



Jonathan Lee

Principal/Managing Director

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Jonathan Lee sources structured capital for both high net-worth and institutional clients. A former developer, Mr. Lee leverages his experience in ground up development to customize a client plan that manages risk profiles and maximizes returns. He utilizes an extensive network of debt, life insurance, CMBS, Fannie/Freddie and equity relationships to achieve his client's goals.

Mr. Lee specializes in ground up construction, perm and bridge financing. He has arranged debt, pref equity and JV equity structures totaling \$3.5 Billion+ in his career. His expertise includes underwriting and structuring commercial real estate investments, negotiating transactions and term sheets, financial modeling, market research, and evaluating business plans through the stages of an investment cycle.

Mr. Lee is married with two children. He is a community leader at his church, and is involved in several non-profits including the Union Rescue Mission and the Ronald McDonald House. A Southern California native, he graduated from UCLA in 2001 and currently lives in the Westchester neighborhood of Los Angeles.

Professional and Academic Affiliations:

- *California First Bank, Board Member/Credit Officer (Current)*
- *Union Rescue Mission, Board Member/Philanthropy Chair (Current)*
- *YPO Member, Chapter Learning Officer (2020-21)*
- *Member of UCLA REAG, MBA, and ICSC*
- *Cornerstone Church West Los Angeles*