



Synergetic
INVESTMENT GROUP



SIG Wealth

Fund I & Fund B

Legal Stuff

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Introduction

SIG Wealth Fund I, LLC is a new type of wealth fund where investors can build their own custom portfolio inside the fund by investing in shares of real estate properties and/or other investment opportunities.



Multifamily



Self Storage



Mobile Home
Parks



Assisted Living
Homes



Mortgage Notes



Bitcoin Mining



Hard Money Loans



Medical Offices

Fund Management Team

Jeff Greenberg, MBA is the CEO Synergetic Investment Group, LLC (SIG). For the past 13 years he has managed all aspects of commercial real estate ownership including acquisitions, operations, value add, dispositions, and investor relations.

- SIG currently focus' on helping high net worth individuals, passively invest with best-in-class Commercial Deal Syndicators and invest in Commercial Real Estate and other alternative investments.
- SIG controlled a multi-property portfolio valued over \$25 million consisting of Multifamily and Student Housing properties.
- Jeff's previous experience includes forty years of experience in management, staff supervision, development and training. He has proposed, implemented, and supervised multimillion dollar budgets for government agencies, as well as private and public organizations.



Investor Benefits

Tax Benefits & Transparency

Passive income, appreciation & depreciation passed thru. Track earnings and performance on every deal.

Liquidity

Option to reinvest or withdraw earnings and capital as deals exit

Leveraged Terms Pre-Negotiated

Net Returns typically better than direct investments due to Leveraged Terms.

Deal Research, & Selection

SIG Wealth Fund B evaluates & co-invests in the best deals

Customization

Investors customize portfolio to align with their investment goals

Diversification

Invest in different states, time horizons, deal sponsors, asset classes, asset types, and minimum investment requirements



Offering through SEC Reg. D 506(b) filing (Fund B); or SEC Reg. D 506(c) filing (Fund I); Investment Company Act Section 3 (c)(1) exemption; Accredited and Sophisticated Investors only.

How the Fund Works

● **Fund researches** deal sponsors and opportunities

● **Fund negotiates** leveraged terms for fund



Multifamily



Self Storage



Mobile Home
Parks



Assisted Living
Homes



Mortgage Notes



Hard Money Loans



● **Fund tracks**
shares and pro-
rata earnings and
appreciation

● **Investors can**
re-invest earnings &
returned principal into
new opportunities

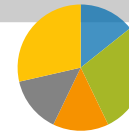


Bitcoin Mining



Medical Offices

● **Investors choose** which deals to invest
in as new opportunities are offered



Investor A

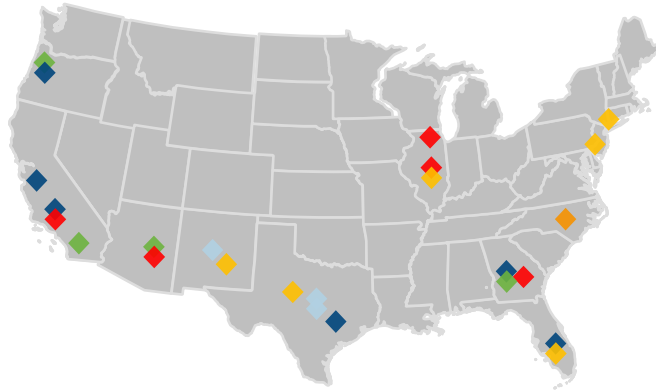


Investor B

● **Investors can**
withdraw capital after
distributions or return of
capital.

Investor Portfolio Sample

Invest in
multiple
markets



Invest for your
time horizon



Diversify across
opportunity
types



Investment	Capital Invested	State	Investment Type	Term
400 Unit Multifamily	\$50,000	TX	Equity	3 Years
Hard Money Loan-SFH	\$5,000	NY	Residential Debt	12 Months
10,000 sq ft Medical Office	\$75,000	FL	Equity	3-5 Years
5 SFH Notes	\$1000	TX	Residential Debt	18 Months
150 Space Mobile Home Park	\$100,000	WA	Equity	3-5 Years
Bitcoin Mining	\$1000	IL	Equity	2-5 Years
Assisted Living	\$250,000	NC	Equity	4-5 Years
Boston Student Housing	\$50,000	MA	Equity	5+ Years

Tax Simplification

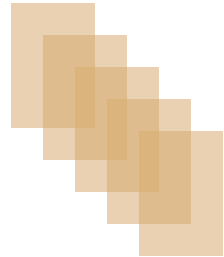
Debt Investments

1099-INTs from
each sponsor



Equity Investments

K-1 for each equity
investment



SIG Wealth Fund I
Tax
Consolidation



Consolidated K-1
for each investor

- For larger investors, taxes get complicated when investing across multiple deals separately
- SIG Wealth Fund B generates a consolidated K-1 for each investor
- Consolidated K-1 provides significant tax preparation cost & time savings
- Management fees paid to SIG Wealth Fund B and partner pro-rata share of LP expenses are considered partnership business expenses (line 1 of K-1)
- Passive gains/losses across equity deals can offset each other



SIG Wealth Fund B

[Set up an appointment](#) to learn how we can help you reach your investment goals and about current opportunities.

View the fund offerings.

[Fund I \(accredited only\)](#)

[Fund B \(accredited and sophisticated\)](#)

Thank you for allowing us to help you expand your wealth.



Jeff Greenberg, MBA

Chief Executive Officer

Equity Manager & Investment Guardian

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 Book a Call