

FOR SALE OR LEASE

33302 Valle Rd, #100, San Juan Capistrano, CA 92675

±8,900-SF Owner-User Office Condo with I-5 Freeway Frontage



INSURANCE
SOLUTIONS

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Market. This section contains a Purchase vs. Lease analysis, loan illustration, potential depreciation scenario, and key sale comps demonstrating 33302 Valle Rd, #100 is priced attractively. **Pages 10-13**

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SUMMARY

Offering **33302 Valle Rd, #100, San Juan Capistrano, CA 92675**

Lower-level full-floor office condo (Insurance Solutions is the upper unit and the available unit has similar sign rights). This **high-end development** was built in 2006 in highly desirable South Orange County.

Size **±8,900 square feet** within a professional business park.

Sale Price **\$2,665,000** (±\$299 per square foot)

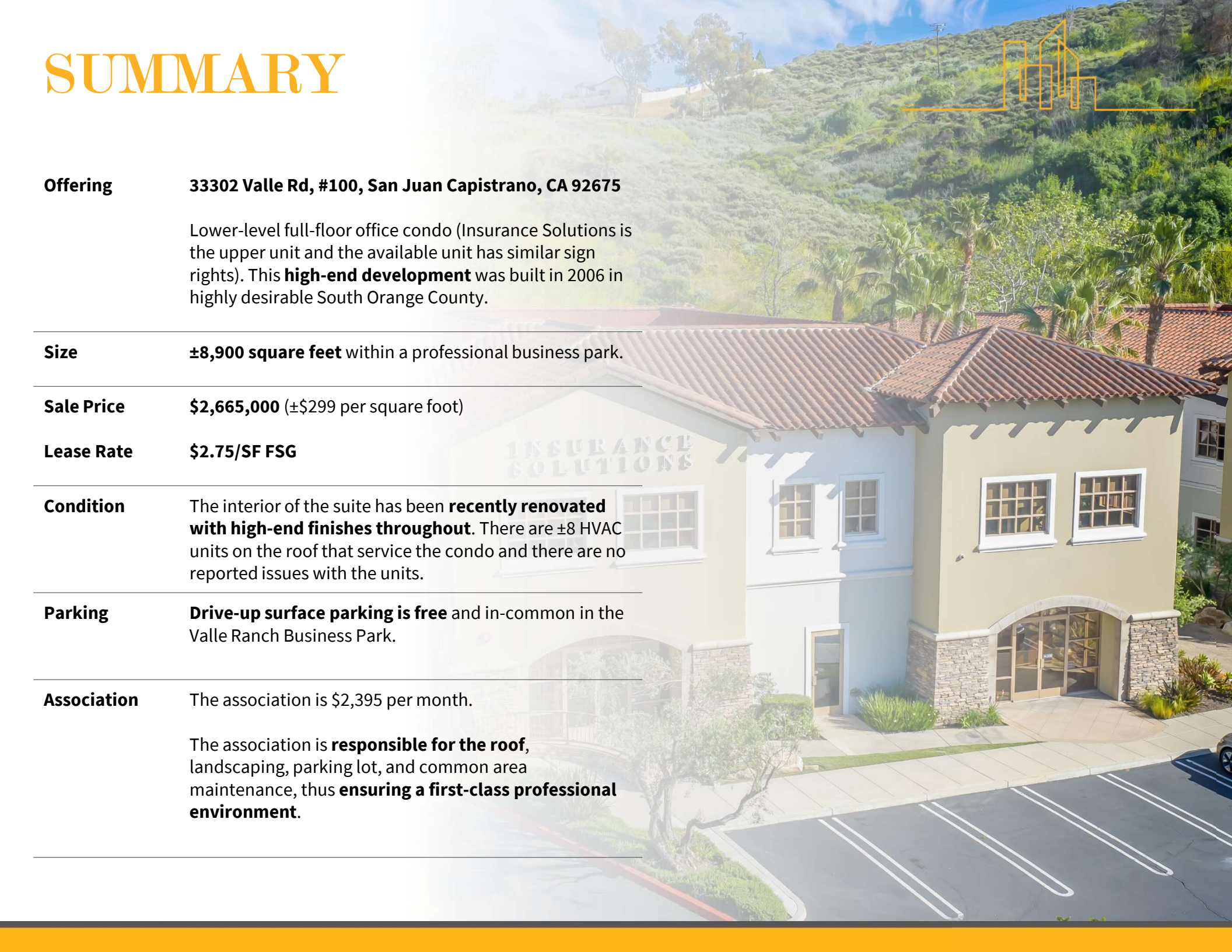
Lease Rate **\$2.75/SF FSG**

Condition The interior of the suite has been **recently renovated with high-end finishes throughout**. There are ±8 HVAC units on the roof that service the condo and there are no reported issues with the units.

Parking **Drive-up surface parking is free** and in-common in the Valle Ranch Business Park.

Association The association is \$2,395 per month.

The association is **responsible for the roof, landscaping, parking lot, and common area maintenance, thus ensuring a first-class professional environment.**



HIGHLIGHTS

What Makes 33302 Valle Rd, #100 Unique?

- **Prime San Juan Capistrano location** with immediate access to the I-5 Freeway, less than 10 minutes to River Street Marketplace, and less than 15 minutes to Dana Point Harbor.
- The property features a **high-image interior buildout with modern, creative finishes** and an upgraded lobby, offering a strong corporate presence.
- **Exceptional owner-user opportunity** with **flexible occupancy** options.
- Opportunity to lease out two suites with their **own exterior entrances, providing income to offset ownership costs.**
- Located within **close proximity to numerous local attractions and retail destinations** (see Location & Amenities Map – Page 5), enhancing employee convenience and tenant appeal.
- **Priced to sell at \$299/SF**, this offering is an attractive value compared to the sale comps on Page 13.
- **The upstairs condo**, also 8,900-sf, is also **for sale but priced \$55/sf higher at \$354/sf.**
- A **cost segregation study** can reclassify 10–30% of its basis into short-life assets that qualify for **100% bonus depreciation**, reinstated by the One Big Beautiful Bill Act (effective for property placed in service after Jan 19, 2025). This lets an owner immediately expense those components in year one, often generating **substantial federal tax savings** and stronger early cash flow.



LOCATION & AMENITIES

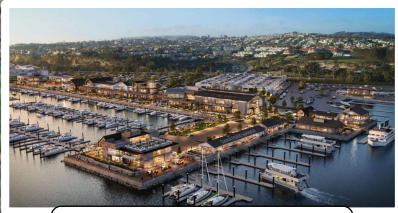
Prime San Juan Capistrano Location in the Vicinity of Major Attractions and the I-5 Freeway



River Street Marketplace



Mission San Juan Capistrano



Dana Point Harbor

**33302 Valle Rd,
#100**

**Proposed Residential
& Retail Development**



PHOTOGRAPHS

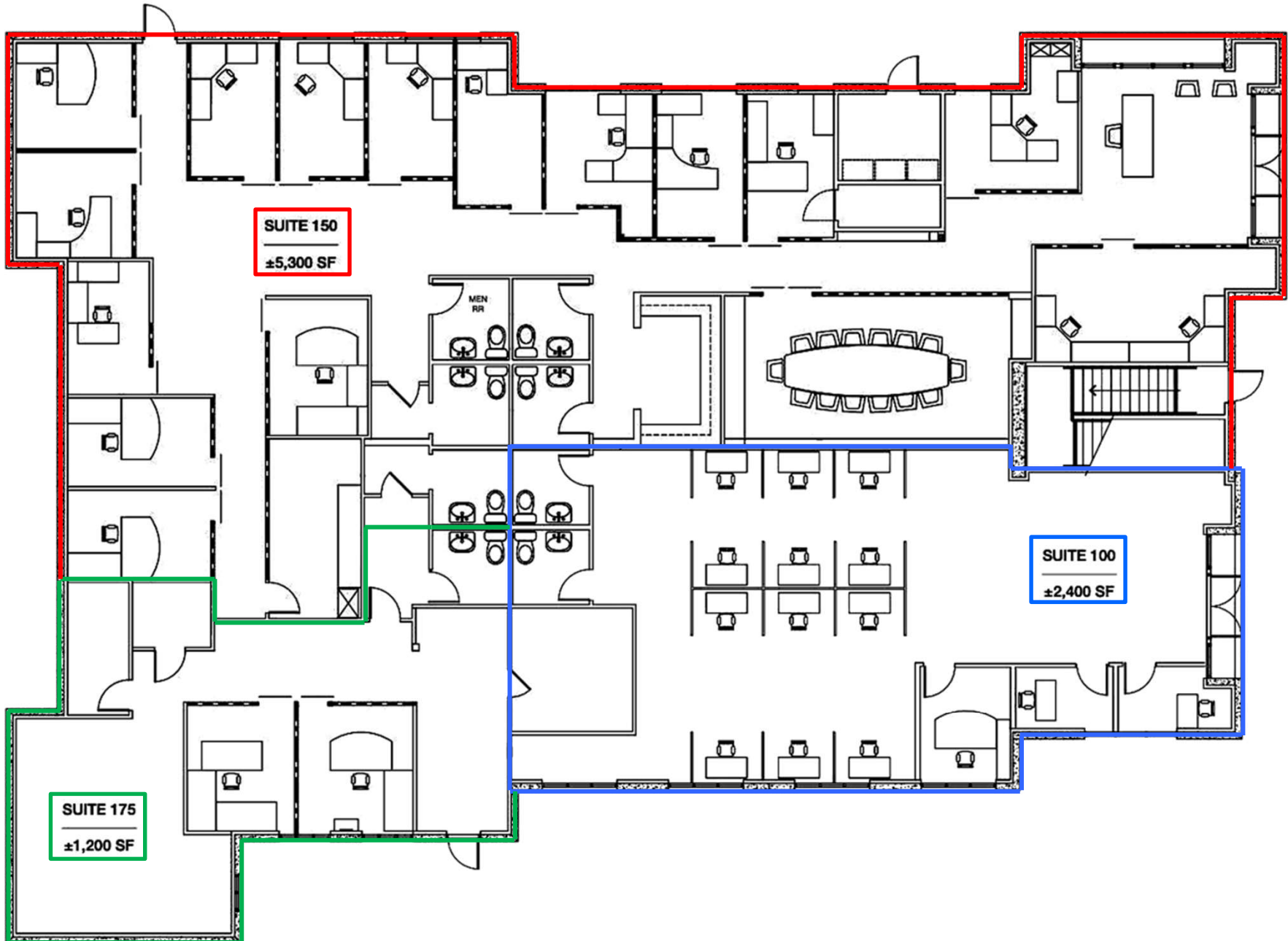






FLOOR PLAN

Currently Built Out as Three Suites (All Vacant)



PURCHASE VS. LEASE



Estimated 10-Year Savings of \$1,120,000 Plus Appreciation and Depreciation

Situation: Business owner purchases and occupies 33302 Valle Rd, #100 for \$299/SF, with an initial investment of \$30/SF (10% down + estimated closing costs).

Estimated Monthly Costs

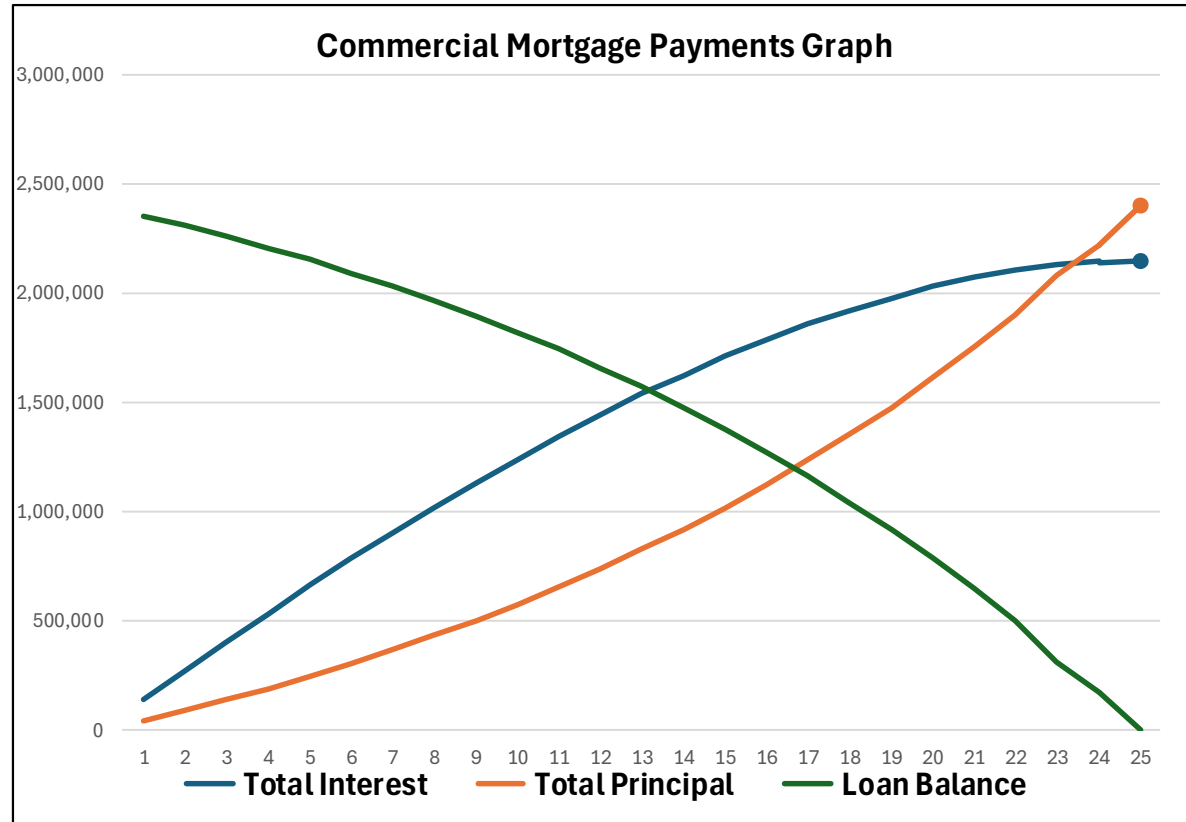
Typical Operating Expenses	\$0.83
Mortgage Payment	\$1.70
Amount of Principal in Mortgage Payment*	\$0.40

*This money is simply cash being converted to savings

Estimated Monthly Cost to Own Year 1	\$2.13
Estimated Starting Lease Rate	\$2.75

The advantage of owning over leasing increases every year. Assuming lease rates increase by 3% annually and operating expenses increase by 2.5% annually, below is a ten-year comparative analysis of purchasing vs. leasing (per square foot):

Year	Lease Rate	Ownership Cost	Annual Savings	Cumulative
1	\$2.75	\$2.13	\$7.47	\$7.47
2	\$2.83	\$2.12	\$8.50	\$15.97
3	\$2.92	\$2.12	\$9.57	\$25.54
4	\$3.00	\$2.11	\$10.68	\$36.22
5	\$3.10	\$2.11	\$11.84	\$48.05
6	\$3.19	\$2.10	\$13.04	\$61.09
7	\$3.28	\$2.09	\$14.29	\$75.38
8	\$3.38	\$2.08	\$15.59	\$90.97
9	\$3.48	\$2.07	\$16.94	\$107.91
10	\$3.59	\$2.06	\$18.35	\$126.27



LOAN ILLUSTRATION



Purchase Price \$2,665,000	SBA 7(a)
Down Payment	\$266,500
Combined LTV%	90%
Loan Amount	\$2,398,500
Financed Fee	\$0
Rate (%)	5.80%
Amortization (Years)	25
Term (Years)	25
Total Monthly Loan Payments	\$15,162

Estimated Closing Costs	SBA 7(a)
SBA Guaranty Fee (Financed)	TBD
Appraisal	TBD
Environmental Report	TBD
SFR	TBD



BENEFITS OF DEPRECIATION



Assume a business owner or trust personally purchases the building and leases it to his/her business at a market rate (this is allowable under the SBA program). This enables the owner to convert business income to real estate income sheltered in part by depreciation. In terms of this scenario, depreciation is the spreading of cost over the useful life of an asset. Simply stated, a portion of the cost of the building (excluding land) reduces taxable income, and thus tax liability, for a period of 10 years in this example. Cost segregation and depreciation schedule should be confirmed with a tax professional.

In this scenario, let us assume the following facts:

Purchase Price:	\$ 2,665,000
Building Size:	8,900
Percentage of Building Value to Land:	65/35%
Owner's Personal Income Tax Bracket:	50%

The amount subject to depreciation, in this example, is 65% of \$2,665,000, or \$1,732,250. Spread over 10 years, the deduction per year is approximately \$173,000. At a tax rate of 50%, the tax savings due to depreciation would be approximately \$87,000 per year of ownership. If you are considering this on a monthly per-square-foot basis consistent with the example on the previous page, this tax savings equates to an additional ownership benefit of \$0.81/sf per month. As time progresses, the cost basis of the building is being reduced by depreciation accumulated since purchase. Should the owner decide to sell, the depreciation is recaptured and taxed, but typically at a lower rate than ordinary income rate used when the deduction was realized. This yields an overall tax benefit during the building ownership period, especially if the building is kept and passed down to future generations.




*This example is for informational purposes only and may not reflect your specific situation. Tax laws and regulations are subject to change. Please consult a qualified tax professional, CPA, or tax attorney to determine how these concepts apply to your circumstances.



SALE COMPS

33302 Valle Rd, #100 is a Clear Value



Property	Sale Date	Size	Price P.S.F.	Market Insight
 26035 Acero Mission Viejo	Mar 2025	6,790 SF	<u>\$2,680,000</u> \$394/sf	This office building located in a business park sold to an owner-user in March 2025 for \$394/SF. 33302 Valle Rd, #100 has a higher image interior buildout yet is priced nearly \$100 per square foot less, offering a clear value.
 33332 Valle Rd, B San Juan Capistrano	Feb 2025	8,416 SF	<u>\$2,600,000</u> \$309/sf	33332 Valle Rd, B is the top unit, is located next door, and sold in February 2025 to an owner-user for \$309/SF. As a first-floor condo with a higher-image interior buildout, 33302 Valle Rd, #100 should be worth much more per foot, yet is priced less per square foot.
 33332 Valle Rd, A San Juan Capistrano	June 2024	8,416 SF	<u>\$3,200,000</u> \$380/sf	33332 Valle Rd, A is the bottom unit, is also located next door, and sold in June 2024 to an owner-user for \$380/SF. 33302 Valle Rd, #100 is priced \$81 per square foot less than the most comparable comp offering a buyer a clear value.



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