



# Opportunity Zone Fund Directory

A directory of multi-project Opportunity Zone funding opportunities compiled by NCSHA.

To be added to the directory, [please complete this form](#).

Questions? Contact James Tassos, NCSHA's Deputy Director of Tax Policy and Strategic Initiatives, at [jtassos@ncsha.org](mailto:jtassos@ncsha.org).

*Last Updated: December 3, 2018*



The information included in this directory is for general informational purposes only. The inclusion of an entity is not to be taken as an endorsement by NCSHA.

The information in this directory is provided "as is" without warranty of any kind. NCSHA does not accept responsibility or liability for the accuracy, content, completeness, or reliability of the information contained herein.

NCSHA will not be liable for any loss or damage that may arise as a result of the use of the information contained herein. This directory provides direct links to websites owned by other parties. The content of such sites is not within NCSHA's control; NCSHA cannot take responsibility for the information or content thereon.

NCSHA will continue to update this document as it becomes aware of new funds or changes to the information below.

## Table of Contents

1787 Capital Opportunity Zone Fund.....	3
3LB Equities Opportunity Zone Fund .....	4
Access Ventures Opportunity Fund .....	5
Alpha Opportunity Zone Fund I .....	6
Arela Opportunity Fund .....	7
Bay Area Opportunity Fund .....	8
B'KOZ Fund.....	9
Caliber Tax Advantaged Opportunity Zone Fund, LP .....	10
Community Outcome Fund.....	11
ConnectUP! Integrated Capital Fund .....	13
Cresset-Diversified QOZ Fund .....	14
D.R.E.A.M. Fund .....	16
Detroit Opportunity Fund .....	17
Emergent Communities Fund .....	18
EquityMultiple Opportunity Zone Fund.....	19
Foundation Capital Opportunity Zone Fund .....	20
Fundrise Opportunity Fund.....	21
Garnett Station Partners Opportunity Fund .....	22
Golden Door Partners Opportunity Zone Fund .....	23
Gravitas Fund .....	24
Grubb Qualified Opportunity Fund - 2019.....	25
Heritage Equity Partners Urban Opportunity Zone .....	26
King Tide Capital Opportunity Zone Fund.....	27
LIHTC Development Group LLC.....	28
Local Grown Salads i95 Opportunity Zone (LGS I95 OZF) .....	29
Loyalty Opportunity Fund .....	31
Miami Opportunity Fund .....	32
Normandy Opportunity Zone Fund LLP .....	33
North Country Opportunity Zone Fund L.P.....	34
Obsidian Opportunity Fund .....	36
Opportunity Development Group Fund I.....	37

OPZ Capital Opportunity Zone Fund ..... 38

Origin QOZ Fund..... 39

Orlando Opportunity Zone Fund..... 40

Peachtree Hotel Opportunity Zone Tax Advantage Fund, LP ..... 41

PEEK Opportunity Fund I..... 42

Rural COZ ..... 43

RXR Realty OZ Fund..... 44

Savage Grant Opportunity Fund ..... 45

Saxum Opportunity Zone Fund ..... 46

Shorewood Opportunity Fund ..... 47

Sixty West Access Opportunity Fund ..... 48

SkyBridge-EJF Opportunity Zone REIT..... 49

Somerset Partners OZ Fund ..... 51

Sound West OZ Fund I..... 52

Strategic Opportunity Zone Fund ..... 53

Tampa Qualified Opportunity Zone Fund ..... 54

Tech Transfer Fund I, Inc..... 55

The Pearl Fund ..... 56

Treetop Opportunity Zone Funds I, II, & III ..... 57

Veterans Investing ..... 58

Virtua Opportunity Zone Fund..... 59

Young Latin ..... 60

---

## 1787 Capital Opportunity Zone Fund

---

Fund Manager/Organizer 1787 Capital

---

Fund Size \$50 Million

---

Website <https://www.linkedin.com/company/1787-capital/>

---

Investment Focus Commercial real estate, Community revitalization, Economic development, Hospitality development, Infrastructure investment, Mixed-use development, Multifamily residential, Renewable energy investment, Small business development, Workforce housing, Other

---

If Other, Please Specify Public-Private Partnerships, Transit Oriented Development,

---

Geographic Focus Alabama, Delaware, District of Columbia, Florida, Georgia, Maryland, Mississippi, Missouri, New Jersey, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Virginia

---

Details if Regional/Local/Other

---

Additional Fund Details Target projects are sized at \$60-100M total project. Equity check aimed at about 20% of that amount.

---

Organizational Details Core management team has decades of public-sector and professional private-sector professional experience, including in senior public policy roles in tax policy, public-private partnerships, real estate development and transactional legal work. Our team has been in the trenches in negotiating with elected officials on major redevelopment of downtown areas, and in decisions associated with transit oriented development.

---

Contact Chris Jeter

---

Phone 646-283-7295

---

Email [chris@1787capital.com](mailto:chris@1787capital.com)

---

---

### 3LB Equities Opportunity Zone Fund

---

Fund Manager/Organizer                      3LB Equities

---

Fund Size    \$150 Million

---

Website    <https://3lbequities.com/opportunity-fund>

---

Investment Focus                                  Affordable housing, Community revitalization, Mixed-use development, Multifamily residential, Student housing

---

If Other, Please Specify

---

Geographic Focus                                  Texas

---

Details if Regional/Local/Other

---

Additional Fund Details                          3LB Equities' Opportunity Zone Fund focuses on the acquisition of existing and development of new multifamily projects within the state of Texas.

---

Organizational Details

---

Contact    Adam Smith

---

Phone    817-406-0075

---

Email    [ASmith@3lbequities.com](mailto:ASmith@3lbequities.com)

---

---

## Access Ventures Opportunity Fund

---

Fund Manager/Organizer                  Access Ventures

---

Fund Size                                        \$100 Million

---

Website                                         <https://accessventures.org/blog/exploring-an-opportunity-zone-fund/>

---

Investment Focus                              Small business development

---

If Other, Please Specify

---

Geographic Focus                              Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details                      Access Ventures is an impact investment firm that builds more inclusive economies through mission-aligned investments that enable communities to flourish. Investment partners include Collaboration Capital, TriLink Global, Village Capital, kiva, and ethic

---

Organizational Details

---

Contact    Ross Baird

---

Phone    404-281-1254

---

Email     [ross@accessventures.org](mailto:ross@accessventures.org)

---

---

## Alpha Opportunity Zone Fund I

---

Fund Manager/Organizer Alpha Capital Partners

---

Fund Size \$250 Million

---

Website [www.alphacapitalpartners.com](http://www.alphacapitalpartners.com)

---

Investment Focus Affordable housing, Multifamily residential, Student housing

---

If Other, Please Specify

---

Geographic Focus Alabama, Georgia, Illinois, Louisiana, Michigan, Mississippi, North Carolina, Ohio, Oklahoma, Pennsylvania, South Carolina, Tennessee, Texas, Wisconsin

---

Details if Regional/Local/Other

---

Additional Fund Details Alpha Opportunity Zone Fund I will initially focus on student housing in qualified opportunity zones in Pittsburgh and Houston alongside Alpha Capital's already strong, secondary market footprint in the South, Southeast, and Midwest.

---

Organizational Details Alpha Capital Partners is a real estate investment group with a focus on middle market multifamily, student housing and medical office investments. Through the innovative Alpha Capital Partners process we deliver yield-focused, high-margin, market-leading, risk-adjusted returns. We operate our business under the guiding principles of stewardship, innovation, integrity, entrepreneurship and social responsibility.

---

Contact Alyson McCaffrey

---

Phone 832-789-1794

---

Email [alyson@alphacapitalpartners.com](mailto:alyson@alphacapitalpartners.com)

---



---

## Arela Opportunity Fund

---

Fund Manager/Organizer	Arela Partners
Fund Size	\$25 -\$100 Million
Website	<a href="https://www.arelapartners.com/opportunity-fund">https://www.arelapartners.com/opportunity-fund</a>
Investment Focus	Affordable housing, Commercial real estate, Community revitalization, Hospitality development, Mixed-use development, Multifamily residential, Single family residential, Small business development, Student housing, Other
If Other, Please Specify	Alternative real estate related investment with a focus on reduced risk and better than average rates of return on investment.
Geographic Focus	Nationwide (all 50 states, DC, and US territories)
Details if Regional/Local/Other	
Additional Fund Details	The ARELA Opportunity Fund intends to focus on investing in high-quality business and real estate within opportunity zones located in major US cities with long-term growth potential. We're taking the same simple, low-cost approach we use in all of our Investments and applying it to this exciting new way to invest. Our primary interest is the maintenance and creation of affordable housing and job creation. Types of projects: Residential Apartments, Town Homes and Single family development with Substantial Improvement, Hospitality, Student and Senior housing. Alternative real estate related investments. For project submission: <a href="https://www.arelapartners.com/property-submission-form">https://www.arelapartners.com/property-submission-form</a>
Organizational Details	THE ARELA PARTNERS - Real Estate Development Group, has been changing lives since 2000. Its management has more than 30 yrs experience with renovation, investment, financing and the re-purposing of residential real estate. We have been very successful at identifying and obtaining profitable opportunities to gain significant returns on investment through value add investment for our investor partners. We have also provided to our third party clients, services that include development, project evaluation, packaging, equity, financing and renovation services customized to their specific needs and requirements.
Contact	Vernon Allamby
Phone	800- 225-8116
Email	<a href="mailto:arelapartners@gmail.com">arelapartners@gmail.com</a>

---

**Bay Area Opportunity Fund**

---

Fund Manager/Organizer                      Panoramic Interests

---

Fund Size    \$60 Million

---

Website    [www.panoramic.com](http://www.panoramic.com)

---

Investment Focus                              Affordable housing, Mixed-use development, Multifamily residential, Workforce housing

---

If Other, Please Specify

---

Geographic Focus                              California

---

Details if Regional/Local/Other              Bay Area

---

Additional Fund Details

---

Organizational Details

---

Contact    JP Walsh

---

Phone    415-701-7003

---

Email    [jp@panoramic.com](mailto:jp@panoramic.com)

---

---

**B'KOZ Fund**

---

Fund Manager/Organizer                      Viceroy Equities

---

Fund Size    \$75 Million

---

Website    [www.viceroyequities.com](http://www.viceroyequities.com)

---

Investment Focus                                  Commercial real estate

---

If Other, Please Specify

---

Geographic Focus                                  New York

---

Details if Regional/Local/Other

---

Additional Fund Details                          Specific to Brooklyn, NY transactions.

---

Organizational Details

---

Contact    Joseph Douek

---

Phone

---

Email    [info@viceroyequities.com](mailto:info@viceroyequities.com)

---

---

## Caliber Tax Advantaged Opportunity Zone Fund, LP

---

Fund Manager/Organizer	Caliber - The Wealth Development Company
Fund Size	\$500 Million
Website	<a href="http://www.caliberco.com/opportunity">www.caliberco.com/opportunity</a>
Investment Focus	Affordable housing, Commercial real estate, Economic development, Hospitality development, Mixed-use development, Multifamily residential, Single family residential, Student housing
Geographic Focus	Arizona, Colorado, Nevada, Texas, Utah
Details if Regional/Local/Other	Greater Southwest Region
Additional Fund Details	Caliber's Tax Advantaged Opportunity Zone Fund, LP offers high-net-worth investors and their advisers the opportunity to invest in attractive projects throughout the Southwest region. Fund management has a market-driven allocation model, digging deep into attractive ozone locations, understanding the development pipeline, working with key stakeholders (such as city officials) and ensuring we develop, renovate, or build the right projects for that zone. The Fund is cash-flow focused, seeking to transform properties and deliver an attractive stabilized, cap rate while applying conservative debt limits to reduce portfolio risk. Fund management is targeting a portfolio allocation of 40% commercial/industrial/retail property, 30-40% multi-family property, and 20-30% hospitality property. This is Caliber's 5th private, discretionary fund, and a natural fit to the Company's existing short, mid, and long term investment options.
Organizational Details	Caliber has put over \$225M in equity capital to work on behalf of hundreds of individual investors who hold a combined net worth of \$2.5B+. Caliber's 10-year track record includes five discretionary private equity real estate investment funds and more than ten significant single-asset investment offerings. We have completed complex renovations, new development, construction, and similar real estate activities on a portfolio of hotel, office, apartment, industrial, retail, and single family assets. Caliber is naturally positioned to provide opportunity zone investors with access to an entrepreneurial, flexible, deal-focused team backed by institutional-grade back office, tax, accounting, and financial management.
Contact	Chris Loeffler
Phone	480-295-7600
Email	<a href="mailto:chris.loeffler@caliberco.com">chris.loeffler@caliberco.com</a>

---

## Community Outcome Fund

---

Fund Manager/Organizer	Karl Cureton
Fund Size	\$100 - \$500 Million
Website	<a href="http://www.outcomefund.us">www.outcomefund.us</a>
Investment Focus	Affordable housing, Commercial real estate, Economic development, Infrastructure investment, Mixed-use development, Multifamily residential, Small business development, Student housing, Workforce housing
If Other, Please Specify	Special Allocation Network Agreements built from confidence, integrity, authentication and distributed ledger technologies will transform how we enable and monetize relationships. Outcome Fund serves as a research, transaction and measurement platform for member based agreements.
Geographic Focus	Alabama, Arkansas, California, District of Columbia, Florida, Georgia, Illinois, Indiana, Kansas, Louisiana, Maryland, Massachusetts, Michigan, Nevada, New Jersey, New York, North Carolina, Ohio, Puerto Rico, Texas, Virginia
Details if Regional/Local/Other	Regional Technology Based Economic Development
Additional Fund Details	<p>The Community Outcome Fund will focus on location based Workforce &amp; Economic Empowerment Areas (WEEA) located in 20 regions across the U.S. Projects will utilize a mix of strategic Public/Private funding instruments. Projects will be led with an Opportunity Fund Capital raise.</p> <p>Outcome Fund serves as a research, transaction and measurement platform for member based agreements.</p> <ul style="list-style-type: none"><li>- Enable public/private partnerships &amp; contract teaming</li><li>- Measure learning outcomes for human capital growth</li><li>- Envision public sector procurement Innovation that promotes infrastructure growth</li><li>- Balance risk and investment decisions through metrics</li><li>- Utilize Data and Behavior Science to measure &amp; research community impact</li></ul>
Organizational Details	<p>The National Minority Technology Council (NMTC) was established over 20 years ago to serve the \$100 Billion Minority Technology Industry. Today the Council is organizing as the Council.Exchange to now include a research and Investment division.</p> <p>Looking Forward Research &amp; Development brings applied design based research to growth algorithms, Artificial Intelligence (AI), Social Networking and Governance, Risk and Compliance (GRC) to</p>

catalyze regional innovation ecosystems, stimulating economic development and uplifting the minority technology industry the community they serve.

---

Contact

Karl Cureton

---

Phone

202-796-7611

---

Email

[capital@outcomefund.us](mailto:capital@outcomefund.us)

---

## ConnectUP! Integrated Capital Fund

---

Fund Manager/Organizer	Y. Elaine Rasmussen
Fund Size	\$25 -\$50 Million
Website	N/A
Investment Focus	Affordable housing, Commercial real estate, Economic development, Infrastructure investment, Small business development, Workforce housing
If Other, Please Specify	
Geographic Focus	Illinois, Iowa, Minnesota, Nebraska, North Dakota, South Dakota
Details if Regional/Local/Other	
Additional Fund Details	Newly created fund.
Organizational Details	The ConnectUP! Fund will be a newly created, human-centered, integrated capital fund (a combination of debt, equity and grants) with an objective of addressing economic justice in access to blended capital to social enterprises led by people from marginalized communities. In recognition that there are numerous systemic factors influencing business development, the ConnectUP! Fund will evaluate Opportunity Zone-qualified opportunities and innovations in areas such as (but not exclusively) financial inclusion, sustainable energy, women's empowerment, and community development (rural, urban & tribal), this fund will have an intentional commitment to self-determined, vibrant communities and thriving ecosystems led by people of color.
Contact	Y. Elaine Rasmussen
Phone	651-242-9264
Email	<a href="mailto:lholmes@socialimpactnow.com">lholmes@socialimpactnow.com</a>

---

## Cresset-Diversified QOZ Fund

---

Fund Manager/Organizer Cresset-Diversified QOZ Management, LLC, a Delaware limited liability company

---

Fund Size \$500 Million

---

Website <https://cressetcapital.com/qualified-opportunity-zone-fund/>

---

Investment Focus Affordable housing, Commercial real estate, Community revitalization, Economic development, Hospitality development, Infrastructure investment, Mixed-use development, Multifamily residential, Renewable energy investment, Student housing, Workforce housing

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details Cresset Partners, led by Eric Becker and Avy Stein, and LCM Opportunity, led by Larry Levy, have partnered to create the Cresset-Diversified QOZ Fund. The Fund is managed by experienced teams of Real Estate and Private Equity professionals supported by community impact, legal, tax and accounting experts. The Fund is seeking to raise \$500 million in capital commitments.

---

Organizational Details

About Cresset

Private equity entrepreneurs Eric Becker and Avy Stein founded Cresset Capital Management with a vision to reinvent wealth advisory and family office services and a firm belief that clients deserve better. Within the Cresset affiliates suite of offerings, Cresset Partners focuses on private investments offering clients access to direct real estate, direct private company and private equity secondaries investment opportunities. Cresset Asset Management, an investment advisor registered with the U.S. Securities and Exchange Commission, offers wealth advisory, planning and innovative family office services.

About Diversified

Since 2003, Diversified Real Estate Capital, LLC, founded by Larry Levy, Jeffrey Cherner and Michael Miller, has offered equity capital and expertise for commercial real estate developments. High-net-worth individuals and family office investors seeking to diversify their assets and the potential of returns associated with highest quality real estate investments co-invest with nationally recognized developers that are Diversified's partners. The Company maintains



in-depth relationships with both its investors and joint venture partners, believing that these relationships are a key competitive advantage in the volatile investment environment. Diversifiedâ€™s highly experienced professionals identify prime opportunities and act quickly to creatively structure transactions. The Company offers its partners real estate expertise in management, renovation, development, financing, leasing and strategic re-positioning. The Company seeks to create institutional quality assets focused on office, retail, multi-family, industrial, residential and mixed-use properties.

---

Contact

Nick Parrish

---

Phone

312-429-2450

---

Email

[nparrish@cressetpartners.com](mailto:nparrish@cressetpartners.com)

---

## D.R.E.A.M. Fund

---

Fund Manager/Organizer Minnesota Opportunity Zone Advisors

---

Fund Size \$100 Million

---

Website [www.mn-oza.com](http://www.mn-oza.com)

---

Investment Focus Commercial real estate, Community revitalization, Economic development, Mixed-use development, Multifamily residential, Renewable energy investment, Workforce housing

---

If Other, Please Specify Community-driven projects that are eligible under OZ act and regulations, not project type specific

---

Geographic Focus Minnesota

---

Details if Regional/Local/Other

---

Additional Fund Details Minnesota Opportunity Zone Advisors seeks to inspire and serve mission-driven individual and institutional investors to contribute to the economic and social vitality of Minnesota. We do this by funding and executing quality new and substantial redevelopment real estate projects in Opportunity Zones that can achieve the triple bottom line of positive economic, social and environmental impact in our communities.

---

Organizational Details The DREAM Fund sponsor is a Delaware Statutory Benefit LLC with a stated social mission and reporting requirements. The fund is organized as a 144A securities offering for Accredited Investors.

---

Contact Jamie Stolpestad

---

Phone 203-585-7248

---

Email [jamie@mn-oza.com](mailto:jamie@mn-oza.com)

---

---

## Detroit Opportunity Fund

---

Fund Manager/Organizer North Coast Capital LLC

---

Fund Size \$250 Million

---

Website [www.ncp-re.com](http://www.ncp-re.com)

---

Investment Focus Affordable housing, Commercial real estate, Community revitalization, Economic development, Mixed-use development, Multifamily residential, Small business development, Student housing, Workforce housing

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories), Michigan

---

Details if Regional/Local/Other Detroit

---

Additional Fund Details

---

Organizational Details

---

Contact Matthew Temkin

---

Phone 313-878-8824

---

Email [info@oppfnd.com](mailto:info@oppfnd.com)

---

---

## Emergent Communities Fund

---

Fund Manager/Organizer	Rivermont Enterprise Capital
Fund Size	\$250 Million
Website	<a href="https://www.enterprisecommunity.org/financing-and-development/opportunity-zones-program/rivermont-enterprise-emergent-fund">https://www.enterprisecommunity.org/financing-and-development/opportunity-zones-program/rivermont-enterprise-emergent-fund</a>
Investment Focus	Affordable housing, Commercial real estate, Community revitalization, Economic development, Hospitality development, Mixed-use development, Multifamily residential, Small business development, Student housing, Workforce housing
If Other, Please Specify	
Geographic Focus	North Carolina, Virginia, Regional or Local
Details if Regional/Local/Other	Southeast U.S. with an initial focus on North Carolina and Virginia
Additional Fund Details	The Rivermont Enterprise Emergent Communities Fund spurs sustainable, diverse, and dynamic economic growth by revitalizing emerging main streets and supporting local entrepreneurs.
Organizational Details	The partners are Rivermont Capital, an experienced master developer; Enterprise Community Investment, which has been investing to revitalize communities for over 35 years, garnering expertise with over \$36 billion invested; and Beekman Advisors, a skilled fund manager, particularly at strategic valuation.
Contact	Shekar Narasimhan
Phone	703-752-8321
Email	<a href="mailto:shekar@beekmanadvisors.com">shekar@beekmanadvisors.com</a>

---

## EquityMultiple Opportunity Zone Fund

---

Fund Manager/Organizer EquityMultiple

---

Fund Size \$500 Million

---

Website <https://opportunity.equitymultiple.com/>

---

Investment Focus Commercial real estate, Hospitality development, Mixed-use development, Multifamily residential, Student housing, Workforce housing

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details

---

Organizational Details EquityMultiple is a leading online investment platform that is leveraging technology to help modernize the real estate industry. Together, our cross-disciplinary team is re-imagining how real estate investments are sourced, underwritten and funded, connecting investors to a range of pre-vetted investments across the country. Since 2016, EquityMultiple has executed over 50 commercial real estate transactions with an aggregate value of over \$700 million. We are privately funded by leaders in the real estate and finance industries and strategically partnered with Mission Capital, a real estate capital markets firm that executed more than \$70 billion in transactions. EquityMultiple operates nationally and currently has offices in NYC and San Francisco.

---

Contact Watue Sowaprox

---

Phone 646-960-6144

---

Email [watue.sowaprox@equitymultiple.com](mailto:watue.sowaprox@equitymultiple.com)

---

---

## Foundation Capital Opportunity Zone Fund

---

Fund Manager/Organizer                      Foundation Capital Partners

---

Fund Size    \$100 Million

---

Website    [www.foundationcapital.us](http://www.foundationcapital.us)

---

Investment Focus                              Commercial real estate, Economic development, Infrastructure investment, Mixed-use development

---

If Other, Please Specify

---

Geographic Focus                              Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details                      <https://przen.com/pr/foundation-capital-partners-announces-launch-of-industrial-focused-opportunity-fund-przen-33266441>

---

Organizational Details                      Foundation Capital Partners is a private investment management firm focusing on real asset opportunities. To achieve attractive returns for its investors, the firm focuses exclusively on opportunistic and disruptive investment situations. The firm has extensive experience investing in public and private credit and equity markets across the United States.

---

Contact

---

Phone

---

Email    [info@foundationcapital.us](mailto:info@foundationcapital.us)

---

---

## Fundrise Opportunity Fund

---

Fund Manager/Organizer Rise Companies Corp.

---

Fund Size \$500 Million

---

Website <https://fundrise.com/opportunity-fund>

---

Investment Focus Commercial real estate, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details

---

Organizational Details Fundrise Opportunity Fund is a recently organized Delaware limited partnership formed to originate, invest in and manage a diversified portfolio of commercial real estate properties, joint venture equity investments, and other real-estate related assets that are compelling from a risk-return perspective, particularly with a focus on multifamily rental units and office buildings located in qualified opportunity zones Opportunity Zones, as designated by the 2017 H.R. 1, known as the Tax Cuts and Jobs Act.

The Fund is managed by Fundrise Advisors, LLC, a registered investment adviser with the SEC and wholly owned subsidiary of Rise Companies Corp, the parent company of Fundrise. As of June 30, 2018, Rise Companies Corp, as a sponsor, has originated and invested in real estate with an aggregate purchase price of \$2.3 billion, and manages eight proprietary real estate investment vehicles.

The Fund anticipates an investment term of no less than 10 years in order to capture the full tax benefits offered under the tax code for Opportunity Funds.

---

Contact Benjamin Miller

---

Phone 202-584-0550

---

Email [ben@fundrise.com](mailto:ben@fundrise.com)

---

---

## Garnett Station Partners Opportunity Fund

---

Fund Manager/Organizer                      Garnett Station Partners

---

Fund Size    \$250 Million

---

Website    <https://www.gsp-ozf.com/>

---

Investment Focus                                  Commercial real estate, Hospitality development, Multifamily residential, Renewable energy investment, Small business development

---

If Other, Please Specify

---

Geographic Focus                                  Regional or Local

---

Details if Regional/Local/Other              Southeast

---

Additional Fund Details

---

Organizational Details

---

Contact    Alexander Peskind

---

Phone    646- 957-0756

---

Email    [opportunities@gsp-ozf.com](mailto:opportunities@gsp-ozf.com)

---



---

## Golden Door Partners Opportunity Zone Fund

---

Fund Manager/Organizer	Golden Door Asset Management
Fund Size	\$100 Million
Website	<a href="http://www.goldendoorasset.com">www.goldendoorasset.com</a>
Investment Focus	Economic development, Small business development
If Other, Please Specify	Private equity
Geographic Focus	Regional or Local
Details if Regional/Local/Other	Northeast
Additional Fund Details	Targeting to acquire lower-middle market businesses.
Organizational Details	<p>Golden Door Asset Management is a private equity firm focused on lower middle market businesses. We build strong businesses by combining our financial and operational expertise in labor-intensive businesses. Our mission is to create sustainable value for employees, customers, and shareholders.</p> <p>We are the leading minority-owned investment manager focused on acquiring small businesses in Opportunity Zones in the United States.</p>
Contact	Vijar Kohli
Phone	646-820-5672
Email	<a href="mailto:vijar.kohli@goldendoorasset.com">vijar.kohli@goldendoorasset.com</a>

---

**Gravitas Fund**

---

Fund Manager/Organizer	Sebastian Partners
------------------------	--------------------

---

Fund Size	\$25 Million
-----------	--------------

---

Website	<a href="https://www.gravitas-fund.com/">https://www.gravitas-fund.com/</a>
---------	---

---

Investment Focus	Commercial real estate, Hospitality development, Multifamily residential, Single family residential
------------------	---

---

If Other, Please Specify	
--------------------------	--

---

Geographic Focus	Colorado
------------------	----------

---

Details if Regional/Local/Other	Aurora
---------------------------------	--------

---

Additional Fund Details	Master planned community with 1,100 single family residential lots, 60 acres of commercial and hospitality development, and 11 acres of multifamily residential.
-------------------------	--

---

Organizational Details	
------------------------	--

---

Contact	Tom Dashiell
---------	--------------

---

Phone	510-919-1969
-------	--------------

---

Email	<a href="mailto:Tcdashiell@gmail.com">Tcdashiell@gmail.com</a>
-------	--

---

## Grubb Qualified Opportunity Fund - 2019

---

Fund Manager/Organizer Grubb Fund Management, LLC

---

Fund Size \$200 Million

---

Website [www.grubbproperties.com](http://www.grubbproperties.com)

---

Investment Focus Commercial real estate, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus Alabama, Regional or Local

---

Details if Regional/Local/Other Southeast, Mid-Atlantic and Texas

---

Additional Fund Details The Fund will operate as a side-car investment vehicle to the existing Grubb Southeast Real Estate Fund VI and will focus on properties where we can create synergies between office uses and multifamily uses to help reduce cost and enhance returns. Our nationally trademarked multifamily brand, Link Apartments, is a Class A, urban-infill apartment product focused on serving residents between 60% and 140% of area median income, a vastly underserved segment of the market today.

---

Organizational Details Grubb is an employee and board owned, vertically integrated fund manager, property development and property management company that has a more than half-century track record of success in multifamily and office through both value-add acquisition and development programs.

---

Contact Clark Spencer

---

Phone 704-405-5156

---

Email [cspencer@grubbproperties.com](mailto:cspencer@grubbproperties.com)

---

---

## Heritage Equity Partners Urban Opportunity Zone

---

Fund Manager/Organizer                      Heritage Equity Partners

---

Fund Size    \$100 Million

---

Website    [www.heritage-equity.com](http://www.heritage-equity.com)

---

Investment Focus                                  Commercial real estate, Community revitalization, Economic development, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus                                  New York

---

Details if Regional/Local/Other                Brooklyn and Queens

---

Additional Fund Details                          Heritage Equity Partners is a woman owned urban developer focused on urban revitalization. Past projects have helped transform neighborhoods including Williamsburg, Prospect Heights and Bushwick in Brooklyn.

---

Organizational Details

---

Contact    Toby Moskovits

---

Phone    718-408-8849

---

Email    [toby@heritage-equity.com](mailto:toby@heritage-equity.com)

---

---

## King Tide Capital Opportunity Zone Fund

---

Fund Manager/Organizer Chase Belew

---

Fund Size \$100 Million

---

Website

---

Investment Focus Hospitality development

---

If Other, Please Specify

---

Geographic Focus Hawaii, Texas

---

Details if Regional/Local/Other

---

Additional Fund Details King Tide Capital (KTC) has formed a single purpose entity for the purpose of developing and operating opportunity zone hospitality assets in Austin TX, San Antonio TX and Honolulu HI. The properties have a value in excess of \$115MM, and the fund is seeking to raise \$100MM in equity capital.

---

Organizational Details Sponsor team has a demonstrated track record of successfully acquiring, developing, and repositioning commercial properties throughout the United States.

---

Contact Chase Belew

---

Phone 512-773-1793

---

Email [cbelew@amscre.com](mailto:cbelew@amscre.com)

---

---

**LIHTC Development Group LLC**

---

Fund Manager/Organizer                      LIHTC Development Group LLC

---

Fund Size    \$100 Million

---

Website    [www.lihtcdev.com](http://www.lihtcdev.com)

---

Investment Focus                                  Affordable housing, Community revitalization, Economic development, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus                                  Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other              New Jersey

---

Additional Fund Details

---

Organizational Details

---

Contact    Nathan Bondar

---

Phone    201-636-7900

---

Email    [nb@lihtcdev.com](mailto:nb@lihtcdev.com)

---

---

## Local Grown Salads i95 Opportunity Zone (LGS I95 OZF)

---

Fund Manager/Organizer                      Local Grown Salads

---

Fund Size    \$60 Million

---

Website    <http://LocalGrownSalads.com>

---

Investment Focus                                  Commercial real estate, Community revitalization, Economic development, Small business development

---

If Other, Please Specify

---

Geographic Focus                                  Nationwide (all 50 states, DC, and US territories), Delaware, District of Columbia, Maryland, Massachusetts, New Jersey, New York, Rhode Island

---

Details if Regional/Local/Other

---

Additional Fund Details                              Local Grown Salads is an AgTech start-up that can produce up to 1,500,000 pounds of ready-to-eat salads, strawberries, beans, peas, and other vegetables in a 15,000 square foot urban farm.

Local Grown Salads technology:  
Grows fresh produce year-round in a controlled environment with the highest standards of food quality and food safety. Creates product that is organic, pesticide free, herbicide free, and GMO free  
Decreases transportation costs, thereby reducing the carbon footprint. Helps to address the problem of food deserts  
Allows indoor farming that helps save the planets arable land  
Local Grown Salads is a perfect fit for Opportunity Zone locations. Investment in an Opportunity Zone is intended to uplift low-income neighborhoods. Local Grown Salads farms will provide healthy and nutritious food, create local jobs, and use sustainable technology. The farms are strategically located at the end of the supply chain and close to the consumer; therefore, ready-to-eat salads are delivered locally on the same day they are harvested.

Each Local Grown Salads farm will employ 15 - 20 people. Individuals from the community will be trained to be farm managers, produce harvesters, produce cleaners, produce sorters, and packagers. A farm in the urban neighborhood will provide healthy food in priority areas.

Local Grown Salads farms are designed to be easy to scale. Farms are pre-fabricated, standardized, and delivered in 20 containers and assembled on location. As demand increases from large retailers and food service customers, we are able to rapidly deploy new farms.

A Local Grown Salads farm is an investment in a business, a neighborhood, and a community. Farms can be created in existing buildings that otherwise would be deemed obsolete. A farm located in a qualified opportunity zone will help to substantially improve the building and its value.

Our patent pending technology will produce a high quality product that is sustainable and profitable. The Capital Expenditure required for a farm is approximately \$2.2M. The farm is expected to be generating income within 150 days of site acquisition.

---

Organizational Details

Anticipated OZF Structure: We see an Opportunity Zone Fund is created, purchases a building in a Qualified Opportunity Zone, and owns the LGS Farm as a Qualified Opportunity Zone business. The LGS Farm operates in the building with a 10 year triple-net lease.

---

Contact

Zale Tabakman

---

Phone

416-738-2090

---

Email

[Zale@LocalGrownSalads.com](mailto:Zale@LocalGrownSalads.com)



---

## Loyalty Opportunity Fund

---

Fund Manager/Organizer Eazy Do It

---

Fund Size \$80 Million

---

Website

---

Investment Focus Small business development

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details

---

Organizational Details

---

Contact David Sillaman

---

Phone 757-319-2103

---

Email [dsillaman@eazydoit.com](mailto:dsillaman@eazydoit.com)

---

---

## Miami Opportunity Fund

---

Fund Manager/Organizer      Sikari Luxe

---

Fund Size      \$750 Million

---

Website      <https://www.sikariluxe.com/qualified-opportunity-fund-miami/>

---

Investment Focus      Commercial real estate, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus      Florida

---

Details if Regional/Local/Other      Miami

---

Additional Fund Details

---

Organizational Details      Sikari Inc. is a private real estate corporation headquartered in Tampa, Florida, specializing in opportunity zone fund investments. Currently has over \$1.5 billion in Qualified Opportunity Funds in active investment or planned active stages right now across five different funds. As a result, it sponsors a variety of investments in both residential and commercial real estate projects across Florida.

---

Contact      David Sillaman

---

Phone      757-319-2103

---

Email      [dsillaman@sikariluxe.com](mailto:dsillaman@sikariluxe.com)

---

---

## Normandy Opportunity Zone Fund LLP

---

Fund Manager/Organizer Normandy Real Estate Partners

---

Fund Size \$250 Million

---

Website <https://www.normandyrealty.com/>

---

Investment Focus Commercial real estate, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus Regional or Local

---

Details if Regional/Local/Other Northeast and Mid-Atlantic region

---

Additional Fund Details Normandy Real Estate Partners is a leading, privately-owned real estate operator and investment manager that targets underperforming office and mixed-use investments in well-located urban and transit-oriented submarkets in the Northeast and Mid-Atlantic region. Normandy utilizes its vertically-integrated operating platform to enhance value through creative repositioning, financial structuring, intensive management, and capital investment. Since its founding in 2002, the firm has managed a series of discretionary real estate funds and joint ventures backed by some of the most prestigious institutional investors in the world.

---

Organizational Details

---

Contact

---

Phone

---

Email [info@normandyrealty.com](mailto:info@normandyrealty.com)

---

---

## North Country Opportunity Zone Fund L.P.

---

Fund Manager/Organizer American Ag Energy Inc.

---

Fund Size \$24,750,000

---

Website <https://www.americanagenergy.com/opportunity-zone-fund-.html>

---

Investment Focus Other; Controlled Environment Agriculture

---

If Other, Please Specify

---

Geographic Focus New Hampshire

---

Details if Regional/Local/Other

---

**Additional Fund Details**

The Fund is raising \$24.75 million to invest in North Country Growers LLC (“NCG”). North Country Growers LLC is a limited liability company created to build and operate a 20-acre state of the art greenhouse integrated with Combined Heat and Power (“CHP”) to grow fresh, healthy, and high-quality vegetables in the Berlin, NH opportunity zone. In addition to the Opportunity Zone benefits, NCG’s planned operations are expected to yield gross profit margins of approximately 50% and EBITDA margins of approximately 40%. AAE and the Fund will each own 50% of NCG. Partners in the Fund will receive 80% of distributions until payout of their investment and then 50% thereafter (see attached schedule of expected returns).

NCG’s planned facility will comprise 10 acres of tomatoes, 10 acres of salad greens, and an 8.8 MW CHP plant. The CHP facility will serve to generate electricity for supplemental lighting of the greenhouses, heat for warming the greenhouses during cold periods, and carbon dioxide for enhancing plant growth. This strategy will enable the company to increase yields by approximately 70% (40% from supplemental lighting, 30% from carbon dioxide enrichment), achieve substantial reductions in operating costs, and attain near complete control of its energy strategy.

NCG’s project is “shovel-ready” with all permits secured and design work completed. The project will cost a total of \$58 million to build including working capital and reserves. NCG has secured \$33.25 million in senior debt from the largest financial institution in New Hampshire. The project has tremendous community support and is scheduled to break ground in April 2019 and be completed before year end.

---

**Organizational Details**

The Fund: North Country Opportunity Zone Fund L.P. (“NCOZ” or the “Fund”) is a limited partnership created under the 2017 Tax and Jobs Act to raise capital to invest in Controlled Environment

Agriculture Facilities in the Berlin, NH Opportunity Zone. The Fund's General Partner will be American Ag Energy, Inc. ("AAE").

The General Partner: AAE is a corporation that develops, builds, and operates large-scale ultra-efficient and sustainable greenhouses in conjunction with electricity generation facilities to produce both electricity and high value locally grown vegetables in close proximity to major markets in the Northeast.

---

Contact	Richard Rosen
Phone	617-484-3755
Email	<a href="mailto:rosen@americanagenergy.com">rosen@americanagenergy.com</a>

---

---

## Obsidian Opportunity Fund

---

Fund Manager/Organizer	Allen Alley
Fund Size	\$100-\$500 Million
Website	<a href="http://www.ObsidianOpportunityFund.com">www.ObsidianOpportunityFund.com</a>
Investment Focus	Commercial real estate, Community revitalization, Infrastructure investment, Renewable energy investment
If Other, Please Specify	Solar
Geographic Focus	Nationwide (all 50 states, DC, and US territories)
Details if Regional/Local/Other	Western States
Additional Fund Details	Obsidian Opportunity Fund was formed by a team of experienced investors and developers to professionally manage funds to match investors who have unrealized gains with development projects and communities of need.
Organizational Details	<p>Utility scale solar and other renewable development is complex. Successful investors must have expertise in land use permitting, complex tax structures, federal incentives, PURPA, FERC, and utility partnerships in addition to technical understanding of the equipment and interconnection to the grid. This makes utility scale solar and renewable investment an extremely difficult and inefficient market for the individual or corporation who is not a professional renewable energy investor.</p> <p>Our Opportunity Zone program provides incentives, when coupled with Obsidians experience as a utility scale renewable developer, that allow high net worth individuals and corporations to invest in solar and other renewable projects that simply have not been available to them.</p>
Contact	Allen Alley
Phone	503-245-8800
Email	<a href="mailto:AAleey@ObsidianOpportunityFund.com">AAleey@ObsidianOpportunityFund.com</a>

---

## Opportunity Development Group Fund I

---

Fund Manager/Organizer Opportunity Development Group

---

Fund Size \$650 Million

---

Website [www.odgfund.com](http://www.odgfund.com)

---

Investment Focus Commercial real estate, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories), Other

---

Details if Regional/Local/Other

---

Additional Fund Details ODG Fund I will invest in premier development deals in targeted growth markets, leveraging its team's proprietary sourcing, structuring advantage and development expertise. The fund presents an opportunity to invest alongside a vertically integrated construction and development sponsor with a consistent and proven track record, utilizing the Opportunity Zone incentive program to enhance investors' after-tax returns.

---

Organizational Details Opportunistic real estate investment and development team targeting markets in New York, Miami, Los Angeles, Denver and Chicago, led by Michael Stern of JDS Development and Gavriel Kahane of Arkhouse Partners. ODG builds on a track record of 10.0 MM sf of completed and pipeline developments nationally, including marquee NYC skyline projects.

---

Contact Zev Safran

---

Phone 646-849-3671

---

Email [zev@odgfund.com](mailto:zev@odgfund.com)

---

---

## OPZ Capital Opportunity Zone Fund

---

Fund Manager/Organizer Craig Bernstein

---

Fund Size \$500 Million

---

Website [www.opzcapital.com](http://www.opzcapital.com)

---

Investment Focus Commercial real estate

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

**Additional Fund Details** OPZ Capital is a Washington, DC based real estate private equity fund focused exclusively on Opportunity Zone Fund Investments. As one of the largest Opportunity Zone Funds in the Nation, OPZ's mission is to deliver investors with compelling risk adjusted returns in a tax efficient manner, while positively impacting the communities we invest in.

---

**Organizational Details** OPZ Capital was founded in 2018 by Craig Bernstein. Mr. Bernstein has more than 20 years of experience in real estate, including acquisitions, dispositions, construction, development, financing, asset management, property management and leasing. Mr. Bernstein is responsible for establishing OPZ Capital's strategic initiatives and overseeing the Fund's investor relations.

---

As one of the nation's leading Opportunity Zone experts, Mr. Bernstein has contributed to stories for the The New York Times, Associated Press, Washington Post and CNBC. Mr. Bernstein is a frequent speaker at Opportunity Zone events including the Global Institutional Real Estate Forum, Washington, DC Building Industry Association, Washington, DC Economic Partnership, Bisnow, The ASD Summit and The New York Riverside Experience. Prior to founding OPZ Capital, Mr. Bernstein was the Chief Investment Officer of White Star Investments, a prominent single family investment office in Bethesda, MD.

---

Contact Craig Bernstein

---

Phone 240-731-1310

---

Email [cbernstein@opzcapital.com](mailto:cbernstein@opzcapital.com)

---



---

## Origin QOZ Fund

---

Fund Manager/Organizer                      Origin Investments

---

Fund Size    \$200 Million

---

Website    [www.origininvestments.com](http://www.origininvestments.com)

---

Investment Focus                                  Commercial real estate, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus                                  Arizona, Colorado, Florida, Georgia, Illinois, Minnesota, North Carolina, Tennessee, Texas

---

Details if Regional/Local/Other                Atlanta, Austin, Charlotte, Chicago, Dallas, Denver, Houston, Minneapolis, Nashville, Phoenix, Raleigh

---

Additional Fund Details                          The Origin QOZ Fund seeks to invest in ground-up developments located in opportunity zones across Atlanta, Austin, Charlotte, Chicago, Dallas, Denver, Houston, Minneapolis, Nashville, Phoenix, and Raleigh. The Fund has a primary focus on institutional quality multifamily projects that are public transit-oriented.

---

Organizational Details                            Origin Investments is a real estate investment firm that was founded in 2007 and focuses on acquiring institutional quality office and multifamily properties in 11 fast-growing markets: Atlanta, Austin, Charlotte, Chicago, Dallas, Denver, Houston, Minneapolis, Nashville, Phoenix, and Raleigh. Origin is headquartered in Chicago and has regional offices in Charlotte, Dallas and Denver. Origin currently has \$1 billion dollars in assets under management.

---

Contact    Vince DeCrow

---

Phone    312-445-3919

---

Email    [vdecrow@origininvestments.com](mailto:vdecrow@origininvestments.com)

---

---

## Orlando Opportunity Zone Fund

---

Fund Manager/Organizer      Sikari Luxe

---

Fund Size      \$400 Million

---

Website      <https://www.sikariluxe.com/opportunity-fund-orlando/>

---

Investment Focus      Commercial real estate, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus      Florida

---

Details if Regional/Local/Other      Orlando

---

Additional Fund Details

---

Organizational Details      Sikari Inc. is a private real estate corporation headquartered in Tampa, Florida, specializing in opportunity zone fund investments. Currently has over \$1.5 billion in Qualified Opportunity Funds in active investment or planned active stages right now across five different funds. As a result, it sponsors a variety of investments in both residential and commercial real estate projects across Florida.

---

Contact      David Sillaman

---

Phone      757-319-2103

---

Email      [dsillaman@sikariluxe.com](mailto:dsillaman@sikariluxe.com)

---

---

## Peachtree Hotel Opportunity Zone Tax Advantage Fund, LP

---

Fund Manager/Organizer Peachtree Hotel Group | STONEHILL

---

Fund Size \$100 Million

---

Website <http://peachtreehotelgroup.com/phgwp/divisions/>

---

Investment Focus Hospitality development

---

If Other, Please Specify Hotel development, redevelopment & adaptive reuse

---

Geographic Focus Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details The Fund intends to pursue its investment objectives by developing, owning, operating and disposing of real estate assets primarily consisting of premium-brand, limited-service, select-service and compact full-service hotels located in target QO Zones ("Target Assets"). The Fund may acquire or invest in such Target Assets directly or indirectly through joint ventures.

---

Organizational Details Peachtree Hotel Group is a privately held real estate investment company that finances, owns, operates, manages and develops hotel and hotel-related assets throughout the United States. Founded in 2008, Peachtree Hotel Group, and its subsidiary STONEHILL, has invested, through acquisition, origination or development, in a portfolio of 200 hotels and mortgage loans secured by hotel properties, with a cost basis of more than \$2.2 billion. Peachtree Hotel Group provides investment services, loan origination, loan servicing, property management, asset management, development, and construction/renovation management for limited-service and select-service hotels located throughout the United States.

---

Contact J. Dana Tsakanikas

---

Phone 404-497-4118

---

Email [dana@stonehillsc.com](mailto:dana@stonehillsc.com)

---

---

## PEEK Opportunity Fund I

---

Fund Manager/Organizer PEEK Development

---

Fund Size \$50 Million

---

Website

---

Investment Focus Multifamily residential

---

If Other, Please Specify

---

Geographic Focus New Jersey

---

Details if Regional/Local/Other North Jersey

---

Additional Fund Details PEEK Opportunity Fund I is focused on investment, development and management of 65-125 unit projects in urban areas of North Jersey. Generally, projects will be ground up development in areas near major transportation hubs. PEEK Development will be the fund manager and contribute between 15-20% equity.

---

Organizational Details PEEK Development is a Joint Venture between Equis Realty Partners and The Fountain Group with \$85+ million in projects involving 300+ units under contract.

Equis Realty Partners owns and manages a portfolio of multi-family apartments in North Jersey. As part of the firm's acquisition strategy, Equis generally performs extensive value-add capital improvements in order to maximize property repositioning.

The Fountain Group real estate investment, management and development firm focused on multi-family and mixed-use assets throughout North Jersey. The company, which has developed and managed over 700 units, continues to grow its portfolio by focusing on renovations to existing buildings as well as ground-up development. Projects in The Fountain Group pipeline are valued in excess of \$70 million.

---

Contact Phillip Evanski

---

Phone 646-455-1021

---

Email [pevanski@equisrp.com](mailto:pevanski@equisrp.com)

---

---

## Rural COZ

---

Fund Manager/Organizer Shawn Bertini & Chris Montgomery

---

Fund Size \$50 Million

---

Website <http://ruralcoz.com>

---

Investment Focus Commercial real estate, Mixed-use development, Multifamily residential, Small business development, Workforce housing

---

If Other, Please Specify

---

Geographic Focus Colorado, Wyoming

---

Details if Regional/Local/Other

---

Additional Fund Details The fund is focused on rural Colorado and selective communities beyond. With a large deal funnel in place, the fund is raising now on a per-project basis for real estate projects. Short term emphasis will be on new real estate development with an eye on several major rehab projects as well.

---

Organizational Details Rural COZ was established by Four Points Funding, an organization with real estate and business investment throughout the western slope of Colorado. The founders have been building an OZ deal funnel for the better part of 2018 and are moving forward now.

---

Contact Shawn Bertini

---

Phone 970-367-6151

---

Email [shawn@fourpointsfunding.com](mailto:shawn@fourpointsfunding.com)

---

---

## RXR Realty OZ Fund

---

Fund Manager/Organizer      RXR Realty

---

Fund Size      \$500 Million

---

Website      <http://www.rxrrealty.com/>

---

Investment Focus      Mixed-use development

---

If Other, Please Specify

---

Geographic Focus      New York

---

Details if Regional/Local/Other      New York City

---

Additional Fund Details

---

Organizational Details      The RXR platform manages 69 commercial real estate properties and investments with an aggregate gross asset value of approximately \$18.1 billion, comprising approximately 24.6 million square feet of commercial properties, inclusive of a multi-family residential portfolio of approximately 2,600 units under operation or development, and control of development rights for an additional approximately 3,600 multi-family and for-sale units in the New York Metropolitan area. Gross asset value compiled by RXR Realty in accordance with company fair value measurement policy and is composed of capital invested by RXR and its partners, as well as leverage.

---

Contact

---

Phone

---

Email

---

---

## Savage Grant Opportunity Fund

---

Fund Manager/Organizer                      Savage Grant

---

Fund Size    \$50 Million

---

Website    <https://savagegrant.com/>

---

Investment Focus                              Commercial real estate, Small business development

---

If Other, Please Specify

---

Geographic Focus                              Regional or Local

---

Details if Regional/Local/Other              Appalachian region

---

Additional Fund Details

---

Organizational Details

---

Contact    Patrick Farrell

---

Phone    800- 480-7867

---

Email    [info@savagegrant.com](mailto:info@savagegrant.com)

---

---

## Saxum Opportunity Zone Fund

---

Fund Manager/Organizer                      Saxum Real Estate

---

Fund Size    \$100 Million

---

Website    <https://www.saxumre.com/opportunity-zones.html>

---

Investment Focus                                  Commercial real estate, Hospitality development, Mixed-use development, Multifamily residential, Student housing, Workforce housing

---

If Other, Please Specify

---

Geographic Focus                                  Regional or Local

---

Details if Regional/Local/Other                Northeast, Mid-Atlantic

---

Additional Fund Details

---

Organizational Details

---

Contact    Chad DeBolt

---

Phone

---

Email     [cdebolt@saxumre.com](mailto:cdebolt@saxumre.com)

---



---

## Shorewood Opportunity Fund

---

Fund Manager/Organizer Shorewood Real Estate Group LLC

---

Fund Size \$250 Million

---

Website <http://shorewoodgrp.com/shorewood-opportunity-zone-fund/>

---

Investment Focus Affordable housing, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus New York

---

Details if Regional/Local/Other New York City

---

Additional Fund Details Shorewood is currently in the process of raising an Opportunity Zone Fund focused on investing in New York City. With the first multifamily development deal under contract, Shorewood is in the process of assembling a pipeline of other qualified investment offerings for mixed-use development, affordable housing development, and value add renovation.

---

Organizational Details Shorewood Real Estate Group LLC is a multi-strategy real estate investment platform that specializes in the acquisition, financing, and development of institutional quality assets in major gateway markets in the US. Since 2012, Shorewood has structured investments with a cost basis in excess of \$650 million. In conjunction with its joint venture partner, Prodigy Network, Shorewood has invested over \$200 million of crowd-funded equity, making it by far the largest user of this alternative source of real estate capital. Through its longstanding relationships with leading financial institutions Shorewood has secured over \$700 million of acquisition/construction and permanent financing.

---

Contact

---

Phone

---

Email [info@shorewoodgrp.com](mailto:info@shorewoodgrp.com)

---

---

## Sixty West Access Opportunity Fund

---

Fund Manager/Organizer                      Sixty West Access Fund Manager LLC

---

Fund Size    \$200 Million

---

Website    <https://sixtywestfunds.com/>

---

Investment Focus                                  Commercial, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus                                Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details

---

Organizational Details                         Sixty West focuses on four specific areas of investment opportunity: Low Income Housing Tax Credits, Historic Preservation and Rehabilitation, Renewable Energy Projects, and Land Utilization. These four areas allow Sixty West to provide investors with a diverse portfolio designed to optimize their return on investment.

---

Contact    Jason Cordon

---

Phone     404-304-0228

---

Email     [jcordon@sixty-west.com](mailto:jcordon@sixty-west.com)

---

---

## SkyBridge-EJF Opportunity Zone REIT

---

Fund Manager/Organizer SkyBridge Capital II, LLC

---

Fund Size \$3 Billion

---

Website <http://www.skybridge.com/>

---

Investment Focus Commercial real estate, Hospitality development, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus Nationwide

---

Details if Regional/Local/Other

---

Additional Fund Details SkyBridge Opportunity Zone Real Estate Investment Trust, Inc. (“SOZ REIT”) is a private, non-exchange traded real estate investment trust (“REIT”) with a mandate to invest in residential, commercial and industrial real estate (new development and redevelopment) in US Treasury-designated Opportunity Zones.

The REIT’s management team intends to pursue an investment strategy focused on building a diversified real estate portfolio – by geography, property type and developer – in Opportunity Zones. To comply with the Opportunity Zone program requirements, the REIT will focus on the development of new projects and substantial redevelopment of existing ones. The REIT seeks to provide diversification for investors and thus, when fully invested, maximum exposure to any single project is not expected to exceed 10% of NAV at cost.

The REIT’s management team seeks to pursue a thematic approach to identifying attractive property types based on secular trends, including multi-family and logistics-related industrial. Targeted Opportunity Zones will be selected after analyzing various idiosyncratic factors, including population and economic growth, which tend to correlate positively with real estate price appreciation. The REIT’s management team will partner with local developers. Potential projects are presently being sourced and evaluated and a pipeline of actionable deals has been developed by the REIT’s management team.

---

Organizational Details SkyBridge Capital II, LLC (“SkyBridge”) is an SEC-registered investment adviser and global alternative investment manager with approximately \$9.6 billion in assets under management or advisement (as of September 30, 2018). The firm was founded by Anthony Scaramucci in 2005. SkyBridge provides investment solutions that address a wide range of market participants from

individual investors to large institutions. In addition to the SkyBridge Opportunity Zone REIT, investment solutions include multi-strategy commingled fund-of-hedge-funds products, customized separate account hedge fund portfolios, hedge fund advisory services and a long-only equity mutual fund. SkyBridge also produces a large annual conference in the United States known as the SkyBridge Alternatives Conference (“SALT”).

---

Contact	Jason Zins
Phone	212-485-1908
Email	<a href="mailto:jzins@skybridgecapital.com">jzins@skybridgecapital.com</a>

---

---

## Somerset Partners OZ Fund

---

Fund Manager/Organizer Somerset Partners

---

Fund Size \$200 Million

---

Website <http://www.somersetpartnersllc.com/opportunity-fund/>

---

Investment Focus

---

If Other, Please Specify

---

Geographic Focus New York

---

Details if Regional/Local/Other South Bronx, New York City

---

Additional Fund Details Somerset Partners is a private investment firm with commercial and multi-family property investments throughout the United States. Its clients and partners include both high net worth and institutional investors. Since 2000, Somerset has put together a 13+-year track record on over \$2 billion in acquisitions to date.

---

Organizational Details

---

Contact

---

Phone

---

Email

---

---

## Sound West OZ Fund I

---

Fund Manager/Organizer                      Sound West Realty Capital

---

Fund Size    \$50 Million

---

Website    [www.soundwestrc.com](http://www.soundwestrc.com)

---

Investment Focus                                  Hospitality development, Mixed-use development, Multifamily residential, Other

---

If Other, Please Specify

---

Geographic Focus                                  Washington

---

Details if Regional/Local/Other                Bremerton waterfront

---

Additional Fund Details                          Marina Square will be a signature mixed-use, waterfront development in a central location, steps away to car and high-speed ferry service, transit center, and a yacht harbor located just minutes from Seattle on Puget Sound. The 122 room Cambria Hotel tower (the premier brand of the Choice Hotel Group) will feature a waterfront restaurant, bar, fitness center, market and conference center. The unique design will ensure every room has a view of the water, marina and mountains.

A separate high-end apartment tower will feature a variety of urban-living apartment flats, all with views, and access to amenities which include: rooftop deck, fitness center, private clubhouse, business center and lounge.

Both towers will sit atop a subterranean, paid parking garage for 350 stalls with distinct levels servicing the hotel, private residences and marina.

---

Organizational Details                            Our project will be built in conjunction with Sound West Group (SWG) a fully diversified real estate company in the Puget Sound region of Washington. They encompass all aspects of the development process, SWG is a leading developer of multi-family, single family, and commercial real estate in the Western Puget Sound region of the Pacific Northwest. They pride themselves on Developing Community with Vision & Integrity.

---

Contact    Noelle Walters

---

Phone    360-362-7230

---

Email    [noelle@soundwestgroup.com](mailto:noelle@soundwestgroup.com)

---

---

## Strategic Opportunity Zone Fund

---

Fund Manager/Organizer                      The Strategic Investment Management

---

Fund Size    \$500 Million

---

Website    <https://thestrategicgroup.com/>

---

Investment Focus                                  Commercial real estate, Mixed-use development

---

If Other, Please Specify

---

Geographic Focus                                Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details                        The Fund focuses on commercial and residential real estate and mixed-use development throughout the country, with an emphasis on cities with strong macro-economic trends. The Fund is well diversified across multiple investment types, and is leveraging longstanding relationships with best-in-class developers including: Urban Creek Partners, GBT, Tribridge Residential, Patterson, and Draper & Kramer to name a few.

---

Organizational Details                         The Strategic Group is a boutique private equity firm that focuses on helping clients through tax mitigation and investment strategies. The Firm is regarded as an industry leader in private equity and tax strategies, with in-house expertise, and has served as the developer and trusted advisor on billions of dollars of real estate projects over the past 15 years. Their tax and legal expertise makes them uniquely qualified to manage an Opportunity Zone Fund.

---

Contact    Mike Fields

---

Phone    404-963-6657

---

Email     [IR@TheStrategicGroup.com](mailto:IR@TheStrategicGroup.com)

---

---

## Tampa Qualified Opportunity Zone Fund

---

Fund Manager/Organizer      Sikari Luxe

---

Fund Size      \$50 Million

---

Website      <http://www.sikariluxe.com/blog/portfolio-item/tampa-qualified-opportunity-fund/>

---

Investment Focus      Hospitality development

---

If Other, Please Specify

---

Geographic Focus      Florida

---

Details if Regional/Local/Other      Tampa

---

Additional Fund Details

---

Organizational Details

---

Contact      David Sillaman

---

Phone      757-319-2103

---

Email      [dsillaman@sikariluxe.com](mailto:dsillaman@sikariluxe.com)

---



---

**Tech Transfer Fund I, Inc.**

---

Fund Manager/Organizer            Grey Holdings Group, Inc

---

Fund Size                                \$976,690

---

Website                                 [www.grey-ops.com](http://www.grey-ops.com)

---

Investment Focus

---

If Other, Please Specify            Defense Technology Investment

---

Geographic Focus                    Maryland

---

Details if Regional/Local/Other    Lusby, MD

---

Additional Fund Details            The Fund invests in an opportunity zone business, Grey Ops LLC. Grey Ops is about to launch its defense technology product primarily to be used by the military and first responders.

---

Organizational Details            Grey Ops has a license to commercialize a Department of Defense technology developed to neutralize primary explosives, allowing for safe transport and forensic testing. This technology is seen as vital to combat national and international terrorism. This technology is novel and will be ready for commercialization in 1-3 months. The proceeds from the Fund will be used to purchase material, the cost of production and labor.

---

Contact                                 Brian Gamble

---

Phone                                    410-627-9298

---

Email                                    [brianbgamble@grey-ops.com](mailto:brianbgamble@grey-ops.com)

---

---

## The Pearl Fund

---

Fund Manager/Organizer	Brian P Phillips
Fund Size	\$25 Million
Website	<a href="http://www.thepearl.fund">www.thepearl.fund</a>
Investment Focus	Small business development, Other
If Other, Please Specify	Early-Stage Startup/Venture Fund targeting high potential companies to be located in the Opportunity Zone of 18434
Geographic Focus	
Details if Regional/Local/Other	All businesses will be located in Jessup, PA 18431
Additional Fund Details	Most Opportunity Zone funds exclusively target real estate. We are investing exclusively in high potential early-stage startups that we carefully select and directly oversee. This, in turn, will create a greater economic impact and provide significantly higher returns for all fund investors.
Organizational Details	<p>The fund is managed by B. P. Phillips who has 30+ years of startup, investment &amp; economic development experience.</p> <p>The fund will only invest in opportunities where he can leverage his extensive experience and oversight in the investment by gaining a controlling interest and co-locating operations in the OZ located in the 18434 zip code More about Mr. Phillips is at <a href="http://www.linkedin.com/in/brianpphillips">www.linkedin.com/in/brianpphillips</a></p>
Contact	Brian Phillips
Phone	
Email	<a href="mailto:bpaulphillips@gmail.com">bpaulphillips@gmail.com</a>

---

### Treetop Opportunity Zone Funds I, II, & III

---

Fund Manager/Organizer Treetop Development

---

Fund Size \$50-200 Million

---

Website [www.treetopdev.com](http://www.treetopdev.com)

---

Investment Focus Affordable housing, Community revitalization, Economic development, Mixed-use development, Multifamily residential

---

If Other, Please Specify

---

Geographic Focus New Jersey, New York

---

Details if Regional/Local/Other

---

Additional Fund Details Each fund will invest in 1 deal

---

Organizational Details

---

Contact Eric Distenfeld

---

Phone

---

Email [whatsnext@treetopdev.com](mailto:whatsnext@treetopdev.com)

---

---

**Veterans Investing**

---

Fund Manager/Organizer                      Eazy Do It

---

Fund Size    \$100 Million

---

Website

---

Investment Focus                                  Multifamily residential

---

If Other, Please Specify

---

Geographic Focus                                  Nationwide

---

Details if Regional/Local/Other

---

Additional Fund Details

---

Organizational Details

---

Contact    David Sillaman

---

Phone    757- 319-2103

---

Email    [dsillaman@eazydoit.com](mailto:dsillaman@eazydoit.com)

---

---

## Virtua Opportunity Zone Fund

---

Fund Manager/Organizer Virtua Partners

---

Fund Size \$200 Million

---

Website <https://virtuapartners.com/opportunity-zones/>

---

Investment Focus Multifamily development

---

If Other, Please Specify

---

Geographic Focus Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details

---

Organizational Details Virtua Partners is a global private equity firm specializing in commercial real estate. It sponsors a variety of investment funds and commercial real estate projects across the United States and currently has 16 million square feet of assets under management or development.

---

Contact Zachary Chavez

---

Phone 480-757-6503

---

Email [zachary@virtuacapital.com](mailto:zachary@virtuacapital.com)

---

---

## Young Latin

---

Fund Manager/Organizer                      McGuireWoods

---

Fund Size    \$100 Million

---

Website    <http://www.mcguirewoods.com/>

---

Investment Focus                                  Affordable housing, Economic development, Mixed-use development, Renewable energy investment, Small business development

---

If Other, Please Specify

---

Geographic Focus                                  Nationwide (all 50 states, DC, and US territories)

---

Details if Regional/Local/Other

---

Additional Fund Details

---

Organizational Details

---

Contact    Sam Woods

---

Phone     787-578-4044

---

Email     [info@iscanimaging.in](mailto:info@iscanimaging.in)

---