



## 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 & Self-Storage facilities/development sites. Within Federal Opportunity Zones, Garretts primary focus is sites which are economically viable for ground-up development or re-development. This most frequently includes a multi-residential (apartments) 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, & hotel sites). Prior to joining Lee & Associates, he practiced at Grubb & Ellis (now: Newmark Knight Frank) where he completed development projects, 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 and the ongoing management and ownership of commercial real estate.

Within the past decade Garrett also gained valuable insight into other forms of analysis and investments by working as a 3rd party investment manager. Formerly licensed as a Securities Broker & Financial Advisor (FINRA Series 7 & 66 Licenses), this experience included building and re-balancing client portfolios containing publicly traded securities (Stocks, REIT's, Exchange Traded Funds, Commodity Funds, Exchange Traded Notes & 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 learner/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
- Real Estate Contract Law

**C** 949.722.7227

**O** 760.448.1363

**F** 760.582.9016

gsholer@lee-associates.com  
lee-associates.com  
1900 Wright Place, Suite 200  
Carlsbad, CA 92008  
License ID: 01172325

### 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