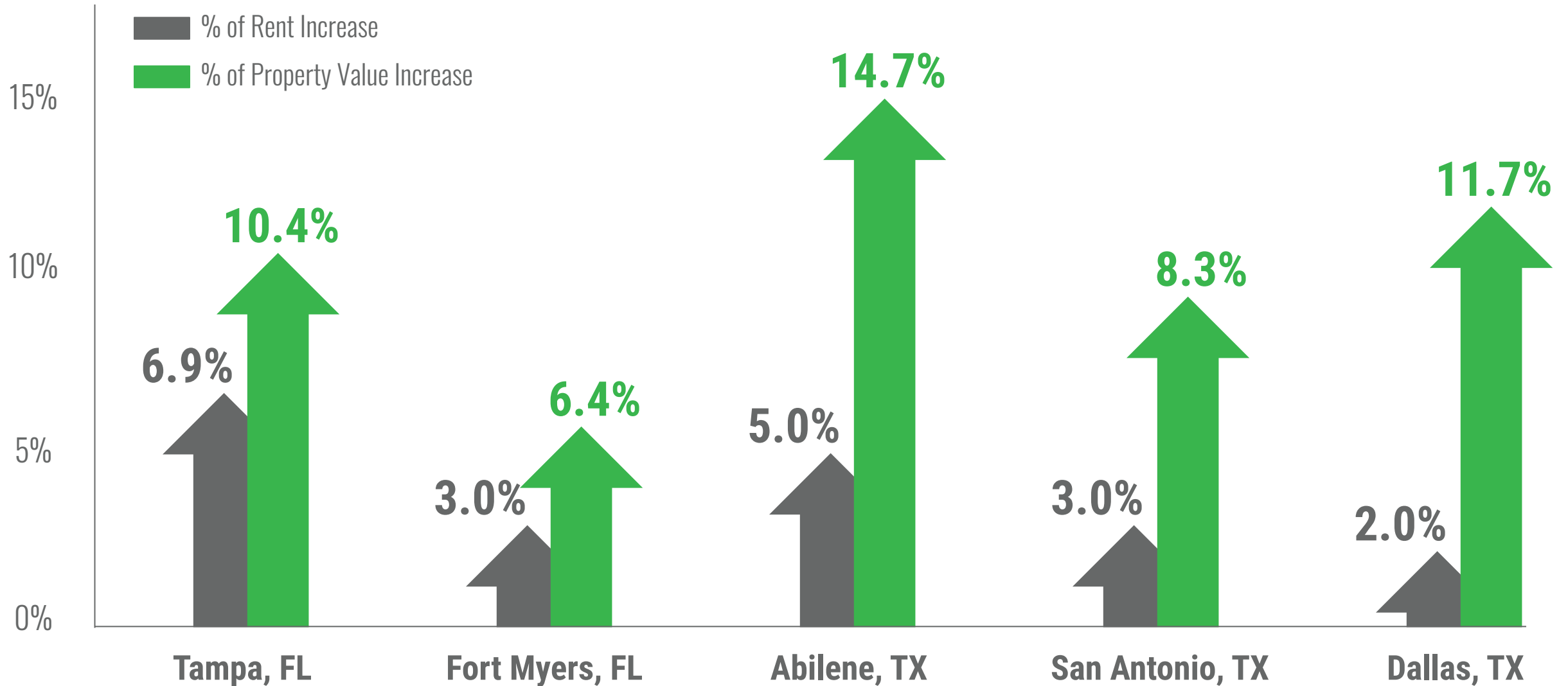
Zero Principal Losses



Always Exceed Targeted
Returns

KeyCity Capital Investment Markets

RENT AND PROPERTY VALUE INCREASES





Next Steps



Contact Us

Schedule A Meeting



Tie Lasater

Chief Executive Officer

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President & Chief Client Officer

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E: charlie@keycitycapital.com

Schedule Online at: calendly.com/kcapmeeting