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DOLLAR TREE

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EXCLUSIVELY LISTED BY:

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INVESTMENT SUMMARY

| | |
|-------------------|-------------|
| List Price: | \$3,013,500 |
| Current NOI: | \$218,496 |
| Initial Cap Rate: | 7.25% |
| Land Acreage: | 0.92 |
| Year Built | 2025 |
| Building Size: | 9,977 SF |
| Price PSF: | \$302.04 |
| Lease Type: | NN |
| Lease Term: | 10 Years |
| Average CAP Rate: | 6.75% |

INVESTMENT OFFERING

Fortis Net Lease is pleased to present a prime investment opportunity at 663 Brook Forest Ave in Shorewood, IL. This impressive 9,977 SF free-standing building, zoned B-3, offers a lucrative chance to secure a 100% occupied property in a sought-after location. Ideally situated in the thriving Shorewood area, this establishment is poised to deliver strong returns for investors seeking a prized retail asset.

This Dollar Tree is one of the best performing locations in the seller's development career. He has built more than 400 Dollar Tree/Family Dollar properties over the past several decades.



PRICE \$3,013,500



CAP RATE 7.25%



LEASE TYPE NN



TERM REMAINING 10 Years

INVESTMENT HIGHLIGHTS

- 2025 construction with warranties
- Adjacent to Aldi & Home Depot
- Excellent residual value in major retail zone
- 70,000 people live within 3 miles
- Average household income exceeds \$117,000
- DLTR stock has risen nearly 20% over last 6 months
- Ideal market for DLTR's business model
- Extremely High Sales Performance Location

FINANCIAL SUMMARY

| INCOME | | PER SF |
|----------------------|--------------|---------|
| Gross Income | - | - |
| EXPENSE | | PER SF |
| Gross Expenses | - | - |
| NET OPERATING INCOME | \$218,496.30 | \$21.90 |

PROPERTY SUMMARY

| | |
|----------------|------------|
| Year Built: | 2025 |
| Lot Size: | 0.92 Acres |
| Building Size: | 9,977 SF |
| Zoning: | B-3 |

LEASE SUMMARY

| | |
|------------------------|-----------------------------------------------------------------------|
| Tenant: | Dollar Tree |
| Lease Type: | NN |
| Primary Lease Term: | 10 Years |
| Annual Rent: | \$218,496.30 |
| Rent PSF: | \$21.90 |
| Lease Start Date: | May 29, 2025 |
| Lease Expiration Date: | July 30, 2035 |
| Rent Bumps: | \$0.50 PSF at each option |
| Renewal Options: | Three 5-Year Options |
| Tenant Website: | https://www.dollartree.com/ |



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| TENANT NAME | TERM (YEARS) | LEASE START | LEASE END | ANNUAL RENT | MONTHLY RENT | INCREASES | RENT PER SF/YR |
|----------------|------------------|-----------------|---------------|----------------|-----------------|------------|-------------------|
| Dollar Tree | Base 1-10 | May 29, 2025 | July 30, 2035 | \$218,496.30 | \$18,208.02 | - | \$21.90 |
| Dollar Tree | Option 1 (11-15) | August 01, 2035 | July 30, 2040 | \$223,484.80 | \$18,623.73 | \$0.50 PSF | \$22.40 |
| Dollar Tree | Option 2 (16-20) | August 01, 2040 | July 30, 2045 | \$228,473.30 | \$19,039.44 | \$0.50 PSF | \$22.90 |
| Dollar Tree | Option 3 (21-25) | August 01, 2045 | July 30, 2050 | \$233,461.80 | \$19,455.15 | \$0.50 PSF | \$23.40 |



TENANT BACKGROUND

Dollar Tree, Inc. operates discount retail stores in the United States and Canada. The company operates in two segments, Dollar Tree and Family Dollar. The Dollar Tree segment offers merchandise at the fixed price of \$1.25. It provides consumable merchandise, including candy and food, and health and beauty care products, as well as everyday consumables, such as household paper and chemicals, and frozen and refrigerated food; various merchandise.

This segment operates under the Dollar Tree, Dollar Tree Canada, Deals, and Dollar Tree Deals brands, as well as 10 distribution centers in the United States and 2 in Canada, and a store support center in Chesapeake, Virginia. A Fortune 500 Company, Dollar Tree is headquartered in Chesapeake, Virginia and was founded in 1953. The name of the company Only \$1.00 was changed to Dollar Tree Stores in 1993 and, shortly thereafter, in 1995, the company went public with a market value of \$225 million. Today, Dollar Tree is a \$28+ billion dollar company and a premier operator in its industry.

OVERVIEW

Company: Dollar Tree

Founded: 1986

Total Revenue: \$30.60 Billion

Net Income: \$1.89 Billion

Headquarters: Chesapeake, Virginia

Website: www.DollarTree.com

TENANT HIGHLIGHTS

- \$31.28+ Billion Market Capital in 2022
- Same Store Sales Increases 9.0% in 2022
- Ranked #134 on Fortune 500 in 2020
- Over 16,000 Locations in the USA
- Boasts a staggering TTM revenue exceeding \$28 billion

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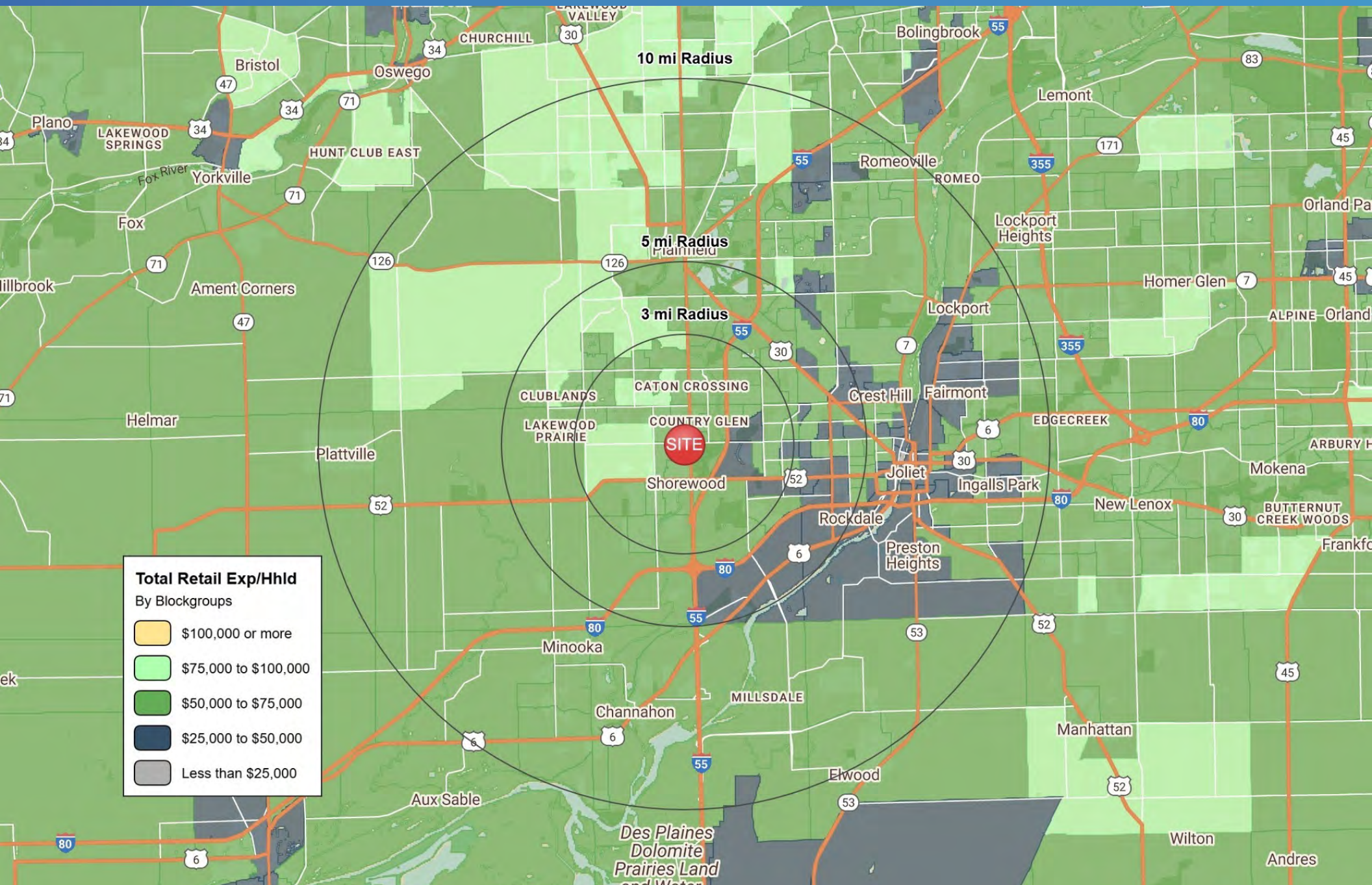
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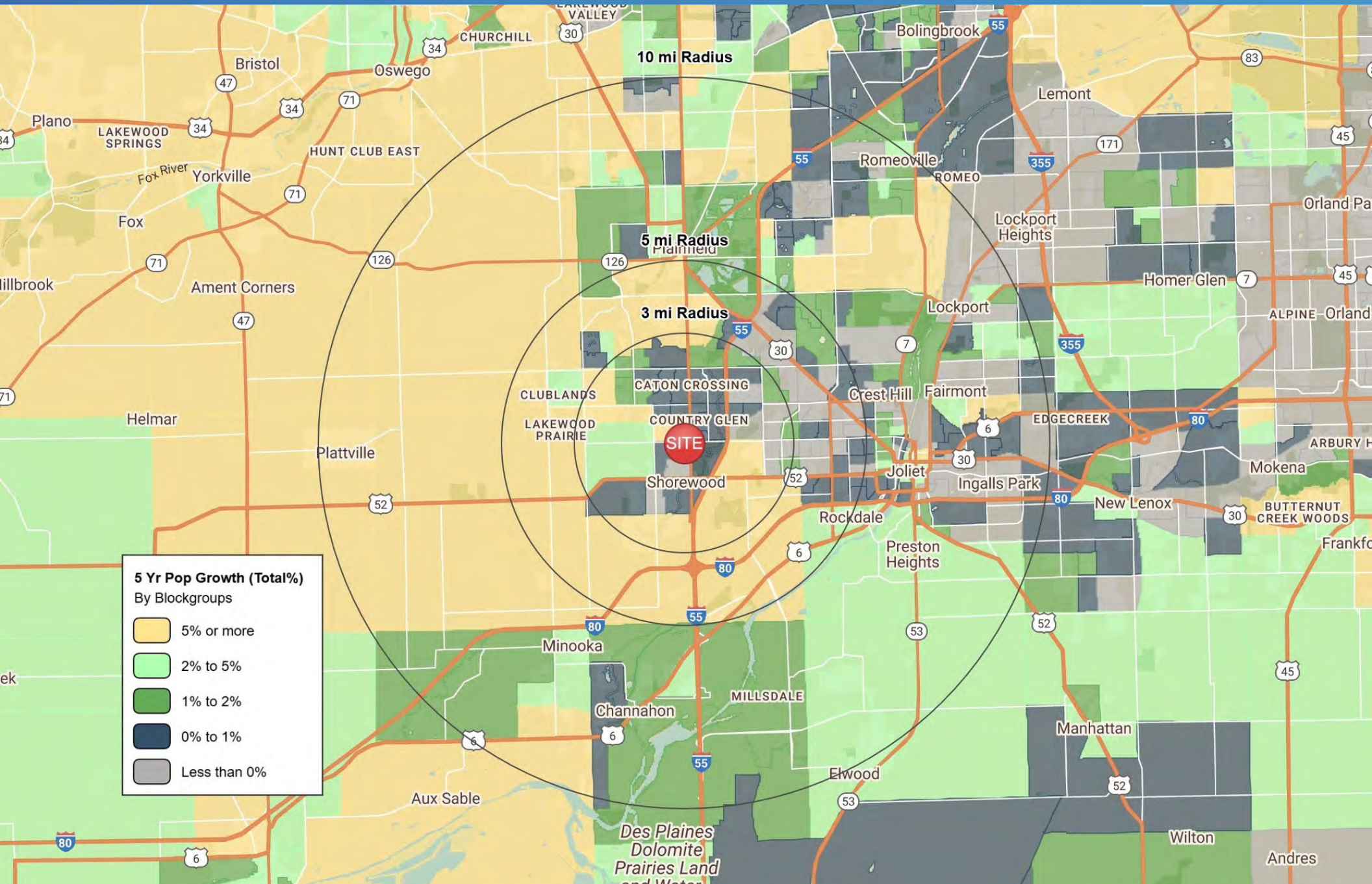


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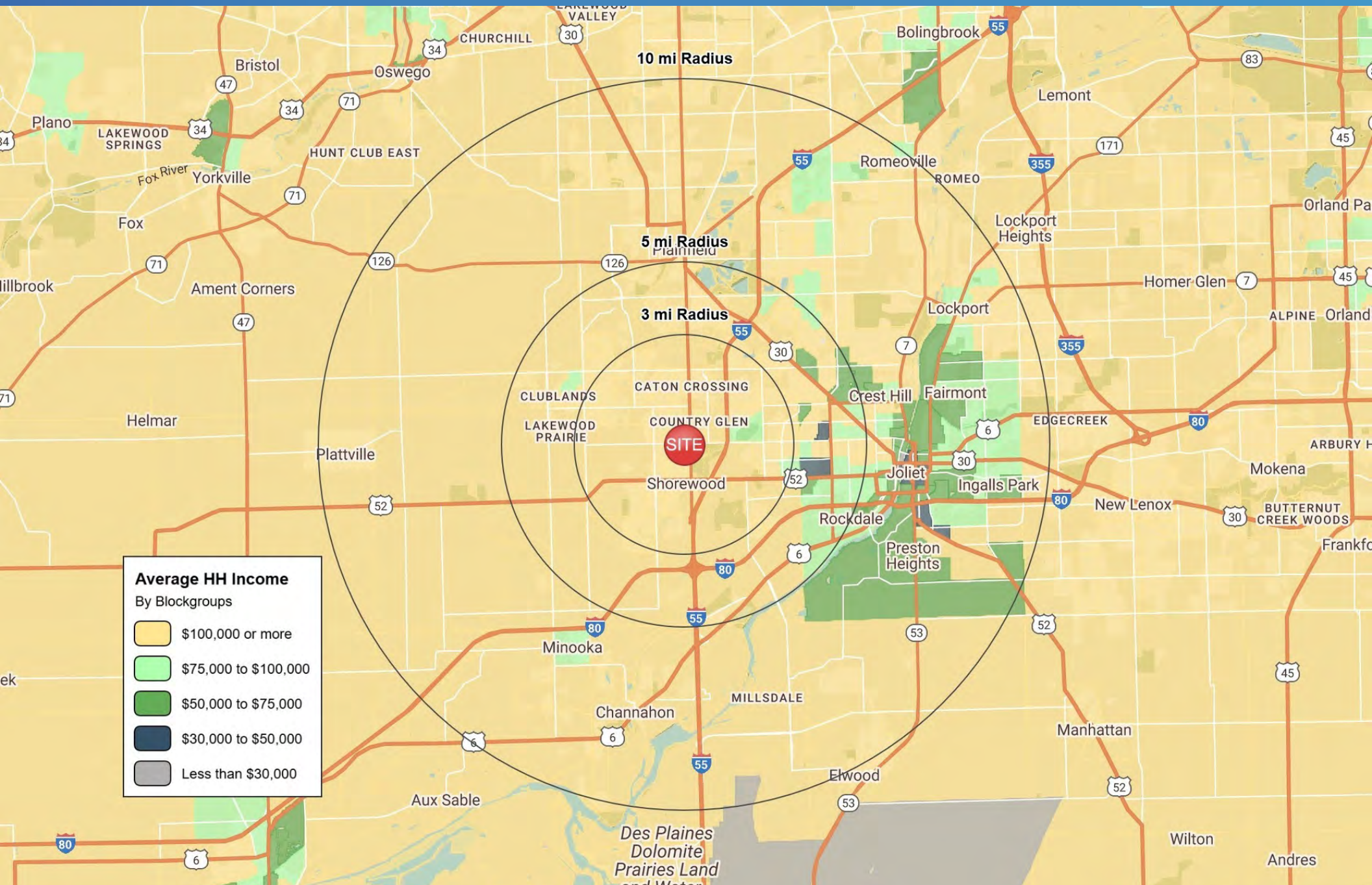
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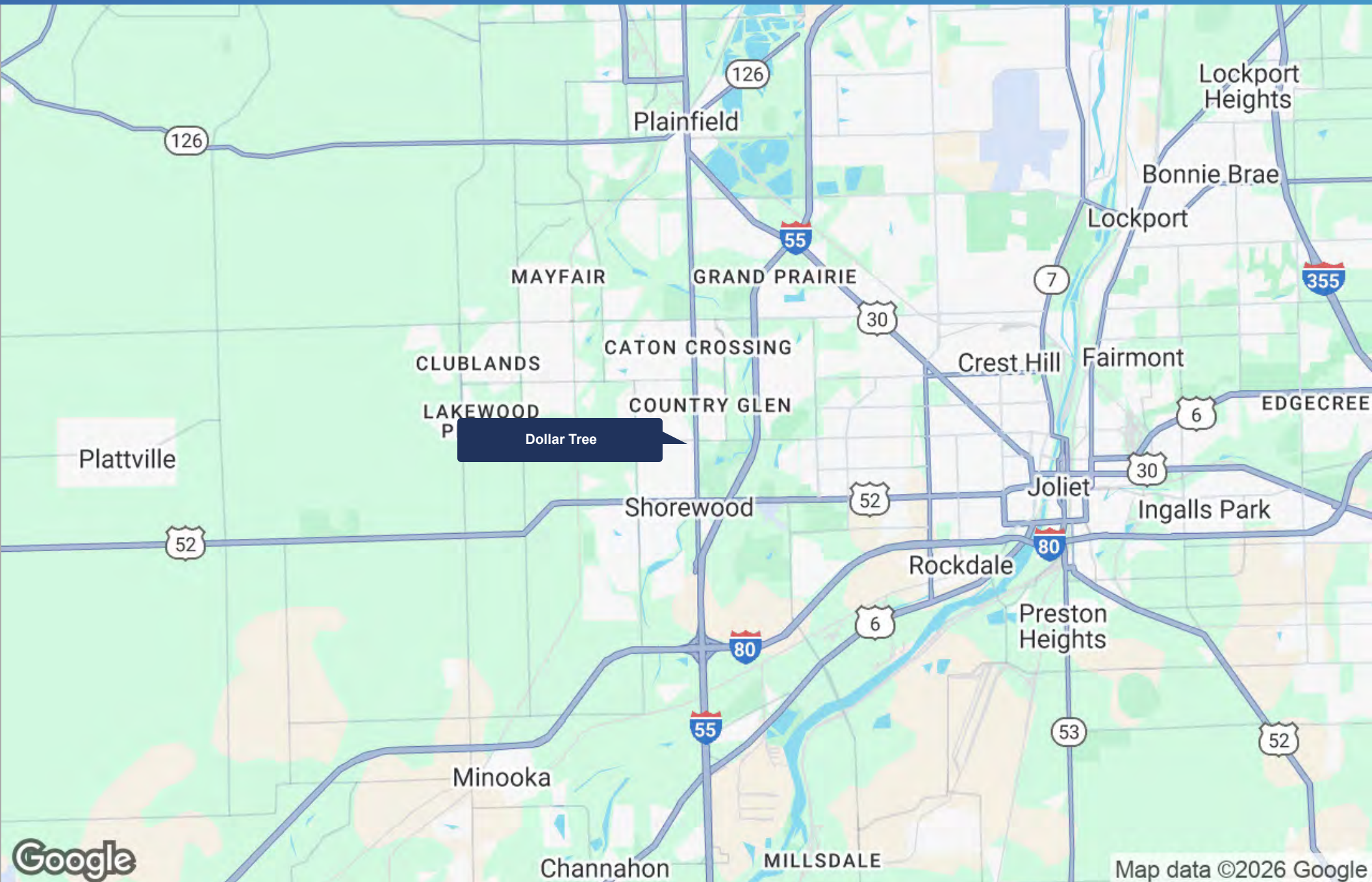
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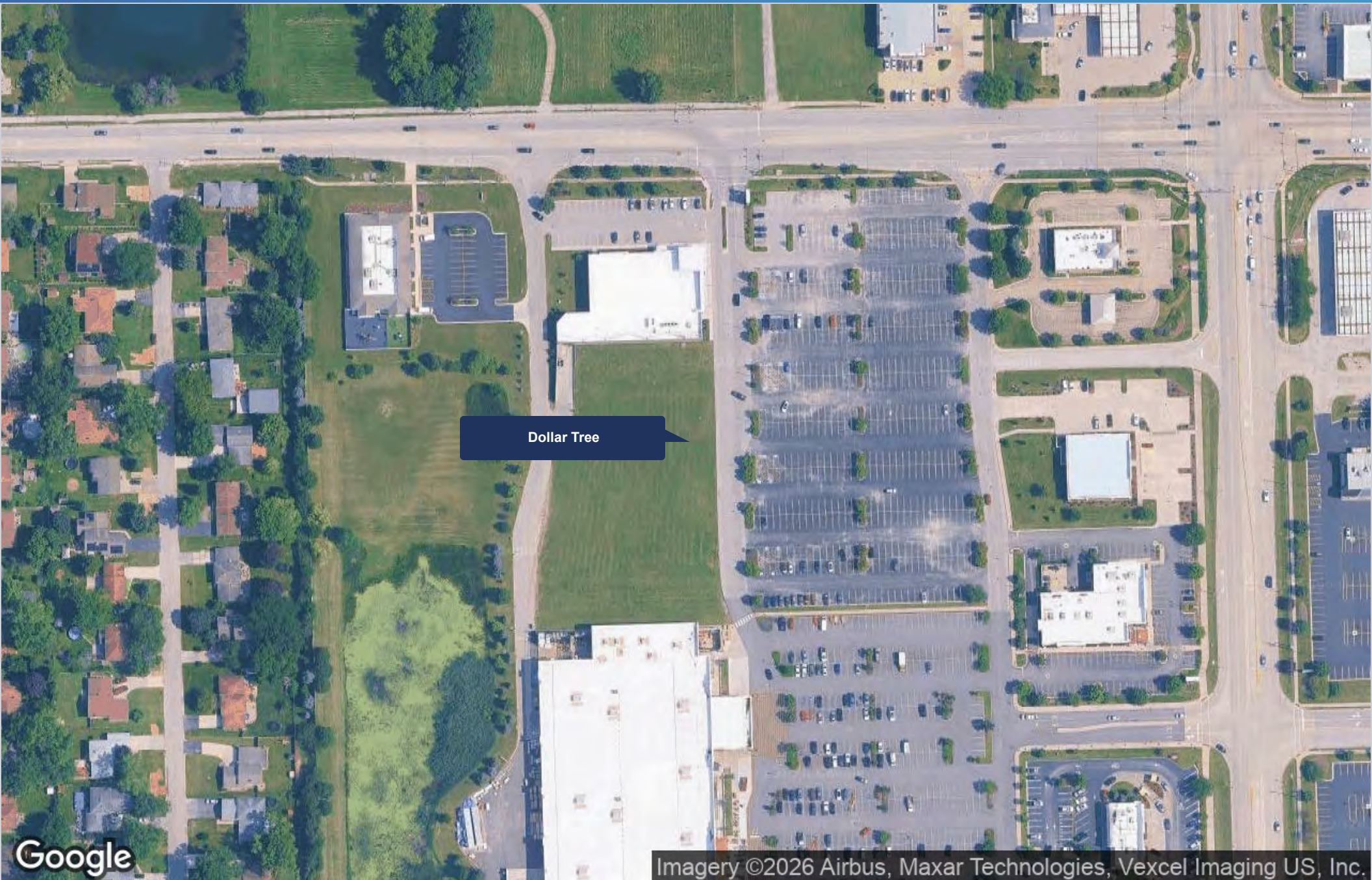
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Shorewood, Illinois, is a suburban village located in Will County, about 40 miles southwest of Chicago. Originally a small resort town along the DuPage River, Shorewood has evolved into a thriving residential community with a mix of suburban charm and modern conveniences. The village is known for its well-planned neighborhoods, excellent schools, and an abundance of parks and recreational areas, making it an attractive destination for families and professionals. With easy access to major highways like I-55 and I-80, residents enjoy a balance of peaceful living with proximity to the greater Chicagoland area.

In addition to its residential appeal, Shorewood offers a variety of shopping, dining, and entertainment options. The village has seen steady growth in commercial development, with local businesses and national retailers catering to the needs of the community. Parks such as Hammel Woods and Shorewood Park provide outdoor activities, including hiking, fishing, and kayaking along the river. Community events, such as the annual Crossroads Festival, foster a strong sense of local pride and engagement. With its mix of small-town feel and modern amenities, Shorewood continues to be a desirable place to live and work in the region.

| POPULATION | 3 MILES | 5 MILES | 10 MILES |
|-----------------------|-----------|-----------|-----------|
| Total Population 2024 | 68,458 | 151,579 | 373,158 |
| Total Population 2029 | 68,401 | 152,686 | 375,635 |
| Median Age | 39.2 | 38.8 | 38.1 |
| # Of Persons Per HH | 2.9 | 2.8 | 2.8 |
| HOUSEHOLDS & INCOME | 3 MILES | 5 MILES | 10 MILES |
| Total Households | 23,321 | 53,055 | 126,956 |
| Average HH Income | \$119,332 | \$108,116 | \$106,576 |
| Median House Value | \$259,577 | \$247,966 | \$246,835 |
| Consumer Spending | \$895.9M | \$1.9B | \$4.5B |





TOTAL SALES VOLUME

\$10B+

PROPERTIES SOLD

4,500+

BROKER & BUYER REACH

400K+

STATES SOLD IN

46

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