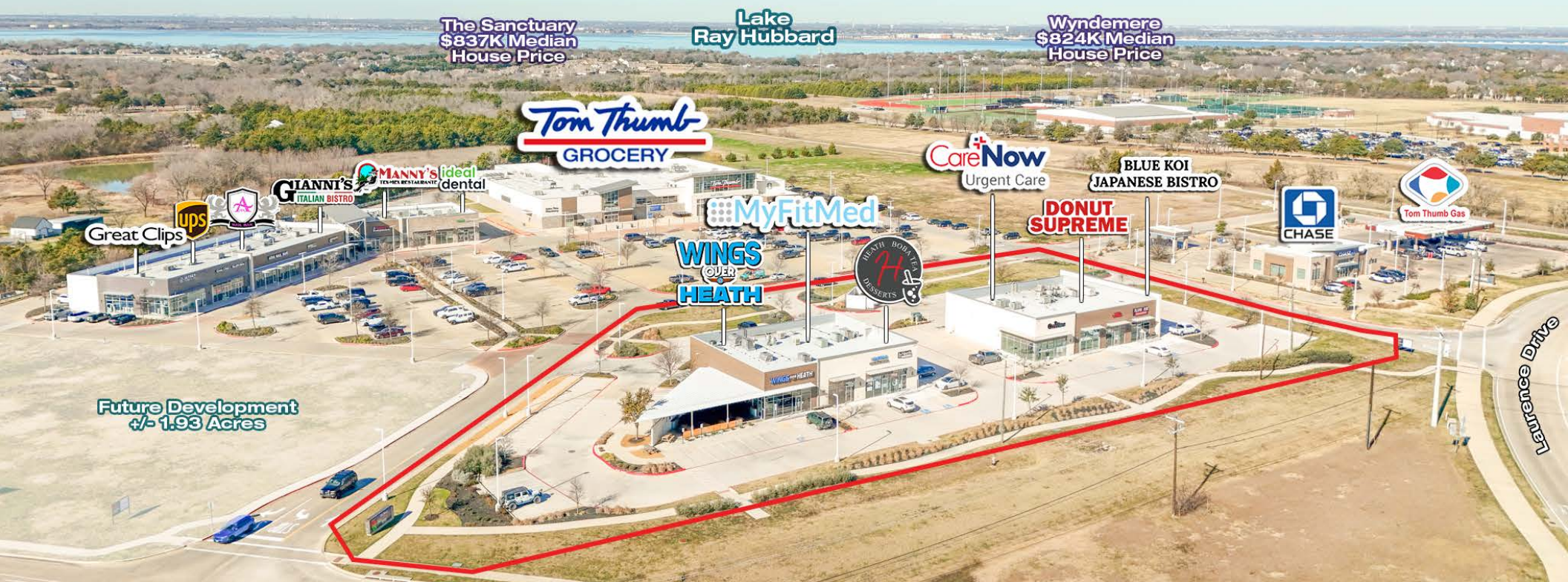




HEATH TOWN CENTER PHASE II (TOM THUMB SHADOW ANCHORED) 517 & 539 LAURENCE DRIVE, HEATH, TEXAS 75032



SHOP^{COS.}

CONFIDENTIAL OFFERING MEMORANDUM

HEATH TOWN CENTER PHASE II (TOM THUMB SHADOW ANCHORED)

LOCATION

517 & 539 LAURENCE DRIVE
HEATH, TEXAS 75032

OFFERED BY

Tommy Tucker

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Tyler Albin

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DISCLAIMER: This confidential Offering Memorandum has been prepared by Shop Investment Sales, LLC ("SIS") for use by a limited number of parties and has been obtained from sources believed to be reliable. The material contained herein shall be used for the purposes of evaluating the Property for acquisition and shall not be used for any purpose or made available to any other person without the express written consent of SIS. SIS and Owner make no guarantee, warranty or representation about the information contained herein. It is your responsibility to confirm, independently, its accuracy and completeness. You should conduct your own independent investigation and assessment of the contents of this Offering Memorandum, make such additional inquiries as you deem necessary or appropriate and form your own projections without reliance upon the material contained herein. No representation is made by SIS or Owner as to the accuracy or completeness of the information, and nothing contained herein is or shall be relied on as a promise or representation as to the future performance of the Property. The information contained in this presentation is highly confidential and subject to change. By accepting and reviewing this Offering Memorandum, you agree to maintain the confidentiality of the information contained herein and agree that you will not reproduce or distribute such information to any other person or use such information for any purpose other than to evaluate your potential interest in the Property and will not use the presentation or any of the contents in any manner detrimental to the interest of the Owner or SIS. SIS expressly disclaims any and all liability for statements or representations, express or implied, contained herein or for omissions from the Offering Memorandum or for any other written, oral or other format of communication transmitted to any entity/prospective investor in the course of its evaluation of the proposed transaction. At their sole discretion Owner and SIS each expressly reserve the right to reject any or all expressions of interest or offers regarding the Property and/or terminate discussions with any entity/prospective investor at any time with or without notice. Owner shall have no legal commitment or obligations to any entity/prospective investor reviewing this Offering Memorandum or making an offer to purchase the Property unless and until such offer is approved by Owner, a written agreement for the purchase of the Property has been fully executed, delivered and approved by Owner and its legal counsel, and any obligations set by Owner thereunder have been satisfied or waived.



SHOP Investment Sales have been exclusively retained to offer the opportunity to acquire Heath Town Center Phase II (the “Property”), a newly constructed 13,927 square foot, 6-tenant retail center adjacent to strong retail, shadow anchored by Tom Thumb in Heath, Texas. Built in 2022, the Property is 100% leased to a complementary mix of food, service and medical tenants with an average lease expiration of July 2032. Heath Town Center Phase II benefits from an average household income over \$246,200 within a one-mile radius in an affluent and high growth Dallas Fort Worth submarket.

INVESTMENT OVERVIEW

- 100% Leased, 6-Tenant Retail Asset Located in Affluent Submarket of Heath, TX (DFW)
- Average Household Income Exceeds \$246,200, \$170,100 and \$132,700 in 1, 3 and 5 Mile Radii, Respectively
- Average Lease Expiration of July 2032 with 5 of 6 Tenants Experiencing Rent Bumps During Primary Term
- 2022 Construction with Partial Masonry Construction, Shallow Bay Depth & Direct Frontage to Laurence Drive and FM 549
- Tom Thumb Shadow Anchored
- Minutes from Travis Ranch, 1500+ Acre Master Planned Community
- Population Growth of More than 157% from 2000-2025 Within 5-Mile Radius
- Notable Retailers in Close Proximity Include Tom Thumb, Costco, CVS Pharmacy, UPS, Tom Thumb Fuel Center, Starbucks, Great Clips, Chase Bank & More

Heath Town Center Phase II is a recently constructed 13,927 square foot retail asset in the high growth DFW submarket of Heath, Texas. Positioned on the hard intersection of Laurence Drive and South Farm to Market 549, the Property is approximately 30 minutes northeast of Downtown Dallas. Heath Town Center Phase II is 100% leased to a complementary mix of food, service and medical tenants which includes Wings Over Heath, MyFitMed, Heath Boba Tea, Care Now, Donut Supreme, and Blue Koi Japanese Bistro with an average base lease expiration of July 2032. Five of six tenants experience rent escalations during their primary lease terms. Built in 2022, the Property benefits from frontage to the Laurence Drive and South Farm to Market 549 intersection, partial masonry construction and shallow bay depth. Nearby retailers include Tom Thumb, Costco, CVS Pharmacy, UPS, Tom Thumb Fuel Center, Starbucks, Great Clips and Chase Bank among others.

Heath Town Center Phase II is strategically positioned on the hard corner of the intersection of Laurence Drive and South Farm to Market 549, which boasts combined traffic counts in excess of 34,200 vehicles per day. Laurence Drive, a north south thoroughfare that extends from Interstate 30 to South Farm to Market 549, has experienced compelling growth in retail development to complement the trade area's rapidly increasing population. Located approximately 10 minutes north of the Property near the intersection of Interstate 30 and Highway 205 is over 3,300,000 SF of retail, restaurant and entertainment GLA. National tenants near the intersection include Walmart Supercenter, Target, Costco, JCPenney, Best Buy, Hobby Lobby, T.J. Maxx, PetSmart, Dollar Tree, Belk, The Home Depot, Lowes, Michaels and Ross Dress for Less among numerous others. Interstate 30, a major east-west thoroughfare seeing over 116,100 vehicles per day, provides convenient access to Downtown Dallas and many other essential DFW

transportation routes. Just 1.5 miles west of Heath Town Center Phase II is the 22,000-acre Lake Ray Hubbard, a major Collin County tourist attraction for recreational boating, fishing, sailing and hiking. Along the east coast of Lake Ray Hubbard off Interstate 30 is The Harbor Rockwall, which is home to over 130,000 SF of restaurant, office and retail GLA. The Harbor Rockwall features an assortment fine dining, weekly concerts during the summer, a beautiful view and over 83,200 annual visitors. Retailers within The Harbor Rockwall include The Brass Tap, Rodeo Goat, Gloria's, Campisi's, Rocky Mountain Chocolate, Sideways BBQ, City Salon Suites & Spa and numerous others. Minutes south of the Property along FM 740 is Travis Ranch, a 1,500+ acre master-planned community situated along the shores of Lake Ray Hubbard, offering a blend of natural surroundings and thoughtfully designed residential development. The community features a resort-style amenity center with a pavilion, splash park, swimming pool, playground, and expansive greenbelts, and is served by on-site schools within the Forney and Rockwall Independent School Districts. With approximately 1,000 acres dedicated to future commercial, mixed-use, and retail development, Travis Ranch provides convenient access to the broader Dallas-Fort Worth metroplex. Additionally, Heath Town Center Phase II has close proximity to Rockwall Heath High School which boasts over 2,900 students as well as Maurice Cain Middle School which has a current enrollment of over 1,100 students.

Within a five-mile radius of the Property the population grew by over 157% from 2000 to 2025. Average household income exceeds \$246,200, \$170,100 and \$132,700 in one-, three-and five-mile radii, respectively. Overall, Heath Town Center Phase II offers an investor a recently constructed retail center with a complementary tenant mix with long primary lease terms located in the high-growth North Dallas submarket of Heath, Texas.

EXECUTIVE SUMMARY

PROPERTY PROFILE

LOCATION

517 & 539 Laurence Drive
Heath, Texas 75032



**BLUE KOI
JAPANESE BISTRO**



**DONUT
SUPREME**

YEAR BUILT
2022

PERCENT LEASED
100%

BUILDING SIZE
13,927 SF

LAND AREA
3.08 Acres

PRICING
\$8,520,000

CAP RATE
6.35%

TRAFFIC COUNTS
Laurence Drive
FM 549

26,799 VPD-25
7,461 VPD-25

KEY TENANTS

TENANT	SF	% OF SF	LEASE EXP.
Care Now	3,500 SF	25.13%	September 2032
MyFitMed	1,552 SF	11.14%	September 2028
Heath Boba Tea	1,000 SF	7.18%	June 2033
Wings Over Heath	3,500 SF	25.13%	March 2034
Donut Supreme	1,000 SF	7.18%	April 2033
Blue Koi Japanese Bistro	2,000 SF	14.36%	April 2033

DEMOGRAPHICS

VARIABLE	1 MILE	3 MILES	5 MILES
2025 Total Population	2,556	23,488	71,171
2025 Avg. Household Income	\$246,225	\$170,159	\$132,753
2025 Total Households	880	7,954	25,940

ADDITIONAL INFORMATION



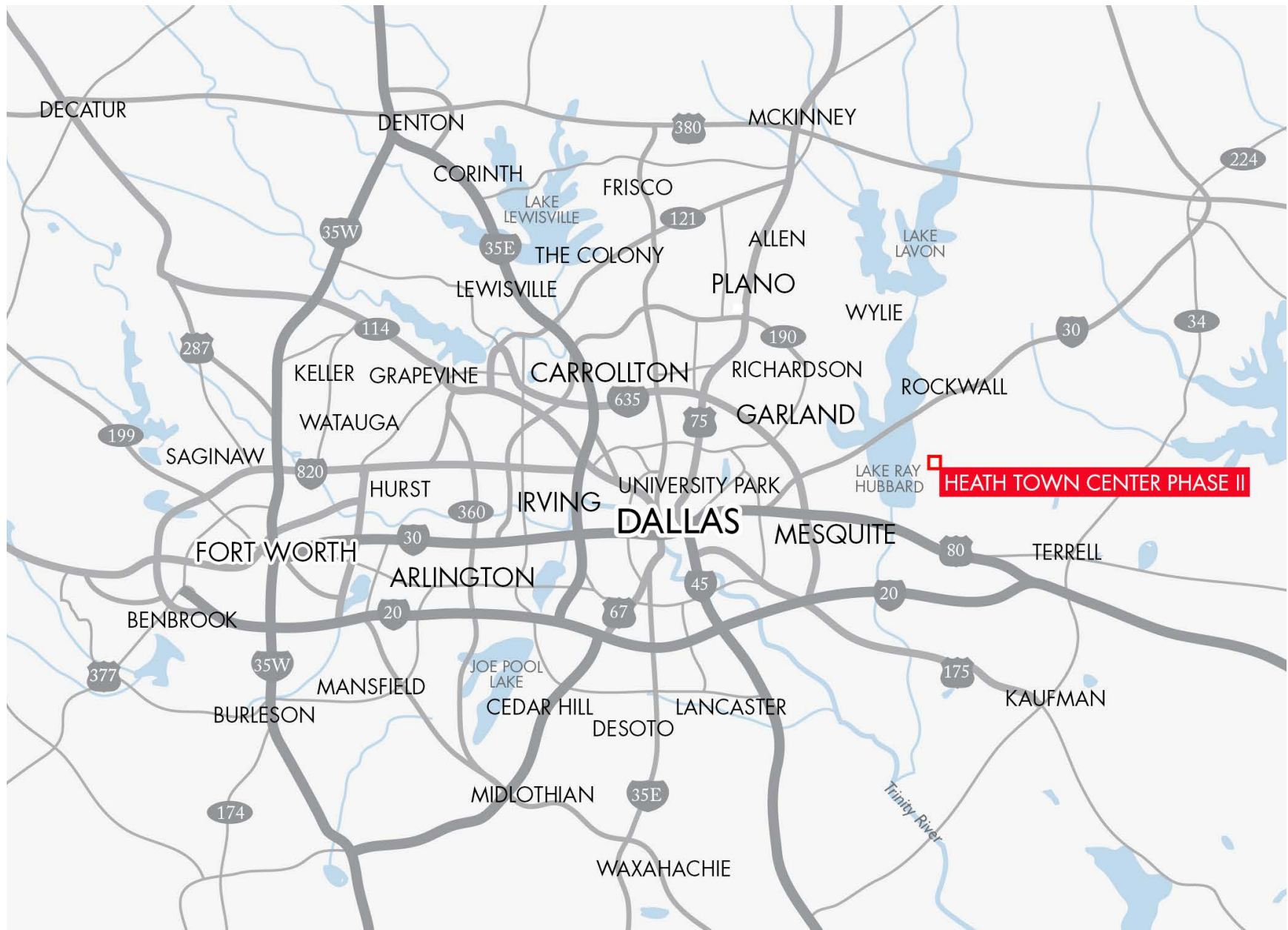
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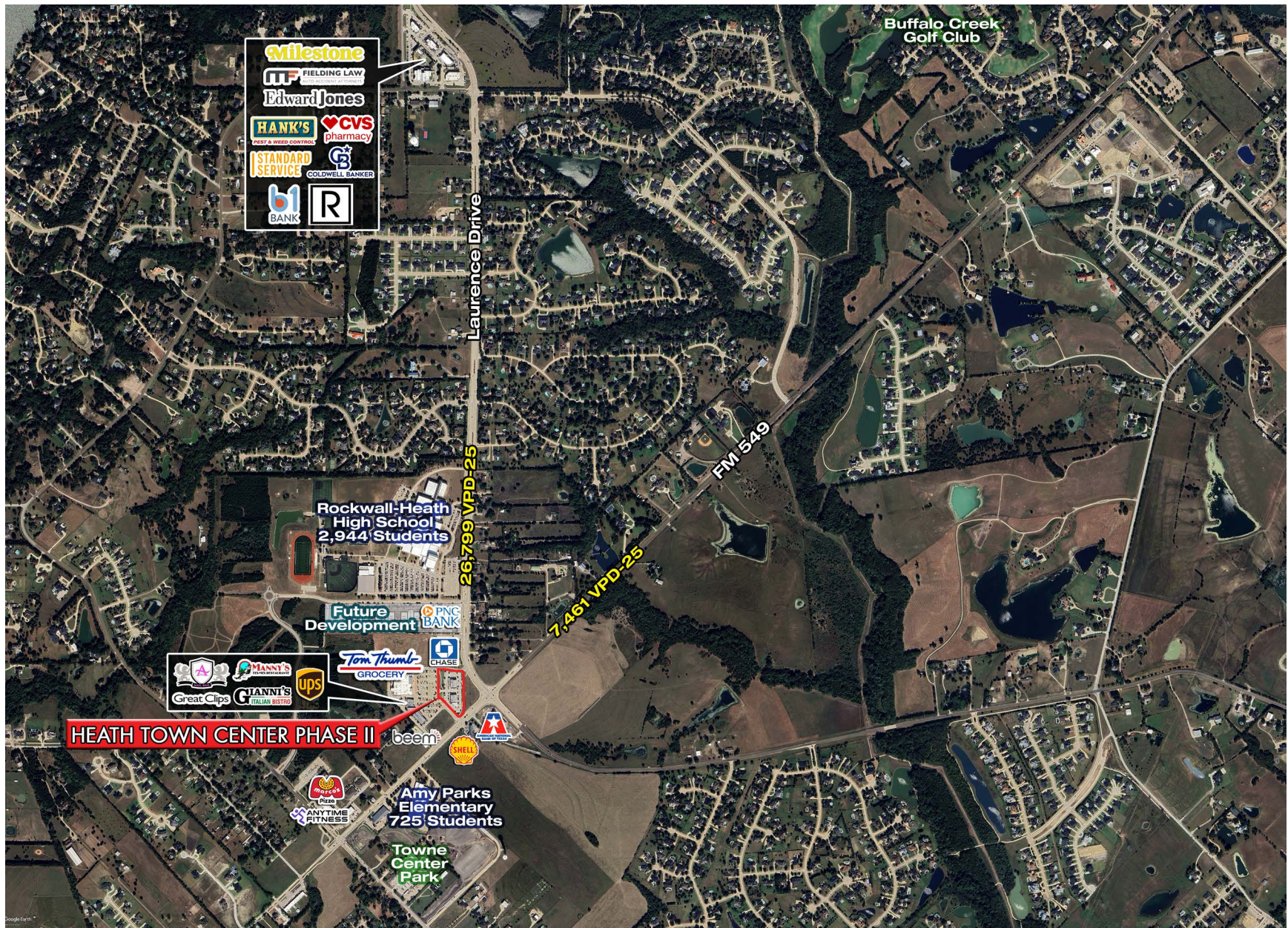
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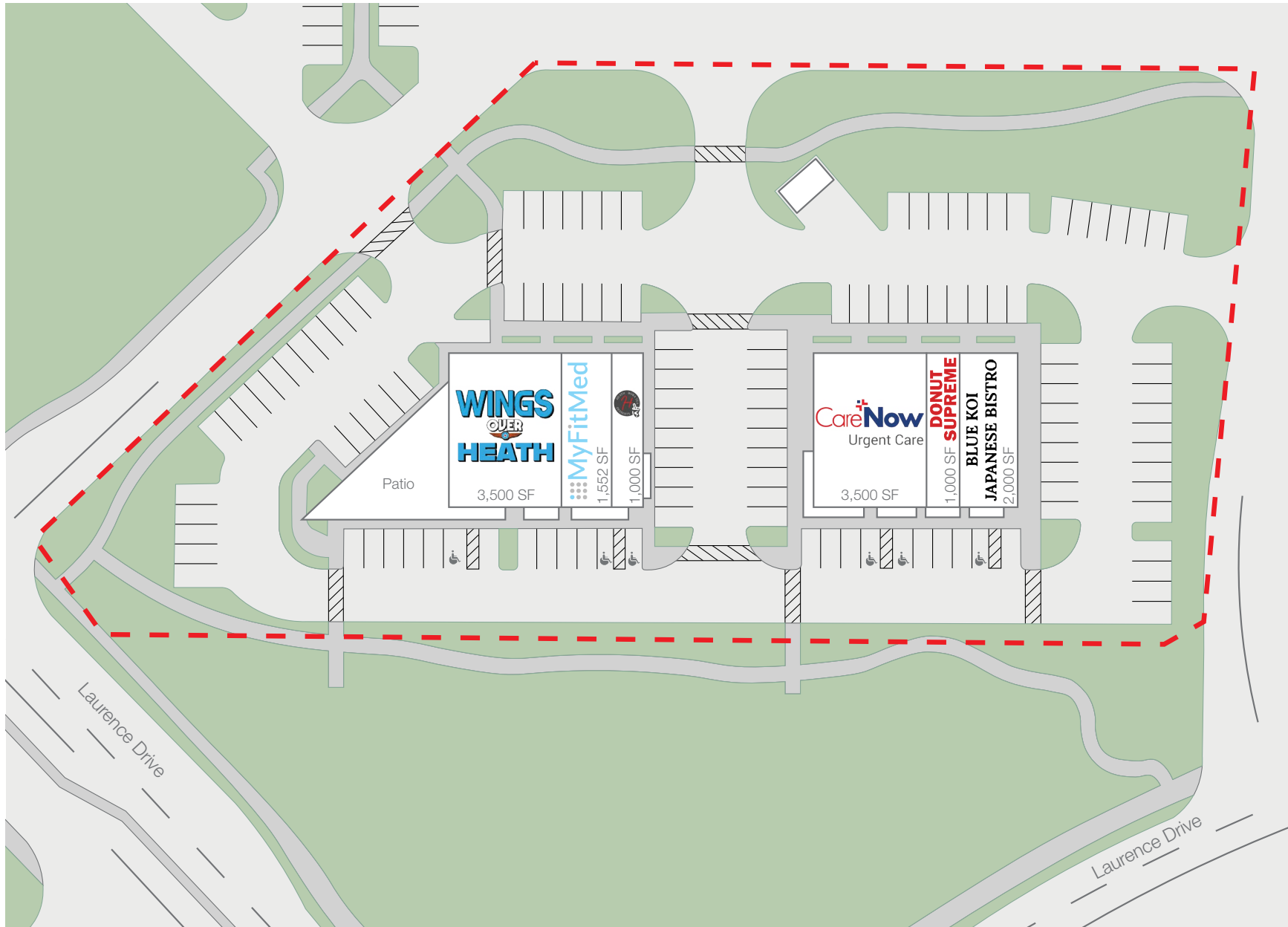


PROPERTY OVERVIEW



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SITE PLAN



ADJACENT TOM THUMB GROCERY STORE



ADJACENT CHASE BANK & TOM THUMB FUEL



ADJACENT RETAIL CENTER



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FINANCIAL OVERVIEW

FINANCIAL SUMMARY

Property	GLA	Percent Leased	Projected Year 1 NOI
Heath Town Center Phase II	13,927 SF	100%	\$541,080

The following information is provided to assist investors in their underwriting of the asset:

- a. Rent Roll b. Income & Expenses c. Pricing d. Tenant Profiles



FINANCIAL OVERVIEW

RENT ROLL

Suite	Tenant	SF	% of Property	Rent Term		Annual Base Rent		Escalations			Lease Type	Renewal Options & Comments
				Start	End	PSF	Total	Date	PSF	Total		
507	Wings Over Heath	3,500	25.13%	Apr-24	Mar-34	\$43.00	\$150,500	Apr-29	\$47.30	\$165,550	NNN	Two 5-year options at: 1st: \$52.03; 2nd: \$57.23
507 (Patio)	Wings Over Heath (Patio)	1,375	9.87%	Apr-24	Mar-34	\$8.00	\$11,000	Apr-29	\$8.80	\$12,100	NNN	Two 5-year options at: 1st: \$9.68; 2nd: \$10.65
511	MyFitMed	1,552	11.14%	Jul-23	Sep-28	\$40.00	\$62,080				NNN	Two 5-year options at: 1st: FMV; 2nd: FMV
515	Heath Boba Tea	1,000	7.18%	Jul-23	Jun-33	\$42.50	\$42,500	Jul-28	\$46.75	\$46,750	NNN	Two 5-year options at: 1st: FMV; 2nd: FMV
529	Care Now	3,500	25.13%	Oct-22	Sep-32	\$44.00	\$154,000	Oct-27	\$48.40	\$169,400	NNN	Two 5-year options at: 1st: FMV; 2nd: FMV
535	Donut Supreme	1,000	7.18%	May-23	Apr-33	\$41.00	\$41,000	May-28	\$45.10	\$45,100	NNN	Two 5-year options at: 1st: FMV; 2nd: FMV
537	Blue Koi Japanese Bistro	2,000	14.36%	May-23	Apr-33	\$40.00	\$80,000	May-28	\$44.00	\$88,000	NNN	Two 5-year options at: 1st: FMV; 2nd: FMV
TOTAL AREA:		13,927					\$541,080					
TOTAL LEASED AREA:		13,927	100.00%									
TOTAL VACANT AREA:		0	0.00%									

FINANCIAL OVERVIEW

INCOME/EXPENSE

EXPENSES

	CURRENT	PER SF
Real Estate Taxes	\$61,305	\$4.40
Insurance	\$22,844	\$1.64
Common Area Maintenance	\$53,149	\$3.82
Management Fee (3.00%)	\$20,351	\$1.46
TOTAL EXPENSES	\$157,649	\$11.32



INCOME & EXPENSES

	12-MONTH	PER SF
Base Rent		
Occupied Space	\$541,080	\$38.85
GROSS POTENTIAL RENT	\$541,080	\$38.85
Expense Reimbursements		
Real Estate Taxes	\$61,305	\$4.40
Insurance	\$22,844	\$1.64
Common Area Maintenance	\$53,149	\$3.82
Management Fee	\$20,351	\$1.46
Total Expense Reimbursements	\$157,649	\$11.32
GROSS POTENTIAL INCOME	\$698,729	\$50.17
EFFECTIVE GROSS INCOME	\$698,729	\$50.17
Expenses		
Real Estate Taxes	\$61,305	\$4.40
Insurance	\$22,844	\$1.64
Common Area Maintenance	\$53,149	\$3.82
Management Fee (3.00%)	\$20,351	\$1.46
Total Expenses	\$157,649	\$11.32
NET OPERATING INCOME	\$541,080	\$38.85

FINANCIAL OVERVIEW

PRICING

PRICE	\$8,520,000	GLA	13,927 SF
CAP RATE	6.35%	NOI	\$541,080
AVERAGE RENT PSF	\$38.85 PSF	AVG RETAIL LEASE EXPIRATION	October 2032



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FINANCIAL OVERVIEW

LEASE EXPIRATION SCHEDULE

Year	Tenant	Suite	Expiration Date	Square Feet	% of Property	Cumulative Square Feet	Cumulative Expiration %
2027+							
	Wings Over Heath	507	Mar-34	3,500	25.13%		
	Wings Over Heath (Patio)	507 (Patio)	Mar-34	1,375	9.87%		
	MyFitMed	511	Sep-28	1,552	11.14%		
	Heath Boba Tea	515	Jun-33	1,000	7.18%		
	CommunityMed Urgent Care	529	Sep-32	3,500	25.13%		
	Donut Supreme	535	Apr-33	1,000	7.18%		
	Blue Koi Japanese Bistro	537	Apr-33	2,000	14.36%		
	Total for Year Ending 2027+			13,927	100.00%	13,927	100.00%
	TOTAL LEASED SQUARE FOOTAGE:			13,927	100.00%		
	TOTAL VACANT SQUARE FOOTAGE:			0	0.00%		
	TOTAL SQUARE FEET:			13,927	100.00%		

FINANCIAL OVERVIEW

TENANT PROFILES



Wings Over Heath	
Square Feet:	3,500 SF
% of Building GLA:	25.13%
In-Place Rent PSF:	\$43.00
Lease Expiration:	March 2034
Company Website:	wingsoverheath.com

Wings Over USA is a casual, high-energy restaurant known for its crispy wings, bold sauces, and welcoming community vibe. With roots in Texas, the brand has grown while staying focused on great food and good times, offering not just wings but also burgers, tacos, shrimp, and other crowd-pleasing favorites. It's a go-to spot for game days, family meals, and laid-back gatherings with friends.



MyFitMed	
Square Feet:	1,552 SF
% of Building GLA:	11.14%
In-Place Rent PSF:	\$40.00
Lease Expiration:	September 2028
Company Website:	myfitmed.com

MyFitMed in Heath, TX is a wellness clinic focused on personalized health and medical services, including hormone optimization, testosterone therapy, and medically supervised weight loss. They also offer IV therapy and other wellness treatments designed to boost energy, performance, and overall well-being, helping

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Heath Boba Tea	
Square Feet:	1,000 SF
% of Building GLA:	7.18%
In-Place Rent PSF:	\$42.50
Lease Expiration:	June 2033
Company Website:	heathbobatea.com

Heath Boba Tea & Desserts is a cozy and highly rated bubble tea and dessert café in Heath, TX that's beloved for its tasty boba drinks and sweet treats. Reviewers praise its variety of milk teas, fruit slushes, matcha beverages, coffee drinks, and a fun selection of desserts like ice cream sandwiches and cake pops, plus popular snack items and appetizers.

FINANCIAL OVERVIEW

TENANT PROFILES



Care Now Urgent Care	
Square Feet:	3,500 SF
% of Building GLA:	25.13%
In-Place Rent PSF:	\$44.00
Lease Expiration:	September 2032
Company Website:	communitymed.com

Care Now is a walk-in urgent care provider that offered convenient, affordable medical care for non-emergency illnesses and injuries across North Texas. Their clinics provided services like urgent care visits, X-rays, lab testing, physicals, and vaccinations with extended hours and minimal wait times, making it easy for patients to get care when they needed it.



Donut Supreme	
Square Feet:	1,000 SF
% of Building GLA:	7.18%
In-Place Rent PSF:	\$41.00
Lease Expiration:	April 2033
Company Website:	donutsupreme.com

Donut Supreme is a local favorite in Heath, TX, known for its fresh, soft donuts and a variety of classic breakfast treats. Visitors love the friendly, welcoming atmosphere and quick service, making it a popular spot for morning coffee, pastries, and satisfying sweet cravings. With a range of flavors and baked goods, it's a go-to



Blue Koi Japanese Bistro	
Square Feet:	2,000 SF
% of Building GLA:	14.36%
In-Place Rent PSF:	\$40.00
Lease Expiration:	April 2033
Company Website:	bluekoifish.com

Blue Koi Japanese Bistro is a well-liked Japanese restaurant in Heath, TX, known for its blend of fresh sushi, hibachi-style grill, bento boxes, tempura, teriyaki, and other classic Japanese dishes. Guests frequently praise the fresh, flavorful rolls and attentive service in a cozy, casual setting that's great for family dinners or casual nights out.



DALLAS/ FORT WORTH AREA OVERVIEW

DALLAS, TX



The Dallas/Fort Worth MSA has a population base in excess of 7,570,000 residents and is largest MSA in the South and fourth in the nation. Also known as “DFW” and “the Metroplex”, the MSA is located in the plains of North Texas and encompasses 12 counties. As the nation’s fastest growing metropolitan area, DFW has led population growth over the last decade, adding 1,300,000 people, or a 25% increase. It is projected that by year 2030, the DFW population will increase by an additional 37% to over 9,200,000 people. The Dallas/Fort Worth area is 9,286 square miles making it larger in area than the states of Rhode Island and Connecticut combined. Dallas is the largest city in the MSA with a population over 1,300,000 residents. Suburban areas surround the MSA, most heavily to the north, with Arlington, Grand Prairie and Irving separating Dallas and Fort Worth by approximately 35 miles. Interstates 20, 30, 35 and 45 are its major arteries connecting it to all regions of the country. Superior growth along these routes has pushed the boundaries of the Dallas/Fort Worth MSA statistical area and allowed the metro area to be the preeminent distribution hub for the region. The region’s transportation network continues to evolve to meet the needs of a growing populace. Metro-area civic leaders are taking proactive steps to improve mobility. Additional tollway miles are planned, including the Trinity Parkway in Dallas and the

extension of the Airport Freeway in Tarrant County. Public transportation is gaining more popularity. DART is the fifth-largest light rail in the country. The DART light rail system is expected to extend further into suburban Dallas, and Collin and Tarrant counties. The business community has easy connections to major commercial centers around the globe via Dallas-Fort Worth International Airport, home to American Airlines, and Dallas Love Field, home to Southwest Airlines. Additionally, there are 13 smaller airports in the Metroplex and nine railroads. DFW is one of the few metro areas in the nation to host teams in all four major sports leagues. It is home to 14 four-year colleges and 15 two-year institutions. DFW continually ranks high as an affordable metro area, especially when compared to other large MSAs, with a cost of living index of 94.7. DFW has the 4th largest number of corporate headquarters in the nation and is home to 18 Fortune 500 companies, including 4 Global 500 companies, and 40 Fortune 1000 companies. The 18 Fortune 500 companies collectively brought in more than \$813 billion last year. DFW has capitalized on its central U.S. location, unparalleled transportation network, operating and living costs well below the national average, pro-business government, critical mass of existing corporate headquarters and offices, and favorable year-round climate.

TRADE AREA OVERVIEW

DEMOGRAPHICS

Variable	1 mile	3 miles	5 miles
2025 Total Population	2,556	23,488	71,171
2030 Total Population (Esri)	3,253	29,306	83,655
2010 Total Population (U.S. Census)	1,882	11,842	41,988
2000 Total Population (U.S. Census)	1,213	7,171	27,739
2000-2020 Population: Compound Annual Growth Rate (U.S. Census)	3.85%	4.68%	3.46%
2024-2029 Population: Compound Annual Growth Rate (Esri)	4.94%	4.53%	3.29%
2025 Total Daytime Population (Esri)	2,755	18,540	63,877
2025 Median Age (Esri)	45.1	39.5	37.4
2025 Total Households (Esri)	880	7,954	25,940
2030 Total Households (Esri)	1,147	10,135	30,894
2010 Total Households (U.S. Census)	584	4,140	15,179
2000 Total Households (U.S. Census)	371	2,533	10,308
2024-2029 Families: Compound Annual Growth Rate (Esri)	5.34%	4.77%	3.47%
2025 Average Household Income (Esri)	\$246,224	\$170,159	\$132,753
2025 Median Household Income (Esri)	\$193,769	\$132,853	\$97,816
2025 Per Capita Income (Esri)	\$84,664	\$58,558	\$48,274
2025 Population Age 25+: Less than 9th Grade (Esri) (%)	0%	1%	2%
2025 Population Age 25+: 9-12th Grade/No Diploma (Esri) (%)	1%	2%	3%
2025 Population Age 25+: High School Diploma (Esri) (%)	13%	14%	17%
2025 Population Age 25+: Some College/No Degree (Esri) (%)	20%	21%	22%
2025 Population Age 25+: Associate's Degree (Esri) (%)	7%	8%	9%
2025 Population Age 25+: Bachelor's Degree (Esri) (%)	38%	32%	27%
2025 Population Age 25+: Graduate/Professional Degree (Esri) (%)	18%	20%	16%
2025 Total (SIC01-99) Businesses	113	485	2,042
2025 Total (SIC01-99) Employees	949	3,706	22,063

INFORMATION ABOUT BROKERAGE SERVICES

Texas law requires all real estate license holders to give the following information about brokerage services to prospective buyers, tenants, sellers and landlords.

TYPES OF REAL ESTATE LICENSE HOLDERS:

- A **BROKER** is responsible for all brokerage activities, including acts performed by sales agents sponsored by the broker.
- A **SALES AGENT** must be sponsored by a broker and works with clients on behalf of the broker.

A BROKER'S MINIMUM DUTIES REQUIRED BY LAW (A client is the person or party that the broker represents):

- Put the interests of the client above all others, including the broker's own interests
- Inform the client of any material information about the property or transaction received by the broker;
- Answer the client's questions and present any offer to or counter-offer from the client; and
- Treat all parties to a real estate transaction honestly and fairly

A LICENSE HOLDER CAN REPRESENT A PARTY IN A REAL ESTATE TRANSACTION:

AS AGENT FOR OWNER (SELLER/LANDLORD): The broker becomes the property owner's agent through an agreement with the owner, usually in a written listing to sell or property management agreement. An owner's agent must perform the broker's minimum duties above and must inform the owner of any material information about the property or transaction known by the agent, including information disclosed to the agent or subagent by the buyer or buyer's agent. An owner's agent fees are not set by law and are fully negotiable.

AS AGENT FOR BUYER/TENANT: The broker becomes the buyer/tenant's agent by agreeing to represent the buyer, usually through a written representation agreement. A buyer's agent must perform the broker's minimum duties above and must inform the buyer of any material information about the property or transaction known by the agent, including information disclosed to the agent by the seller or seller's agent. A buyer/tenant's agent fees are not set by law and are fully negotiable.

AS AGENT FOR BOTH - INTERMEDIARY: To act as an intermediary between the parties the broker must first obtain the written agreement of each party to the transaction. The written agreement must state who will pay the broker and, in conspicuous bold or underlined print, set forth the broker's obligations as an intermediary. A broker who acts as an intermediary:

- Must treat all parties to the transaction impartially and fairly;
- May, with the parties' written consent, appoint a different license holder associated with the broker to each party (owner and buyer) to communicate with, provide opinions and advice to, and carry out the instructions of each party to the transaction
- Must not, unless specifically authorized in writing to do so by the party, disclose:
 - that the owner will accept a price less than the written asking price;
 - that the buyer/tenant will pay a price greater than the price submitted in a written offer; and
 - any confidential information or any other information that a party specifically instructs the broker in writing not to disclose, unless required to do so by law.

AS SUBAGENT: A license holder acts as a subagent when aiding a buyer in a transaction without an agreement to represent the buyer. A subagent can assist the buyer but does not represent the buyer and must place the interests of the owner first.

TO AVOID DISPUTES, ALL AGREEMENTS BETWEEN YOU AND A BROKER SHOULD BE IN WRITING AND CLEARLY ESTABLISH:

- The broker's duties and responsibilities to you, and your obligations under the representation agreement.
- Who will pay the broker for services provided to you, when payment will be made and how the payment will be calculated.

LICENSE HOLDER CONTACT INFORMATION: This notice is being provided for informational purposes. It does not create an obligation for you to use the broker's services. Please acknowledge receipt of this notice below and retain a copy for your records.

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