

Rebekah Carlson

From: Matthew D. Baumann <matt@crosstownrea.com>
Sent: Wednesday, April 1, 2020 5:16 PM
To: Sariya
Subject: Today in CASCO-19 News
Attachments: VID-20191219-WA0018.mp4; Ross Letter to LL.docx; Script for Landlords Recouping Rent Payments.pdf; Batteries Plus Letter to LL.pdf; Help with CMBS Loans.docx; SJC-Herrold-Emerging Tenants Report-March2020.pdf; SJC-Herrold-Retail Expansion Report-March2020.pdf

Anyone dreading emails and phone calls these days? Me, too...

- Interesting video attached about life in Japan. Any lessons for us property owners here?
- [Screening for C-19 at Your Property Without Breaking Law](#)
- Ross Letter to Landlords attached – at least April is getting paid!
- [ILL RE Journal Webinar on Force Majeure - April 8](#)
- Ted Schmidt suggests reading your insurance policies...here's the note he sent to his agent:

Don,
This is notice of our claim for loss of business income/ extra expense. This loss has started and I anticipate it will be ongoing.
You stated in your March 27, 2020 email (below) to Greg Kerr:
"Hello Greg, Can you send me the Communicable Disease exclusion regarding Business Interruption/Loss of Income? I need it in a hurry if possible. I searched the policy and could not find it."
We have reviewed the policy you emailed to us 12/10/2019 and the reason you could not find the exclusion is because it is not in or attached to the policy delivered to us and therefore not applicable to our policy.
Please let me know if I need to do anything else to initiate this claim.
Thank you,
Ted

- [SVN Webinar - Guide to Rent Collection in this Environment](#) (script attached for reference for this call)
- Batteries Plus Says No April Rent (attached letter)
- Board ups happening in the Gold Coast (pictures by Leigh) – see below
- Craig/Mark hired Hart Advisors to restructure a couple of CMBS loans a few years ago with limited success. Notwithstanding, however, this may be an avenue to consider given our call yesterday.
- [Rent Relief for Restaurants](#) article that may be helpful to forward to your dining establishments
- [Tenants Guide to Rent Relief](#) another one to pass along, if you desire
- Emerging Tenants Report/Retail Expansion Report attached – thank you, David Russo!



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March 30, 2020

Dear Landlord,

The coronavirus pandemic continues to be an unprecedented event that has created a disruption to our nation's health and economy. The speed of this crisis is causing a daily evaluation of our operations for the safety of our associates, our customers, and the broader communities we serve.

As we continue to navigate this public health and economic crisis, our leadership team is taking the steps necessary to have a viable business operation after these restrictions are lifted. Due to this declared National Emergency and the governmental restrictions imposed at the state and local level by numerous shelter-in-place or similar orders throughout the country during this unprecedented time that have significantly impacted us, we are seeking cooperation with our landlords to work through our long-term lease relationships to ensure we will be able to fulfill future obligations.

Unfortunately, we must let you know that Batteries Plus, LLC will not be making any of its rent payment for April 2020. Please know we did not make this decision lightly. We cannot predict the future or the extent of this crisis but we hope to resume our rent payments as soon as reasonably possible. We will be contacting you in the upcoming days to discuss potential options for proceeding during and after this crisis, in hopes of reaching a mutually beneficial end result.

Thank you for your anticipated cooperation during this challenging time.

Sincerely,

A handwritten signature in black ink that reads "Kirtis Hill".

Kirtis Hill
VP Market and Business Development

I hope this email finds you well, especially considering the current COVID-19 environment. I am reaching out because as you may recall, my firm, Hart Advisors Group is a commercial loan advisory company that started from the ashes of the 2009 financial collapse. Hart has been a borrower advocate for the better part of 11 years, having completed over \$5 Billion in CMBS loan restructures. With our years of experience, our knowledge basis and deep-seated relationships with special servicers, the current environment has put our firm in a unique position to assist borrowers.

Not a single special servicer is staffed for this event. Our servicer relationships are guiding us in the best manner to assist our clients and streamline the process that asset managers will need to work through. Hart is on the forefront of shaping the solutions now. Our team has worked on a plan to offer what we call a "Relief Modification". After consulting with senior leadership at each special servicer, they are supportive of aggregating numerous deals together and negotiating across bulk lists of loans with similar modification needs. By aggregating numerous loans and streamlining the process our client's requests make it efficient and will be processed first. Further information about our Relief Modification program is below.

Hart Advisors Group will provide a "Relief Modification" at a quarter of our normal pricing for loans with the following parameters:

1. Loan was performing on March 1, 2020;
2. Asset must be hospitality, retail, or student housing;
3. The sole reason for the modification request is relief due to the impact of COVID-19;
4. Short Term Relief is being sought for 12 months or less in the form of:
 - a. Temporary payment forbearance;
 - b. Interest rate reductions;
 - c. Reserve waivers and releases;
 - d. Fee waivers (late charges, default interest, etc.); and,
 - e. Extensions.

Pricing for sponsors is as follows:

1. 5 or more loans, \$20,000, payable \$10,000 on engagement and \$10,000 on completion.
2. Under 5 loans, \$22,500, payable \$10,000 on engagement and \$12,500 on completion.

If this is of interest to your group, I'm happy to arrange a call to further discuss.

Please feel free to visit our website at www.hart-advisors.com.

Sincerely,

Seth



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March 31, 2020

Dear Landlord:

As we are all aware, we are witnessing unprecedented times and feeling the significant impact that the COVID-19 pandemic is having on our daily lives, communities, and businesses. Local, national, and international health organizations - including the World Health Organization and U.S. Centers for Disease Control and Prevention - have issued directives suggesting that all public gatherings be suspended. In addition, the majority of local and state governments have issued mandates suspending all public gatherings, ordering restrictions on the operation of non-essential businesses, and ordering residents to shelter-in-place. Given these unforeseeable circumstances beyond Ross' control and the impossibility of Ross continuing to operate its stores as the parties could have reasonably foreseen or anticipated, Ross has made the unavoidable decision to temporarily close all of its stores, offices, and distribution centers nationwide at different times during the month of March.

As a sign of good faith, Ross intends to advance April rent and additional charges to you to assist you with weathering the storm created by this pandemic, as well as stabilizing your cash flow with respect to your smaller tenants who, we hope, can reopen and continue to operate in the shopping center. In the coming days and weeks, we want to discuss our path forward with you in the face of this pandemic - including, but not limited to, rent relief and credit for the days when our store was closed, or until our business has been reestablished to its pre-pandemic level. We will, of course, keep you updated as to our plans as we continue to deal with this unprecedented and unanticipated situation.

Ross strongly values its working relationship with you. We remain committed to working with you during this extraordinary time to help protect the safety and health of our associates, customers, and the public.

Thank you in advance for your support. Please note the address below may be different from what you have on file. Ross requests that during this national emergency, all notices and other communication be directed to the addresses shown at the end of this letter. If you have any questions regarding this letter or wish to setup a time to discuss a path forward, please contact Gregg McGillis, Group Executive Vice President, Property Development at (925) 965-4626, or Richard Lietz, Group Senior Vice President, Real Estate at (925) 965-4514.

For all notices other than Rent statements, change of address notices, and requests for access to the Premises:

Ross Stores, Inc.
5130 Hacienda Drive
Dublin, CA 94568
Attn.: Group Executive Vice President, Property Development

With a copy to:
Ross Stores, Inc.
5130 Hacienda Drive
Dublin, CA 94568
Attn.: Real Estate Law Department

For all change of address notices:
property.administration@ros.com via electronic mail

With a copy to:
Ross Stores, Inc.
5130 Hacienda Drive
Dublin, CA 94568
Attn.: Real Estate Law Department

For all requests for access to the Premises:
property.administration@ros.com via electronic mail

Sincerely,

A handwritten signature in blue ink, appearing to read "Gregg McGillis".

Gregg McGillis
Group Executive Vice President, Property Development
Ross Stores, Inc.

SVN Rock Advisors: Script for Landlords – Recouping Rent Payments

Context:

April 1st will be a difficult day for many landlords and property managers. The outbreak of COVID-19 has had a strong negative effect on many current renters' capacity to pay rent in the short term however, it has also created the opportunity for many more to forgo their responsibilities, whether through collective organization or simply individual refusal. Many have decided not to pay their rent.

As a property owner, it is your responsibility be proactive and reach out to tenants.
Our guide for this discussion:

1. **It's a Discussion not an Interrogation:** You want to keep good residents! - Resident retention is imperative – for a strong ongoing NOI. We have developed 3 separate documents to help you with this discussion:

All documents are downloadable at this site: <https://svnrock.ca/events/webinars/>

- i.) Document to send pre-April 1st: How to identify tenants who **may** be in trouble paying April 1st rent.
- ii.) Document to send post-April 1st: How to follow up with tenants who **have not paid the rent.**
- iii.) Rent Arrears Payment Plan: How to follow up with tenants to create a payment plan in the COVID -19 Environment.

We also have provided a fourth document which provides your staff with the details they need to keep your building running smoothly in this COVID environment.

The goal is to identify residents who may require the ability to enter into a rent arrears plan as of April 1st, and to provide them with the mechanism to work with you and your staff.

2. It's Your Responsibility to Review which Tenants Qualify for COVID-19 Agreements:

You'll likely have many tenants who can still pay their rent. **In this environment, your job is to figure out which tenants are directly affected by COVID-19.** Specifically:

- Prior to reaching out to these tenants you should review their applications and current resident profiles: payment history, current employer, income, and size of household.
- Look at your rent roll: Both higher rent, and lower rent tenants are going to be at risk. **We can help you with this – reach out to us: derek.lobo@svn.com.**

By reviewing resident profiles, you can best determine who the high risk residents are for either contracting COVID-19, or who may be unable to afford their rent, and determine what the potential options are before-hand whether it be a payment plan, or partially deferred payments. This ensures that the process is efficient and accurate.

By doing this, it becomes a productive discussion.

3. Who's at Risk?

- It's not families with dual incomes, young professionals, or seniors on a fixed income
- It's:
 - o Residents working in retail, food service, and other services that have had their incomes shut down by the current shut down

4. Who Should Call?

- These calls are important and should be completed by the property manager, or leasing manager, and not be by front line staff.
- Be careful not to antagonize the resident during this call even if they push back as that can break down communications and remove any potential to recoup rents. This will continue to be an on-going process and will require careful consideration and a flexible attitude.

We have provided a script below that can be edited for your purposes:

Script and phone guidelines:

Hello it's **NAME** from **COMPANY** How are you keeping during these times?

We wanted to reach out to our residents during this precarious time to check up on you and make sure you were being taken care of. Has the shutdown affected you?, or have you been able to continue working from home?

Have there been any issues you wanted to report in your apartment or the community? The large influx of residents at home can have a taxing effect on building communities and we wanted to make sure it wasn't affecting you and your family.

We know that **NAME OF SUPER** the buildings superintendent works hard to ensure that your community is clean and maintained and hope that their absence hasn't created any issues. **NAME OF SUPER** mentioned that they have been hearing from some residents that have been severely affected and may be unable to pay their rent and wanted to make sure you and your family were doing ok. If not, please let us know and we would be happy to work with you!

Let's talk about how we address your rent payment. If you are not able to pay the full amount:

- We can offer you a deferred payment plan that would spread out the cost of April's rent **\$X,XXX** over the remainder of your lease "**X number of months**". We would require a minimal payment in April of at-least **XX%** of your current monthly rent and can prorate the remainder.

This would ensure perseverance of your housing needs and we can have the paperwork emailed to you shortly. Can you please confirm your email address?

Excellent, we can have that sent over to you, please sign and either scan or photograph a copy of the signed and dated document back. We won't ask you to come in person, as all of this can be completed over email.

Is there anything else we can do for you in the meantime? I would be more than happy to forward your information to my supervisor and have them call you back later.

Thank you for taking the time today to talk with us and we hope you and your family remain in good health.

MARCH
2020

Emerging Tenants Report



Emerging Tenants Report

March 2020

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Apparel

3

Tenant Name	Ownership	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Allbirds		5,000		NY & CA	7		20	Online footwear retailer. P
Canada Goose		5,000-5,500			4			
Duluth Trading		12,400-25,400			34			Plans are to add an additional 100 locations over the next 5 years.
Fabletics	Private				24			Plans are to expand an additional 75 locations over the next 12 months
Henri Bendel	L Brands				23			9/2018 - L Brands announced closure of all locations including website.
Indochino					22	20		
La Senza	L Brands				11			
Mizzen+Main		1,500-2,000		FL, OK, TX	4	1		Online retailer which is now expanding to B&M
Primark	Private			CT, MA, NJ, NY, PA	10	2		The Irish retailer has 378 locations globally. Plans are to open stores in Florida.
Rebag		1,500		CA	9			Plans are to open an additional 30 physical stores
Rodd & Gunn					8		2	New Zealand-based menswear with 100+ stores in Australia & New Zealand
Roots	N/A	3,500			3	5-7		Company believes the US can support 100 stores.
RYU Apparel					3			Stores located in NYC, Venice (CA) & Newport
Sierra Trading Post	TJX Co.				46			
Simply \$10	Private	5,000	\$200	14 states	41	6		
ThreadUp					2			
Uniqlo					57			Japanese based company; has 57 locations in the US
Untuckit	Private				40			Announced plan to open 100 locations



Childcare

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Children's Learning Adventure	NR	18,000-25,000	-	12 states	42			Target is to expand 100 new locations over the next 5 years
TheCoderSchool	Private			12 states	35			Plans are to open 10 new locations in Atlanta MSA over the next several years.
Crème de la Crème	NR	15,000-21,000	-	8 states	25			

Automotive/Convenience Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Alltown	Private	4,500	-	MA, NH, RI	31			Target is to expand concept by 100 new location over the next 5 years
Fast 5 Xpress Car Wash		1 acre		CA	14		5-10	Focus is LA & Orange County.
Parker's	Private	5,000		GA & SC	64		12	
Rutter's				PA, WV	70			Has more than 20 stores in some phase of construction.
Spinx	Private			South Carolina	81			

Department

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Barney's			-			(15)		8/2019 - Filed for Chpt 11 bankruptcy, with plans to close 15 of its 22 stores.

Discount & Variety Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Daiso					78			Dollar store concept based in Japan. Expanding into NY
Goodwill of Central/Coastal VA	Non-Profit	16,000	-	Hampton Roads & Central Virginia	32			

Health/Fitness/Nutrition

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Big Blue Swim School	Private Equity	8,500-15,000		IL	5			Target is to grow to 21 locations by 2021
Blink Fitness		15,000-20,000	-		70			Target is to surpass 300 locations over the next 5 years.
Fitness Connection	Private Equity			NV, NC, TX	37			
U.S. Fitness	Private Equity	65,000-80,000			46			5/2018 - Recently acquired by Delos Capital

Grocery Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Amazon Go	Public			CA, IL, WA	6			
Big Y	Private	35,000-55,000		MA & CT	71		2-3	Typically grow at 2-3 stores per year
Cardenas Markets	NR			CA, AZ, NV	47			
Dan's Supreme	Private	25,000		NY	9		-	Plans are to remodel 1 store in 2020.
Earth Fare	Private			10 states	50	10	(50)	2/3/20 - filed for bankruptcy & announced it was closing all stores.
Festival Foods	Private			Wisconsin	30			Acquired Gordy's Markets in WI (3 sites) - 7/2017
Fiesta Mart	Private	-	-	Texas	65			Not expanding for the next 18-24 months. 3/2018 - announced that El Super (US Hispanic grocer) is acquiring Fiesta Mart.
Fresco y Mas	NR				22			Plans are to open new locations in Orlando & Tampa (FL)

Grocery Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Fresh Thyme Farmers Market	NR	26,000-30,000	-	10 states	75	(3)		Plans are to operate 100 locations by 2020
H Mart	Private			12 states	66			
Hugo's Family Marketplace	Private			ND & MN	15		1	Company has 10 grocery stores and 5 liquor stores. 1 planned store opening in 2020
Karns Quality Foods	Private	39,000	-	Pennsylvania	9	-		Opening a new store in York, PA in 2020
Kings	NR	-	-	Northeast US	25			Recently acquired by P/E firm GSSG Capital.
Lidl	Private	15,000-35,000	-	DE, GA, NC, NJ, NY, SC, VA	53	27		Has slowed down expansion plans due to slower launch than expected. 11/2018 - acquiring Best Market, which has 27 stores in NY & NJ, of which all will be converted to the Lidl banner.
Lowes Foods	NR			NC, SC, VA	90			
Lucky's Markets	Kroger			13 states	30			Has signed up to 20 leases for new stores slated to open in the next 18-24 months, located in Florida, Colorado, Montana & Ohio.
Market Basket	Private	32,000	-	East Texas, LA	31	1		
Marsh Supermarkets	NR	45,000-65,000	-	IN & OH	44			Filed Chapter 11 Bankruptcy on 5/11/17 - of which an immediate closing of 19 stores
New Seasons Market	Private	-	-	CA, OR, WA	25			
Northgate Gonzalez Market	Private	20,000-80,000		SoCal	41			Continued expansion in SoCal.
Piggly Wiggly	NR	25,000-45,000	-	GA & SC	94			
Price Rite	Private			CT, MA, MD, NH, NJ, NY, PA, RI, VA	64			Part of Wakefern
PriceSmart					41			
Roche Bros.	Private			MA	21	2		
Rouses Markets	Private	34,000-44,000	-	Louisiana	64			
Supermercado	Private			Texas	16			12/2017 - acquired by Albertson's
The Fresh Grocer9	Private			DE & PA	8			Part of Wakefern
Vallarta Supermarkets					50			
Wayfield Foods	Private		-	Georgia	10			Opening up new concept called Eden Fresh Market in Atlanta MSA

Grocery Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Weaver Street Market	Private			NC	4	1		
Wegmans	Private	80,000-120,000	-	MA, MD, NJ, NY, PA & VA	98	3		

Furniture | Home Improvement Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Arhausa Furniture	Private Equity			25 states	65			
Busy Beaver Building Centers	Private	15,000-50,000	-	PA, OH & WV	25		3-5	Focus is on densely populated areas, B & C markets with no big box competitors
Casper Sleep	Public				60			Plans are to grow to at least 200 stores over the coming years.
HOM Furniture	Private	65,000-185,000		MN, IA, ND, SD, WI	17			Opportunistically growing
Restoration Hardware	Public	17,000	\$956	29 states	85	3-5		Believes it has the opportunity to expand to 60-70 locations in the US and Canada in the range of 25,000-60,000 SF
The Container Store	Public	20,000-25,000	\$321	33 states	92			Leases 100% of its footprint. The company believes it can expand its footprint to over 300 locations. Evaluating a smaller footprint targeting smaller markets.
The RoomPlace	Private			Illinois & Indiana	25			
The Shade Store	Private Equity		-		60			8/2018 - being acquired by PE firm Leonard Green & Partners
Wren Kitchens				CT	1		1	UK concept; opening first store in Milford, CT.

Medical

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Carbon Health	Private Equity	2,500-3,500		CA & NV	14		30	Plans are for 50 new clinics in 2021. Focus is on Grocery or Pharmacy anchored centers.
Invisalign				AZ, CO, FL, MA, TX, IL	4			
Physicians Immediate Care	Private	3,200-4,200	-	IL & IN	43	1	6	Target is to grow to 100 locations. Focus is freestanding retail sites at strong intersections; will consider end caps.
Stanton Optical	NR	2,700-4,300			72			
WellNow Urgent Care	Private	3,500-5,000		IL & NY				

Other

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
2nd & Charles	Private	16,000-25,000	-		40			
Amazon Books	Public	-	-	CA, IL, MA, NJ, NY, OR, TX WA	18			New locations are set for Los Angeles, Bethesda & Lone Tree (CO)
Boardroom Salon for Men	Private			TX, GA, TN, OK	30			Plans are to open 7-10 locations in the Phoenix MSA over the next 3-5 years & 62 total over the next 4 years.
Bosco's	Private	195,000		PA, CT, DE, MD, NJ, NY, OH	46			
Erwin Pearl	Private	750-1,000		8 states	10			Exploring expansion in outlet locations
FAO Schwarz	Private Equity			NYC	2	1		Plans are for expansions to be in airports & international locations (London & China)
GoldMax	NR	-	-	Chicago	80			
It'Sugar	Private Equity			26 states	95			Acquired by P/E firm BBX Capital Group
Lego	Foreign				91			Has over 600 locations globally.
Madison Reed	Private			NY, CA	6	16-18		Target expansion is to grow to 40 locations by 2020.

Other

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Mardel	NR	18,000-22,000	-	AR, CO, KS, LA, MO, OK & TX	35			
Mattison Salon Suites	NR			TX (Dallas)	5			Expanding into: Dallas, Phoenix & Charlotte
Quick Quack Car Wash	NR	3,000-3,600		CA, AZ, UT, TX & CO	32			
Rockport	Private Equity				28			Shoe retailer; Filed Chapter 11
Shopko Optical	Private	2,200		WI, MI, MN, UT, ID, IL, MT,	81	81	35	Former Optical Division of ShopKo.
Showcase					9			Canadian retailer; plans are to open
Warby Parker					64			Target is to operate 100 stores by year

Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
7 Leaves Café	Private	1,500-2,400	Fast Casual	CA, NV, TX	30		20	Plans are for 30 new stores in 2021. AUV is \$1.2M.
54th Street Restaurant & Drafthouse			Casual Dining		29			
&pizza	Private	-	Fast Casual		21			
Anna's House Restaurant	Private	-	Casual Dining	Michigan	6			
Another Broken Egg Café	Private	3,000-4,200	Casual Dining	12 states	68			Anticipates growing by 14-18 units per year. Company plans to operate 300 units by 2025.
Artichoke Basille's Pizza	NR		Casual Dining	CA, FL, NY	12			Signed a multi-development deal to bring 12 restaurants in Northern California
Back Yard Burgers	Private Equity	2,500-3,000	Casual Dining	11 states	55			Focus on re-branding efforts & remodeling
Bacon Bros. Public House	Private	4,500	Casual Dining	SC, TX	2			Currently awarded franchises for expansion into Charleston, SC & Charlotte, NC

Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
B. Good	Private		Fast Casual	CT, MA, ME, NC, NH, NJ, NY, ON, PA, RI, VA, VT and Switzerland	58			
Bahama Breeze Island Grille	Darden ⁵	7,400	Casual Dining	-	42			
Barcelona Wine	Private Equity		Fine Dining	7 states	15	3-4		10/2019 - being acquired by L Catterton
bartaco	Private Equity		Fine Dining	10 states	18	6-7		10/2019 - being acquired by L Catterton
Bertucci's	Private		Casual Dining	Northeast & Mid-Atlantic	80			Anticipating to file for bankruptcy.
Board & Brew	Private	1,800-2,400	Fast Casual	AZ & CA	17		3-5	Projects another 3-5 additional locations in 2021 as well.
Bobby's Burger Palace	Private		Fast Casual	9 states	17			
Bombshells	Private	8,700-10,000	Casual Dining	TX	7	3		
Broken Yolk Café		4,800-6,200	Fast Casual	4 states	23			Reported Avg. AUV: \$1.96M
Bubbakoo's Burritos			Fast Casual	NJ	16			
Burger 21	NR	2,000-4,000	Casual Dining	12 states	24			
Café Yumm			Fast Casual	OR, WA	20			Continued expansion in OR
Cheeseburger in Paradise	Luby's	6,800	Casual Dining		1	(1)		
Carbone's Pizza	NR	-	Casual Dining	MN, MT, WI	37			
City Barbeque	Private Equity		Fast Casual	OH, IN, KY & NY	28			
Cooper's Hawk Winery	Private		Casual Dining	10 states	36	5		7/18 - Being acquired by private equity firm Ares Management
CoreLife Eatery	NR		Casual Dining	IL, IN, KY, MI, NC, NY, OH, PA, TN, UT	40			Signed a multi-unit development deal to add 23 locations to the Charlotte/Greensboro/Winston Salem markets
Corky's BBQ	Private Equity		Casual Dining	TN	8			Plans are to grow the footprint by 15 locations over the next 3 years (including TX)
Costa Vida					91			
Cotton Patch Café				AR, NM, OK, TX	55			

Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Cowboy Chicken	NR		Fast Casual	CA, TX, OK, LA, NE & AL	24			Expanding into CA
Curry Up Now	NR		Fast Casual	CA	6			Has more than 50 franchised and corporate locations under development
Eatlay	Private		Fast Casual		5			
J. Alexander's ¹	NR	-	Fine Dining	9 states	19			Merging with Ninety Nine Restaurant & Pub
Stoney River ¹	NR	-	Fine Dining	6 states	12			Merging with Ninety Nine Restaurant & Pub
Redlands Grill ¹	NR	-	Fine Dining	8 states	12			Merging with Ninety Nine Restaurant & Pub
CAVA	NR		Fast Casual	CA, DC, NY, NJ, MD, CT & VA	70			
Crushed Red - Bake & Chop Shop	NR		Casual Dining	Missouri	6			
Del Frisco's Double Eagle ²	Private	6,500-7,200	Fine Dining	10 states	13	2		10/2019 - being acquired by Tillman Fertitta's Landyr's Inc.
Del Frisco's Grille ²	Private		Fine Dining		24	(4)		10/2019 - being acquired by Tillman Fertitta's Landyr's Inc.
Dos Toros	NR		Casual Dining	CA, NY, IL	12			Opening location in Chicago
Duck Donuts			Fast Casual		67			Reportedly has over 140 locations in development
Eat 'n Park	Private	-	Casual Dining	OH, PA, WV	80			
Eddie Merlot's	Private	10,900	Fine Dining	6 states	12			
Eddie V's	Darden ³	9,000	Fine Dining	11 states	22			
EveryTable		500-1,500	Fast Casual	CA	9		12-15	Plans are for 20 new locations in 2021. Prefers end caps.
Fajita Pete's	NR		Casual Dining	Texas	4			Plans are to open 40 restaurant in the next 4 years
Farmer Boy's	Private	2,800-3,200	QSR	CA & NV	89			
Firebirds Wood Fired Grill	Private Equity	6,500	Casual Dining	18 states	43			
Fleming's Prime Steakhouse	Public	7,100	Fine Dining	-	70			AUV is \$4.5M/store

Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Fogo de Chao	Private Equity	8,000-8,500	Fine Dining		47	5-7		Sold to Rhone Capital for \$560M in Feb '18
Osteria del Fornaio	Private	3,000-3,500	Fine Dining				1	Opening first location in 2020.
Foxtail Coffee	Private		QSR	Florida (Orlando)	4			
Fuddruckers	Luby's	5,000-7,000	Casual Dining		57	(3)		
Glory Days Grill	Private		Casual Dining	MD, WV, VA, NC, FL	36	3		
Honeygrow	Private	2,000-2,700	Fast Casual		13			
Hot Head Burritos	Private		Fast Casual	FL, IN, KY, MI, OH and PA	77			
HOT N JUICY CRAWFISH	Private		Casual Dining	AZ, CA, DC, FL, NV, NY and VA	12			
HuHot Mongolian Grill			Fast Casual		65			
Hyde Park Prime Steakhouse	Private	5,000-8,000	Fine Dining	Midwest, MidAtlantic, MidSouth, Southeastern	18	1		Ideal locations are 2nd generation free standing building in dense suburbs (high-income areas) of metropolitan markets / medium to larger cities
Il Fornaio	Private	5,500-7,500	Fine Dining	CA, CO, WA, NV	19			
Jet City Pizza	Private		Fast Casual	Washington	6			
Jim 'N Nick's BBQ	Private Equity	5,800	Casual Dining	AL, CO, FL, GA, NC, SC, TN	36			Acquired by Roark Capital 7/2017.
Joe's Crab Shack	-	8,000	-	31 states	75			Ignite Restaurant Group filed Chpt 11 bankruptcy; acquired by Landry's; likely to close 15 additional locations.
Kneaders Bakery & Café	Private	3,800-4,000	Casual Dining	ID, NV, AZ, UT, CO, TX	56			
Kona Grill	NR	6,500-7,500	Casual Dining	20 states	33			8/2019 - Filed for Chapter 11 Bankruptcy
Kura Sushi				CA, GA, IL, TX	21			
La Boulangerie Boul'Mich		1,500-2,500	Fast Casual	Florida	5		1	
Lazy Dog Restaurant & Bar	Private	8,000	Casual Dining	CA & TX	22			
Leon			QSR					UK healthy fast foot chain; opening 2 locations in Wash DC this year

Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Luby's	Public	9,800	Casual Dining		82	(2)		
Maggiano's Little Italy	Brinker	12,000-17,000	Casual Dining	-	53	1		AUV is approximately \$7.9M/store
Maple Street Biscuit Co.	Private			FL, GA, NC, TN, SC	25			
Melt Shop	Private		Fast Casual	NY, PA & MN	8			Signed a multi-unit development deal to add 18 locations in PA, NJ & DE. Plans are to grow to 100 locations worldwide during the next 5 years
Miami Grill	Private Equity	2,400-3,000	Fast Casual	FL, HI, IN, SC	31			AUV: \$1.8M
Mixt		1,800-3,000	Fast Casual	AZ, CA & TX	16		6	Plans are for 10-12 new stores in 2021.
Mo'Bettahs	Four Foods		Casual Dining		6			Acquired by Four Foods Group in July '17
MOOYAH Burgers Fries Shakes	Private			18 states	84			
Movita Juice Bar		1,100-1,400	Fast Casual	CA	9		5-6	Plans are for 5-6 new locations in 2021.
Mulligan's Beach House Bar & Grill	Private		Casual Dining	Florida	6			20% concept growth in 1 year
Native Grill & Wings	Private	-	Casual Dining	6 states	31			
Newk's Eatery	NR	4,700	Casual Dining	13 states	96			Approx. 85% of restaurants are franchised.
Panini Kabob Grill		3,500-4,500		CA	20		12	Plans are for 12-20 additional locaitons in 2021-2022. AUV is \$5.2M with 52% takeout.
Paris Baguette		1,800-2,500	QSR		47			
Pepper Jax Grill	NR		Fast Casual	SD, ND, KA, MO, IA	41			
Pie Five	Public	1,800-2,400	Fast Casual	19 states	84			
Pizza Hotline	N/A	800-1,500	Fast Casual	Canada	24	0	10	All locations are in Canada
Pizza Patron	NR	-	QSR	-	93			
Pollo Campero	NR		QSR		80			Plans are to double restaurant count in the next 3 years.

Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Pret A Manger	Private Equity	-	Fast Casual		92			Company operates 530 locations worldwide (including US locations). 5/2018 - Recently being acquired by JAB (owner of Panera, Peet's, Krispy Kreme, etc.)
Primo Hoagies	NR		Fast Casual	7 states	90			
Quaker Steak & Lube	TravelCenters	4,000-8,700	Casual Dining	13 states	41			
RibCrib	Private	-	Casual Dining	8 States	60			
Rock & Brews					19			
Roy Rogers	Private	2,750-3,500	Casual Dining	6 states	48			50% units are corporately owned. Actively expanding via area development territories, 3 to 4 per year throughout the Mid-Atlantic and in select Southern states and Midwest markets.
Sarabeth's Kitchen	Private		Casual Dining	NY	16			23% concept growth in 1 year
Seasons 52	Darden ³	9,300	Fine Dining	-	45			
Shell Shack			Casual Dining	TX	8			
Silverlake Ramen		1,700-2,200			9		10	Current focus is North Cal, San Diego, Orange & LA County.
Smokey Bones	Private Equity		Casual Dining	16 states	66			
Snap Kitchen	NR	900-1,200	Fast Casual	TX, Chicago (IL), Phil (PA)	50			Plans are for 15 locations per year - targeted markets are Washington DC & NYC
Snooze Eatery	N/A	3,800	Casual Dining	5 states	40		12	Currently active in TX, AZ, CA, CO, MO, NV, NC, SC & FL
Sullivan's Steakhouse ²	Public		Fine Dining	14 states	16			9/2018 - Del Frisco's is selling Sullivan's to Romano's Macaroni Grill for \$32M
Sweetgreen	Private Equity		Fast Casual		97			Continued expansion into Miami, Denver & Austin in 2020
Texas de Brazil	NR		Fine Dining		48			
Texas Tea	Private	1,200-2,300	QSR	TX	3			Plans are to grow 5-10 stores throughout Texas in the next 18-24 months. AUV = \$800,000

Restaurants

15

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
The Brass Tap	Private Equity				41			7/2017 - acquired by PE Group CapitalSpring
The Capital Grille	Darden ³	10,700	Fine Dining	-	59			
The Greene Turtle	Private		Casual Dining		32			
The Lost Cajun				CO, SC, TN, TX	18			Expansion into NC
Thirsty Lion	Private		Casual Dining	AZ, CO, OR, TX	8			
True Food Kitchen	Private		Casual Dining	10 states	23			Plans are to double store count over the next 3 years, with focus areas in NY, NJ & NC
Twin Peaks	NR	5,500-10,000	Casual Dining	24 states	80			Nearly 100 units in the development pipeline
Uncle Maddio's Pizza Joint	NR	2,400-3,200	QSR	Southeast Primarily	34			Free-standing, end-cap preferred; In-line within dense markets
Walk-On's Bistreaux & Bar			Casual Dining	AL, FL, LA, MS, TN, TX	13			Targeting 25 new locations per year
Yard House	Darden ³	11,200	Casual Dining	-	79			AUV: \$8.3M
Zero's Mr. Submarine	Private		QSR	NC, TN, VA	29			12% concept growth over 1 year
Ziggy's Coffee				Colorado	11			
Zoup! Fresh Soup Co.			Fast Casual		77			AUV: \$630K

1 - All operated under J. Alexander's Holdings, Inc.
 2 - All operated under Del Frisco's Restaurant Group
 3 - All operated by Darden Restaurants, Inc.

Sporting Goods

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
5.11	Private	3,800-5,500	-	26 states	66			
Bass Pro Shops	BB-	35,000-300,000	-	Nationwide	78			Cabela's Acquisition Approved - closing set for 3rd Qtr 2017
Cabela's	NR	50,000-70,000	\$327	36 states	85			Ultimate buildout will be 225 stores in the US & Canada.
Club Champion		3,000			38	15		
Field & Stream	Dick's			16 states	27		-8	
Golf Galaxy	Dick's	13,000-18,000		32 states	95			
Orvis	Private				80			
PGA Tour Superstore	Private	-	-	16 states	41	6	3	Target is 50 locations by the end of 2020
Pure Hockey	NR				53			
Scheels	NR	200,000+	-	10 states	26			
Sportsman's Warehouse	Public	15,000-30,000	\$235	23 states	92			Believes the US can support 300 locations. 10/2019 - acquiring 8 Field & Streams from Dick's Sporting Goods and will rebrand as Sportsman's.

Theatres/Entertainment

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion	Growth Plans
Alamo Drafthouse				AZ, CA, CO, FL, MN, NY, TX	36			
Altitude Trampoline Park		25,000-40,000		28 states	69		39	Has 39 locations identified as "Coming Soon" on website.
B&B Theatres					50			
Flix Brewhouse	Private	35,000-40,000	-	TX, IA, NM, IN	4			Plans are to grow to 15 locations in 5 years
Harkins Theatres					33			
KidZania	Private	80,000		TX	1	1		Opening Dallas location in 2019; Chicago 2020 and sites are being evaluated in NYC & Los Angeles
Launch Trampoline Park	Private	25,000-45,000		13 states	20	10-15		
Main Event Entertainment	Private	50,000	-	12 states	27		7-10	Plans are to grow 7-10 locations per year
Malco Theatres, Inc.					34			
Marcus Theatres					68			
Metropolitan Theatres	Private	35,000-55,000		CA, CO, ID, UT	18	1	1	One projected theatre opening in 2021
National Amusements, Inc.					29			
Pinstripes	Private	30,000		OH, IL, DC, KS	10			Has initial goal of 100 locations. In 10/2019, Simon Property Group acquired a minority stake in the business.
Punch Bowl Social	Private Equity			12 states	17	5	11	Plans are to open 11 additional locations by 2020. 7/2019 - Cracker Barrel invested \$140M in a non-controlling stake in the company.
Round1 Bowling & Amusement	Private	40,000-60,000		21 states	30	10-15		
Southern Theatres					44			
TopGolf		65,000			52	11		
Urban Air	Private	30,000-60,000			50	100		

The background of the slide features a blue-tinted image of two men in business suits. The man on the left is looking down at a tablet held by the man on the right. The man on the right is wearing glasses and looking at the tablet. The entire image is overlaid with a complex geometric pattern of white lines and dots. Various white icons are scattered across the background, including a person icon, a telephone, a globe, a shopping cart, a bar chart, a line graph, a padlock, a game controller, a location pin, and a mail envelope. The text 'REAL ESTATE' is in white and 'CONTACTS' is in black, both in a bold, sans-serif font.

REAL ESTATE **CONTACTS**

Contacts

Retailer	City	State	Contact	Phone	Email	Territory
7 Leaves Café			Sonny Nguyen	714.622.0157	sonny@7leavescafe.com	
Alltown	Waltham	MA	Rich Crisci	339-222-3968	richard.crisci@globalp.com	
Anna's House Restaurant		MI	Roger Grandquist	616-426-9293	roger@annashouseus.com	
2nd & Charles			Bonnie Thompson	205-909-0932	thompsonb@booksamillion.com	
J. Alexander's	Nashville	TN	Rob Miles	615-269-1900	rmiles@jalexanders.com	3 Concepts: J. Alexander's, Redlands
Bacon Bros. Public House			Kristian Poole		kristian@baconbrothersfoodgroup.com	
Bass Pro Shops/Cabela's	Springfield	MO	Steve Krajewski	308.255.2562	skkrajewski@basspro.com	
Big Blue Swim School		IL	Nate Minnis		nate@lfivecapital.com	
			Rowena Zar		rowena@lfivecapital.com	
Blink Fitness	New York	NY	Bill Miller	917.292.5649	bill.miller@blinkfitness.com	
Board & Brew			Jacob Clemons	720-810-7159	jclemmons@boardandbrew.com	
Boscov's	Reading	PA	Jacob Stein	610-370-3808	jstein@boscovs.com	
Busy Beaver Building Centers	Pittsburgh	PA	Joseph Kallen	412-828-2323 x70001	jkallen@busybeaver.com	Chairman & Chief Executive Officer
Carbon Health			Soctt Cheeseman	510.255.2919	scott@carbonhealth.com	
Children's Learning	Phoenix	AZ	Dan Petersen	602-707-6989	dpetersen@childrenslearningadventure.com	
Cowboy Chicken			Kip Kolow	508-341-5693	kkolow@cowboychicken.com	Chief Strategy Officer
Dan's Supreme			Richard Grobman		rgrobman@danssupreme.com	
Del Frisco's Restaurant	Dallas	TX	Bill Martens	469-913-1851	bmartens@dfrg.com	Chief Development Officer
Eat 'N Park	Homestead	PA	William Bates	412-476-2494	wbates@eatnpark.com	
Eddie Merlot's	Ft. Wayne	IN	Dave Cook	260-434-0055	daveinind@aol.com	
EveryTable			Mark Seferian	714.337.2026	marksef@everytable.com	
Erwin Pearl			Steve Cantwell	212-889-7410	scantwell@epearl.com	Director- Retail Stores
Farmer Boy's	Riverside	CA	Joyce Dery	949-680-8281	jdery@farmerboys.com	Director of Real Estate
			Joe Mineo		jmineo@farmerboys.com	California (Inland Empire)
Fast 5 Express Car Wash			Tom Utman	949.275.1858	tutman@fast5xpress.com	
Firebirds Wood Fired Grill	Charlotte	NC	Gerald Pulsinelli	704-944-5180	gpulsinelli@firebirdsrestaurants.com	



Contacts Continued

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Fresh Thyme Farmers	Phoenix	AZ	Justin Haasch		jhaasch@freshthyme.com	
Glory Days Grill			Jim Klavis		jklavis@glorydaysgrill.com	Real Estate Contact
			Mike Halpern		mike@franchisefreeway.com	Franchise Inquiries
Goodwill of Eastern/	Richmond	VA	Ed Mack	804-887-9535	ed.mack@goodwillvirginia.org	
HOM Furniture	Minneapolis	MN	Mike Brady	763-767-3771	mbrady@homfurniture.com	
Hugo's			Scott VanCamp		scott@gohugos.com	Senior Director of Retail Operations
HuHot Mongolian Grill			Jeff Martin		jeff.martin@huhot.com	
Hyde Park Restaurant			Rick Hauck		rhauck@hydeparkgrille.com	
Jim 'N Nicks BBQ	Mongtomery	AL	Jay Williams	813-505-8338	jwilliams@jimnicks.com	
KidZania	Frisco	TX	Gregg Knoop	917-626-4201	gregg@kidzaniausa.com	Chief Development Officer
Kona Grill	Scottsdale	AZ	Marci Rude	480-922-8100	rude@konagrill.com	
La Boulangerie Boul'Mich			Daniel Cohen		daniel@laboulangerieusa.com	
Lego			Patrick Colca	860-749-2291	Patrick.colca@lego.com	
Lidl	Arlington	VA	Michael Merryman	571-982-0081	michael.merryman@lidl.us	
Market Basket			Jim Carter	978-851-8000		Director of Real Estate
Metropolitan Theatres	Los Angeles	CA	Dale Davison	310-858-2843	ddavison@metrotheatres.com	SVP - Operations & Development
Mixt	San Francisco	CA	Julio Guerrero	415.815.8419	julio@mixt.com	
MOOYAH Burgers Fries	Plano	TX	Greg Spalter	714-386-7214	gspalter@mooyah.com	Southern California
Native Grill & Wings			Brad Williams	316-640-5003	brad.w@jobymgmt.com	
Northern Tool & Equipment	Burnsville	MN	Duane Boris	952-895-6809	duane.boris@northerntool.com	National
Orvis	Manchester	VT	Jason Williams	802-362-8826	williamsja@orvis.com	Director of Real Estate
Parker's Kitchen			Nathan Richardson	912-231-1001	nrichardson@parkersav.com	Director of Real Estate
Paris Baguette					tinabui@parisbaguette.com	National
Perfumania	New York	NY	Zachary Hammer	212-878-1630	zhammer@perfumania.com	Director of Real Estate
Physicians Immediate Care	Rosemont	IL	Steve Thayer	847-653-0161	sthayer@visitphysicians.com	Director of Real Estate
Pizza Hotline	Winnepeg	CAN	Jerry Cianflone		gc@pizzahotline.ca	CEO
Pollo Campero			Julio Pellecer	“(972) 770-2829	jpellecer@campero.com	RE Development Manager

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Quick Quack Car Wash			Efrain Corona	916-846-2100	efrainc@dontdrivedirty.com	Development Director
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			Noreen Yeigh	916-380-2022	noreeny@dontdrivedirty.com	Real Estate Manager- Southern CA
Rebag	New York	NY	Michelle Zhao	917-592-3887	michelle@rebag.com	VP of Retail Expansion
Roche Bros	Wellesley	MA	Jim Sperber	781-235-9400x5249	jims@rochebros.com	Director of Real Estate
Rock & Brews			Daniel Evans		daniel.evans@rockandbrews.com	VP of Franchising
Rouses			Charles Merrell	903-534-3264	charles.merrell@rouses.com	Vice President of Real Estate
Roy Rogers			Joseph Briglia	301-695-5051	jbriglia@royrogersrestaurants.com	Director, Real Estate & Franchise Development
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Schnuck Markets	St. Louis	MO	Dave Fontana	314-994-4449	dfontana@schnucks.com	
Shopko Optical	Green Bay	WI	Donna Capichano	920-429-7331	donna.capichano@shopko.com	Vice President Store Development
Smokey Bones	Aventura	FL				
Snap Kitchen	Austin	TX	Bill McCarthy	512-428-4000	bill_mccarthy@snapkitchen.com	
Snooze Eatery			Phil Weick		pweick@snoozeeatery.com	Vice President - Real Estate & Development
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Texas Tea	Amarillo	TX	Brad Williamson	806-322-3366	brad@tbevco.com	
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The Lost Cajun			Richard Leveille, Jr.	985-306-2311	richardl@thelostcajun.com	Chief Development Officer
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Twin Peaks	Dallas	TX	Emily Rankin	972-212-6872	emily.rankin@fbrest.com	
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			Brian Olson	815-705-6105	brian.olson@aspendental.com	Real Estate Director



MEET OUR TEAM

Meet Our Team



Daniel Herrold

Senior Director

Daniel Herrold is a Senior Director in the Tulsa, office, where he has maintained various roles within the firm over his 15 year tenure at SJC. He has led teams that have completed over \$3 billion in transaction volume through his tenure with the firm across all product types. Outside of production, Herrold has played an instrumental role in senior leadership within the firm. In 2008, he successfully launched the firm's first office outside of Tulsa located in Houston, Texas, where he managed the office through its stabilization. In 2010, Herrold was promoted to Executive Managing Director, where he continued the firm's expansion by launching four additional offices located in Chicago (IL), San Francisco (CA), Los Angeles (CA) and Phoenix (AZ).

Herrold migrated back into production in 2013, where he co-founded the firm's first formal practice group – the Corporate Finance Group (“CFG”). CFG's primary focus is providing a range of services specifically to real estate operators & private equity groups, including services such as sale leasebacks, build-to-suit structuring & financing, lease advisory & restructuring & surplus property sales.

- Strategy Development & Execution
- Business Development
- Client Advisory

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Campbell Black

Associate Director

With 12 years of capital markets experience, Mr. Black has executed approx. \$1.8 billion of commercial real estate transactions. He is primarily responsible for originating and executing investment sales transactions throughout the United States with a focus on Single Tenant, Sale Leaseback, and CTL Transactions. He is a member of the Corporate Finance Group, a practice within SJC that focuses primarily on corporate/sponsor owned net lease real estate. Prior to joining SJC, Mr. Black was a member of HFF's Single Tenant Investment Sales team based in Dallas, TX.

- Deal Origination & Execution
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Austin Duff

Associate

Austin Duff is an associate with Stan Johnson Company's Corporate Finance Group based in Chicago, where he specializes in single tenant and multi-tenant retail, office and industrial net lease properties throughout the United States. He is primarily responsible for originating and executing investment sales, sale leaseback and structured capital markets transactions. Austin works with a broad range of investor profiles including private equity funds, REITs, institutional asset managers, corporate occupiers, developers and individual private investors where he provides advisory services regarding all facets of net lease properties.

- Business Development
- Deal Origination
- Transaction Execution

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Donica Webb

Operations Analyst

Donica Webb joined Stan Johnson Company in the fall of 2013. Since joining, she has managed closings for over \$364 million in transaction volume and over 70 unique transactions. Webb is directly responsible for due diligence organization, contract negotiations, and lease reviewing. Webb's team's focus centers on Portfolio Sale Leasebacks, Lease Restructuring, Built-to-Suit, and Renovation or Expansion Capital; the diverse and complex deal structures require tremendous deal cycle management.

- Due Diligence Organization
- Contract and Lease Negotiation
- Closing Management

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beyond traditional brokerage

The Net Lease Authority®

Stan Johnson Company is the largest collaborative team in the net lease industry offering acquisition, disposition, pricing advisory and 1031 exchange services to a wide range of clients throughout the United States. Our specialization has resulted in an extensive network of brokers with insider knowledge and strong relationships – enabling us to efficiently match buyers with sellers. Drawing on a full array of brokerage and advisory services, our professionals create superior solutions for fee simple, ground lease, leasehold, sale leaseback and zero cash flow deals. As a result, we are known as the Net Lease Authority.

Collaboration

Stan Johnson Company operates on an open, collaborative platform in which we share information, trends, systems, processes and one database among all of the firm's brokers. By sharing and leveraging our collective knowledge and strengths, we are able to maximize value and exposure for our clients—a true, thorough, and complete representation of the market, unmatched by our competitors.

Specialization

Stan Johnson Company was founded upon an exclusive focus on single-tenant sales and maintains the largest team of focused single-tenant brokers in the country. As a result, Stan Johnson Company is viewed as the preeminent source of single-tenant knowledge and properties by buyers, fellow brokers and influencers across the country.

beyond experience

Stan Johnson Company consistently monitors all single-tenant investor activity through a proprietary central database system which is shared by all Stan Johnson Company professionals – including advanced analytics such as website downloads and visits. Our national network of professionals' track and share the activity of all active investors historically, in the market and those considering a net lease investment including buyers, sellers, REITs, institutions, private equity, foreign capital, lenders, tax deferred investors (1031, 1033), high net worth private investors, and family offices.

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team of net lease
brokers

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going beyond

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MARCH
2020

Retail & Restaurant Expansion Report



Retail & Restaurant Expansion Report

March 2020

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Apparel

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Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Abercrombie & Fitch	Public	6,800-7,800	\$371	50 states	684	40		Store counts include: 400 Hollister & 284 A&F's
American Eagle Outfitters	Public	3,600-6,600	\$436	50 states	1,095	60-75	60-70	Recent earnings release indicated that the company plans on expanding the Aerie concept by 50-80 new locations (uncertain as to timeframe). Footprint Breakout: American Eagle - 939, Aerie - 109, Tailgate Clothing Co. - 5 & Todd Snyder - 1. Plans are to grow the Aerie brand by 60-70 stores in 2020.
ascena retail group	Public			Nationwide	4,622	(650)		Concepts include: Ann Taylor, LOFT, dressbarn, Lane Bryant, Catherines & Justice. The company intends on closing all 650 Dressbarn locations by EOY 2019.
Athleta	Gap (Public)	4,100		Nationwide	171	10		
Avenue Stores	Private Equity			33 states	222	(222)		8/2019 - closing all locations
Banana Republic	Gap (Public)	8,500	\$376	Nationwide	554			
Carter's	Public	4,200-5,000	\$277	Nationwide	862	14		Concepts include both Carter's & OshKosh. Plans are to close more than 10% of its US outlet stores upon lease expiration.
Cato	Public			31 states	1,301			
Charlotte Russe	Private Equity				130	(550)		2/3/19 - Filed for Chpt 11 bankruptcy, which later announced closure of entire store fleet & total liquidation. Acquired by YM Inc. in 3/2019, and has aggressively reopened stores.
Charming Charlie	Public			38 states	261	(261)		7/2019 - Filed Chapter 11 Bankruptcy (its second in 2 years), of which plans are to close 261 stores by the end of August.
Chico's	Public		\$403		1,421	(83)		Store Breakout: Chico - 679, White House Black Market - 461 and Soma - 281. Closing 250 stores over the next 3 years.
Christopher & Banks	Public	3,810	\$170		484			
CitiTrends	Public	12,500		32 states	562	20		
David's Bridal	Private Equity				300	6	2	Emerged from bankruptcy in January 2019
Destination Maternity	Public	1,800	\$239	50 states	446	(67)		10/21/19 - Filed for Chapter 11 bankruptcy; plans are to "right size its footprint"
Destination XL	Public				333			

Apparel

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Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Express	Public	8,650	\$297		634	(35)	(66)	50% of the US retail store leases have < 3 years remaining. 01/2020 - announced it plans to close 100 stores by 2022.
Forever 21	Private				448	(88)		10/2019 - Filed for Chapter 11 Bankruptcy; plans are to close 88 of its 549 US stores (16%). 2/19/20 - Authentic Brands, Simon Property Group & Brookfield Property Partners acquired Forever 21 out of bankruptcy, and plans to keep open most of the remaining footprint.
Fossil	Public	1,700	\$674		202	(30)		Locations include full price accessory & outlet locations. Plans are to close net 30 stores internationally.
Francesca's	Public	1,000-2,000	\$449	47 states	718	(20)		
Gymboree					900	(900)		1/17/19 - Filed for bankruptcy, with plans to close all Gymboree & Crazy 8 stores & sell its Janie & Jack Brand (139 stores)
The Children's Place	Public	4,630	\$312		972			Plans are to close 300 locations by 2020. Average remaining lease term in the portfolio is 2.5 years. Most locations are located in malls or strip centers.
Lands' End	Public					8-12		Plans are to open 75 locations over the next 5 years
Lululemon Athletica	Public	3,100	\$1,579	44 states	285	15-20		
Maurices	Private Equity			Nationwide	903			5/2019 - Ascena Retail Group sold to British PE firm OpCapita for \$300M
Nine West	Private Equity							July '18 - recently acquired by Authentic Brands Group, which owns 30+ apparel brands in its portfolio.
Old Navy	Gap (Public)	16,600	\$328	Nationwide	1,166	28		
PINK	L-Brands				143			2/20/20 - L Brands is selling Victoria's Secret & Pink to Sycamore Partners
Ralph Lauren	Public				227			
RTW Retailwinds	Public			36 states	428			Formerly called New York & Company.
Ross Dress for Less dd's Discounts	Public	22,000-30,000	\$409	39 states	1,831	98	100	Upped it's long term growth targets to 2,400 Ross stores and 600 dd's Discount stores. 2020 expansion plans include 75 Ross and 25 dd's Discounts locations.
rue21	Public			45 states	758			Emergred from bankruptcy September 2017

Apparel

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Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Stein Mart	Public	34,400	\$123	30 states	283			Jan 2020 - Being taken private by Kingswood Capital Management LP
The Buckle	Public	4,250-5,000		42 states	449			
The Gap	Public	10,400	\$426	Nationwide	733	(28)		
Tommy Bahama					160			
Urban Outfitters	Public	9,000	\$353	Nationwide	509	18		Concepts include: Urban Outfitters (178), Anthropologie (204) & Free People (127)
U.S. Polo Assn.				166 Countries	1,050			Store Count & Expansion Targets Reflects International. Target is to exceed 1,300 stores in a few years. Estimates are around 67 locations in the United States
Vera Bradley	Public	1,900-3,200	\$635	35 states	156		6	Announced it may close an additional 15 stores in 2020.
Victoria's Secret	L-Brands	6,485	\$757	Nationwide	923	(53)		2/20/20 - L Brands is selling Victoria's Secret & Pink to Sycamore Partners

Automotive

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
AAMCO	NR	3,500-8,000	-	-	700			
Advance Auto Parts	Public	6,800-8,000	\$236	49 states	5,037	20-30	20-30	Company leases 84% of its store base. Plans are to close/consolidate 100 locations in 2020
AutoZone	Public	6,800-7,300	\$269	50 states	5,772	150	150	The company owns 49% of its footprint
Big O Tires ¹	NR	5,000-7,500	-	23 states	449	20		Plans are to open 100 locations in the next 5 years. 387 of 389 locations are franchisees
Bridgestone/Firestone	NR	6,000-8,500	-	47 states	2,220	50	50	
CarMax	Public	20,000-40,000	-	41 states	209	15	13	
Discount Tire Company	NR	7,500	-	34 states	1,000	35	35	Target 35 locations/year; national focus
Express Oil Change & Tire Engineers	Private	4,000-8,000	-	16 states	274			
Goodyear	NR	5,000-6,000	-	Nationwide	2,000			
Harley Davidson	Public				691			
International Car Wash Group ²	Private			10+ states	150	20		

Automotive

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Jiffy Lube	NR	1,900-2,400	-	Nationwide	2,200			
Les Schwab	Private			CO, CA, ID, MT, NV, OR, UT, WA	480			Prefers to purchase land (50-75K SF); areas of focus are CO, Central CA & Inland Empire
Mavis Tire Supply	Private	5,000-7,500	-	13 states	345			2/11/20 - Announced it was acquiring 112 retail stores from TCB Corporation
Midas ¹	NR	3,500-6,000	-	Nationwide	1,500+			
Monro Muffler Brake	Public	4,500-6,300	-	26 states	1,098			
NTB ¹	Private	3,500	-	Southeast/Mid-Atlantic	226			Land Req: 0.8-1.0 acres. Immediate growth plans from Virginia to Maine.
O'Reilly Auto Parts	Public	6,800-7,500	\$255	47 states	5,439	200	180	Expansion focus is Northeast, Florida & Mid-Atlantic
Pep Boys	Private Equity	4,000-8,000	\$123	35 states	1,000			
RNR Wheels & Tires	NR	-	-	21 states	100			Expanding into GA & AL
Safelite AutoGlass	Foreign	4,000-8,000		Nationwide	720+			
Take 5 Oil Change	Private Equity			AL, AR, FL, MS, OK, TX	220			Target is 1,000 locations. Only needs 10K SF of land.
Tire Kingdom ¹	NR	3,500-6,000	-	Nationwide	2,100			
Tommy's Express Car Wash							50	Plans are for 100 locations in 2020-2021. Needs 1 acre sites min.
Tuffy Auto Service Center	NR	3,800-6,000	-	16 states	375			
Valvoline Instant Oil Change	Public	2,000-2,200	-	45 states	1,577		40	Approx. 30% are corporately operated locations. Focus is power centers or grocery anchored centers.

1 - Owned by TBC Retail Group (a subsidiary of Sumitomo Corp of America)

2 - Brands include: Car Wash USA Express, Goo-Goo 3 Minute Express & Supersonic

Banks

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Bank of America	A-	3,000-8,000	-	Nationwide	4,579			
BB&T	Public	2,400-5,300	-	15 states	1,900			
Chase Bank	A+	2,500-3,500	-	Nationwide	5,630			Looking to expand in Wash DC, Philadelphia, Boston, NC/SC, Minneapolis, St. Louis, KC, Richmond

Banks

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Fifth Third Bank	Public	3,000-4,500	-	10 states	1,158			2020 focus is on expansion in North Carolina, South Carolina, Florida, Tennessee and Georgia.
KeyBank	A-	-	-	15 states	1,058			Acquiring First Niagara which adds 488 branches in Northeast
PNC Bank	A	3,500-4,500	-	19 states	2,600			New stores planned for South Florida, Midwest
SunTrust Bank	NR	2,500-4,500	-	Nationwide	1,500			Plans are to close 10% of its branches over the next two years.
TCF Bank	NR	4,500-4,800	-	7 states	331			
TD Bank	AA-	2,500-4,000	-	14 states (Eastern US)	1,260			
US Bank	NR	3,000-5,000	-	Nationwide	3,176			
Wells Fargo	A+	-	-	39 states	6,239			

Consumer Electronics Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Apple	Public				270			
Best Buy	Public	20,000-45,000	\$813	50 States	1,008			
Conn's	Public	25,000-50,000	\$288	14 states	130	7		Plans are to grow footprint to "several hundred" stores over the next 5 years. Growth plans are in existing markets in addition to AL, GA & VA.

Childcare

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Goddard School	Private Equity	8,000-8,400	-	35 states	480			
Kiddie Academy	NR	7,000-9,000	-	29 states	210			Plans are to expand to approximately 230 locations, including 94 new franchised locations over the next few years.
KinderCare Learning Centers	NR	9,000-12,000	-	39 states	1,380	15		

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
The Learning Experience	NR	10,000	-	20 states	236	45	40	Expanding into new markets: KS, OK, WA, WI, TN
Primrose Schools	Private Equity	10,000-15,000	-	29 states	400	40		Goal is 480 locations by 2020; Targeting CA, MA, TN, MD, and NJ. Typically requires 1.5 acres min.

Convenience Stores | Fuel

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
7-11	Foreign	1,800-3,600	-	Nationwide	9,815			Chairman stated their goal is to reach 20,000-30,000 stores in North America. 4/2017 - acquiring Sunoco's 1,100 convenience locations for \$3.3B
BP (ARCO/AMPM)	Public	1.0 acre+		CA, WA, OR	507	11		ARCO/AMPM is actively looking in N. California, Oregon & Washington
Casey's General Stores	Public	2,000-4,200	\$526	15 states	2,085	60		Prefers property ownership vs. lease. Owns 95% of footprint
Circle K	Public	3,800-6,000	-	Nationwide	6,172	77	20	Plans are for 20 locations in 2021. Needs 1-3 acres.
Cumberland Farms	Private			8 states	600			8/2019 - being acquired by UK-based EG Group
Kangaroo Express	B+	4,000	-	13 states	1,530			Expanding in AL, FL, GA, NC, SC & TN
Kum & Go	NR	3,400-6,300	-	11 states	433			
Kwik Trip	Private			Wisconsin, Minnesota, Iowa	621	40-50	40-50	Plans are to grow 40-50 new stores annually
Maverik	Private			11 states	300			
Murphy USA Murphy Express	NR	200-2,400	-	26 states	1,491	19	26	Target is 1,400 locations in the next 3 years. Looking for 0.9 - 1.5 acre parcels.
QuikTrip	Private	4,000-5,700	-	11 states	750			Expanding into San Antonio & Austin
RaceTrac	NR	5,000-7,000	-	12 states	700			
Sheetz	NR	4,500-7,000	-	MD, NC, OH, PA, VA & WV	500			Expanding in NC
Speedway				22 States	2,770			
Thorntons	Private	4,400-5,500	-	IN, IL, FL, KY, OH, TN	190			Emphasis in Chicagoland right now
TravelCenters of America	Public			43 states	258			

Convenience Stores | Fuel

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
WaWa	NR	5,000-7,000	-	DE, FL, MD, NJ, PA, VA	720	20-30		Plans are to grow to 400 locations in FL (currently at 200) by 2028 & 10 stores in Washington DC by 2020.
Yesway	Private	-	-	MO, NM, IL, KS, OK, TX	421			Target is to grow to 500 locations over next several years through M&A activity. 10/10/19 - acquiring Allsup Convenience Stores, a 300-unit operator located in TX, NM & OK.

Department Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Belk	Private Equity			NC, VA, WV	200			PE-Sponsor Sycamore is driving expansion strategy for Belk into new markets.
Dillard's	Public	169,000	\$127	29 states	291			Footprint consists of 275 Dillard's and 26 clearance centers, of which they own 90% of its locations totaling 44.1M SF.
J.C. Penney	Public	100,000	\$122	49 states	846	(27)	(6)	Portfolio includes 404 owned properties and 113 locations on ground leases. 2020 focus is lease renewals and mall redevelopment.
Kohl's	Public	35,000-55,000	\$194	49 states	1,155	4		The company owns 35% of its locations. There are 297 freestanding locations. Announced in Jan '18 that it plans to rightsize approximately 300 locations and identify co-tenants to fill the spaces. Announced it will be closing all of its Off/Aisle locations (4)
Hudson Bay Company ³	Public	125,000	\$149	Nationally	356	(20)		Indicated it likely will be closing up to 20 Saks Off 5th Stores.
Macy's ²	Public	100,000-160,000	\$149	44 states	852		(42)	The company owns approximately 43% of its store footprint. Announced plans to close 125 stores over the next three years.
Nordstrom	Public	155,000	\$331	40 states	113	(2)		
Saks Fifth Avenue	Public	100,000		22 states & Canada	39			
Sears	Public	159,000	\$87	50 states	223	(405)	(51)	11/2019 - Announced 51 Sears & 45 Kmart's will close Feb 2020

1 - Concepts include: Beall's, Goody's, Palais Royal, Peebles, Stage and Gorman's Off-Price

2 - Concepts include Macy's, Bloomington's & Bluemercury

3 - Concepts include Hudson Bay, Lord & Taylor, Saks, 124 Off 5th & Home Outfitters

Discount Department Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Burlington	Public	25,000-50,000	\$142	45 states	720	75	80	Target is over 1,000 locations. Leases more than 90% of its footprint. 2020 plans also include closing or relocating 26 stores. It's new footprint size will be roughly 39,700 SF.
Gabe's/Rugged Warehouse	Private	40,000		13 states	107			
Gordman's Stores	-	45,000-70,000	\$114	22 states	48	70 - 80		Filed Chapter 11 Bankruptcy on March 10, 2017. Acquired by Stage Stores, which closed in April '17. Plans are to keep about 50 locations open.
Kmart	Sears	94,000	\$87	49 states	202	(239)	(45)	11/2019 - Announced 51 Sears & 45 Kmart's will close Feb. 2020
Marshall's	TJX Co.	20,000-22,000	\$459	42 States	1,125			TJX Cos plans are to expand TJ Maxx, Marshalls and HomeGoods from 3,700 locations to 5,600 locations.
Nordstrom Rack	Nordstrom	35,500	\$421	42 States				Long term goal is 300 locations by 2020. Target sites are inline power centers locations.
Ollie's Bargain Outlet	Public	33,000	\$126	25 states	345	42	42-44	Potential to grow store count to approximately 950 locations. Plans are to open 10-12 new stores in Texas in 2020
Target	Public	20,000-200,000	\$286	50 states	1,853	30	36	Owens 83% of its stores. Plans are to open 30 small format stores each year over the next several years. Currently operates 100 small format stores (as of Sept '19). Plans are to remodel 300 stores in FY 2020. Plans are to test a smaller 6,000 SF convenience-store concept.
T.J. Maxx	TJX Co.	20,000-22,000	\$459	Nationwide	1,271			TJX Cos plans are to expand TJ Maxx, Marshalls and HomeGoods from 3,700 locations to 5,600 locations.
Walmart	Public	69,000-260,000	\$428	49 states	4,769	10		Total Footprint includes all banners.

Discount & Variety Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
99 Cents Only	Private Equity	10,000-25,000		CA, TX, AZ & NV	391			75% of the store base is located in California
Aaron's	NR	3,500-8,000	-	48 states	1,528			63% of locations are corporately operated vs. franchised.
Big Lots	Public	30,000-35,000	\$118	47 states	1,420	50	40	Leases 96% of its footprint. Approximately 460 leases are set to expire over the next 2 years, and the company indicated it could close as many as 50 existing locations over the next several years via lease expirations. Expansion numbers reflect relocations as well.
BJ's Wholesale Club	Public	63,000-150,000	\$561	16 states	217	3-4		Went public 6/29/18. Plans are to open 15-20 new locations over the next five years.
Costco	Public	150,000-160,000	\$1,201	40 states	546	15		About 80% of footprint is owned by Costco. Storecount reflects US & Puerto Rico only.
Dollar General	Public	6,000-12,000	\$231	44 states	15,370	975	1,000	Potential opportunities for 13,000 new stores. 70% of its store base serves communities < 20,000 population. 40-45% of new openings will be rural areas with a new focus for prospects in urban locations. 75% of the US population lives within 5 miles of a Dollar General. Plans in 2020 include: 1,500 store remodels and 80 store relocations.
Dollar Tree	Public	8,000-10,500	\$158	48 states	7,447	350		Company believes the US can support 10,000 Dollar Tree locations nationwide.
Family Dollar	Public	8,000-10,000	\$152	46 states	7,815	200		Company believes the US can support 15,000 Family Dollar locations nationwide. Plans are to renovate 1,250 stores to its "H2" format in 2020.
First Cash	Public	5,000-10,000	-	24 states	1,094	80-85		
Five Below	Public	7,500-8,000	\$288	36 states	833	150		Continued focus on expansion throughout Southern California. The company believes it can support 2,500 total stores in the US
Fred's	Public	8,000-16,500	\$250	15 states	80	(393)		10/2019 - Filed for Chapter 11 bankruptcy; plans are for full liquidation and closure of all remaining stores.
Goodwill Industries	Private	18,000-35,000	-	Nationwide	3,200			
Sam's Club	Public	71,000-191,000	\$649	44 states	597			
Shopko	Private Equity	15,000-35,000	-	26 states	375	(289)		1/2019 - Filed for Chpt 11 Bankruptcy, of which it announced it was closing 38 stores. Later announced on 2/8 that it is closing an additional 251 stores.

Health | Fitness | Nutrition

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
9Round Kickbox Fitness	Private	1,200-1,500	-	41 states	697			
24 Hour Fitness	B	28,000-42,000	-	Nationwide	420			Focus is in CA, CO, MD, NY, OR, VA, WA & DC
Anytime Fitness	NR	2,500-5,000	-	Nationwide	2,250			Plans are to expand throughout Upstate New York
GNC					5,900	(300)		Most planned closures are to occur in mall locations, which account for 28% of GNC's mall base. Total planned closures over the next few years is 900 stores.
Gold's Gym	NR	8,000-45,000	\$2.4M (AUV)	38 states	675			200-300 new openings in next 3 years in US and abroad
LA Fitness	Private	25,000-37,000	-	32 states	700+			Targeting: AZ, CA, FL, GA, IL, IN, KY, LA, MD, MI, MN, NJ, NY, NC, OH, OR, PA, RI, SC, TN, TX, VA, WA
Lifetime Fitness	Private Equity	70,000-143,000	-	24 states	110			
Orangetheory Fitness	Private Equity	2,600-3,400	-	45 states	901			97% of locations are franchisee operated
Planet Fitness	Public	15,000-30,000	-	50 states	2,002	225	250+	95% of locations are franchised. The company believes they can sustain more than 4,000 stores in the US and has plans to open 500 stores in the next 3 years
Powerhouse Gym	Private	20,000-60,000	-	39 states	300	50		Plans are to expand 200 locations over the next 4 years.
The Vitamin Shoppe	Public	2,500-4,000	\$429	45 states	750			8/2019 - Being acquired by Liberty Tax for \$208M
UFC GYM	NR	10,000-40,000			140			More than 300 commitments for new locations
Crunch Fitness	NR	17,000-30,000		24 States & 5 Countries	270	80		More than 500 commitments for new locations. 7/2019 - Being acquired by private equity firm TPG Growth. Plans are to double footprint count to +/-600 locations over the next 5 years.

Grocery Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Albertsons ¹	Private Equity	18,000-72,000	-	35 states	2,261	14	16	Prototype is 50,000 SF. Focus in 2020 is continuing ongoing strategy of looking in and working towards portfolio optimization of our current store base by implementing change for profitable stores through remodels, lease and continuing to monitor/closing of underperforming stores
Aldi	Private	17,000-22,000	-	36 states	1,975	125	110	Target is 2,500 total locations by 2022, with major focus in Florida, East Coast & Southern California. Plans are to remodel 1,300 stores by 2020, spending over \$5B. 2020 plans also include 20 relocations & 175 remodels.
Brookshire Grocery Company	Private	15,000-45,000	-	AR, LA & TX	177			
Food City				GA, KY, TN, VA	130			
Food Lion ³	NR	24,000-85,000	-	15 states	1,030			Focusing on remodeling effort, having remodeled >60% of its fleet over the past four years.
Giant Eagle	NR	12,000-150,000	-	PA, OH, WV & MD	415			Concepts include Giant Eagle (201), Market Districts (13), Giant Eagle District Express (3) & GetGos Fuel (198)
Giant Food Stores ³	Foreign	-	-	PA, MD, VA, WV	181	5		Exploring smaller banner called "Giant Heirloom Market" which targets urban infill locations @ +/- 10,000 SF.
The Grocery Outlet	Public	15,000-20,000	-	CA, ID, NV, OR, PA & WA	337		40	The company is currently focused primarily on growing stores in Southern California, after which it will turn to the Mid-Atlantic. Indicated they can grow their store count 10% annually and believes the US could eventually support 4,800 stores. Focus is 44 new locations in 2021
H-E-B Grocery	Private				321			
Hy-Vee Food Stores	Private	95,000-100,000	-	IA, IL, KS, MN, MO, NE, SD & WI	245	4		They lease approximately 50% of their footprint. Continued expansion of its Fast & Fresh format
Ingles Markets	Public	57,000	\$362	GA, NC, SC, TN, VA, AL	198			

Grocery Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
The Kroger Co. ²	Public	20,000-135,000	\$563	35 states	2,796			Company leases 58% of its footprint, however current strategy is to self-develop and/or own its real estate.
Lowes Foods		50,000		NC, SC, VA	100			
Meijer	NR	39,000-250,000	-	IN, IL, KY, MI, OH, WI	245			Plans to open 6 smaller-format stores in urban locations at roughly 39,000 SF. Close to 50% of its store fleet is located in Michigan.
Natural Grocers by Vitamin Cottage	Public	14,000-25,000	\$358	19 states	153	6	5-6	Company believes US market can sustain 1,100 stores nationally, including 200 stores in the states currently in.
Price Chopper	NR	30,000-60,000	-	6 States (Northeast)	136			Current focus is remodeling effort on entire footprint
Publix	Public	20,000-61,000	\$633	AL, FL, GA, NC, SC, TN, VA	1,243			The company owns 400 locations (including 74 on a ground lease). Preference is to own it's real estate of which it has acquired 65 centers since 2011.
Raley's ⁵	NR	50,000-60,000		CA, NV	128			
Save-A-Lot	NR	12,000-18,000	\$216	35 states	1,230			Company was sold to Onex. Corp (1/2017). Closing all CA & NV store locations.
Schnucks	NR	30,000-80,000		IA, IL, IN, MO & WI	116	(4)		
ShopRite ⁹	Private	45,000-70,000	-	CT, DE, MD, NJ, NY, PA	283			Growth opportunities sought in CT, DE, MD, NJ, NY & PA
Smart & Final ⁸	Public	25,000-30,000	-	AZ, CA, ID, NV, OR, WA	323			94% of the footprint is located in California
Southeastern Grocers ⁶	Private	20,000-65,000		AL, FL, GA, LA, MS, NC, SC	582	(22)		Emerged out of Chapter 11 Bankruptcy in June 2018.
SpartanNash ⁷	Public	42,000	\$310	ND, SD, NE, MN, IA, WI, MI, OH	140	21		11/2018 - acquired Martin's Super Markets - 21-store owned grocery operator located in IN & MI - expected to close 1st qtr 2019.
Sprouts Farmers Market	Public	20,000-30,000	\$572	22 states	340	28	22	Company believes it can support 1,200 stores in the next 15 years. Current focus is Florida, Washington, South Carolina & Mid-Atlantic region. Evaluating smaller footprint of 20,000 SF.
Stater Bros Markets	Private	44,000	-	Southern CA	170			

Grocery Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Stop & Shop ³	NR	35,000-70,000	-	CT, MA, NH, NJ, NY & RI	400			
SUPERVALU ⁴	Private	-	-	MN, VA, ND, MO, IL, MD, DC	114			10/2018 - acquired by grocery wholesaler United Natural Foods which will result on SuperValu's exit from its grocery retail business. Unsure when the retail footprint will be sold off, however the company is currently selling off its corporately owned and operated real estate (i.e. 59 stores)
The Fresh Market	Private Equity	18,000-23,000	\$476	22 states	159		-	
Tops Markets	Private	30,000-70,000		3 states	164			11/2018 - emerged from Chpt 11 bankruptcy, of which 10 stores were closed.
Trader Joe's	NR	11,000-14,000	-	41 states	483		3	
Walmart Neighborhood Market	Walmart	28,000-65,000	-	36 states	800			
Weis Markets	Public	8,000-71,000	\$358	DE, MD, NJ, NY, PA, WV, VA	202			Standard prototype is 65,000 SF.
Whole Foods	Amazon	40,000	\$883	42 states	475			Plans are to convert all 12 Whole Foods 365 into Whole Foods by the end of the year.
Winco Foods	Private	95,000	-	9 states	122			Expanding into Montana

1 - Trade names include Amigos, United Express, Randalls, Albertson's, Safeway, Tom Thumb, Pavillions, Shaws, Acme, Star Market, Carrs, Market Street, Vons, Jewel Osco, Albertson's Market, United Supermarkets, Lucky, Super Saver

2 - Trade names include: Baker's, CityMarket, Copps, Dillons, Foods Co, Food4Less, Fred Meyer, Fry's, Gerbes, Harris Teeter, JayC, King Soopers, Kroger, Mariano's, Metro Market, Owen's Pay Less, Pick 'n Save, QFC, Ralphs, Ruler Foods, Scott's, Smith's

3 - Part of Ahold Delhaize

4 - Trade names include Cub Foods, Farm Fresh, Hornbacher's, Shop 'N Save & Shoppers

5 - Banners include: Raley's Supermarkets, Bel Air Markets, Nob Hill Foods & Food Source

6 - Banners include Bi-Lo, Harveys, Winn-Dixie and Fresco y Mas

7 - Banners include: Family Fare Supermarkets, D&W Fresh Market, VG's Grocery, Dan's Supermarket & Family Fresh Market

8 - Banners include Smart & Final, Smart Foodservice Warehouse, Smart & Final Extra! & Cash & Carry

9 - Part of Wakefern Food Corp - of which trade names include ShopRite, Price Rite, The Fresh Grocer & Dearborn Market



Drug Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
CVS Pharmacy	Public	12,900-14,600	\$1,079	49 states	9,895	100	50	CVS Owns approximately 5% of their footprint. Store count includes approximately 1,725 pharmacies located in Target locations. The company plans on closing 75 locations in 2020.
Rite Aid	Public	10,559-14,608	\$464	16 states	2,463			62% are freestanding locations, and they lease 95% of their footprint.
Walgreens	Public	8,000-15,000	\$723	50 states	9,277	(200)		Walgreens leases 86% of total retail stores. Approx. 78% of the US lives within 5 miles of a Walgreens. Plans are to roll out 20-30 smaller format stores for urban locations.

Furniture | Home Furnishings

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
American Freight Furniture	Private Equity			29 states	153			
Art Van Furniture	Private Equity		-	9 states	176		(176)	2/2020 - announced it was closing all of its namesake stores in connection with its Chpt. 11 bankruptcy.
Ashley Furniture	NR	30,000-35,000	-	50 states	700			Mix between corporately operated and franchise operated is about 600 franchisee/100 corporate.
Badcock Home Furniture & More		18,000-24,000	-	8 states (Southeast)	300			
Bath & Body Works	L Brands	3,200	\$692		1,637	18	70	Most of store openings are to be in strip centers, of which 45% of the total fleet are not in enclosed malls. Actively renegotiating short term leases & will be evaluating potential store closures or relocations in FY 2020. Also refreshing over 160 of its most profitable and highest volume locations prior to 2019 Holiday season. Store Count: 993 Bed Bath & Beyond, 277 under World Market Cost Plus World Market or Cost Plus, 126 buybuy Baby, 81 Christmas Tree Shops and 55 Harmon stores. The 60 targeted closures include 40 BB&B and 20 other concept stores.
Bed Bath & Beyond, Inc. ¹	Public	20,000-75,000	\$264	50 states	1,534	(14)	(40)	
Bob's Discount Furniture	Private Equity				119		4	
Ethan Allen	Public				182			

Furniture | Home Furnishings

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
FFO Home	Private Equity			AR, MO, OK, KS, TN, TX		14		
Haverty's	Public	35,000	\$184	16 states	122	3		
HomeGoods	TJX Co.	20,000-22,000	\$341	48 states	807			TJX Cos plans are to expand TJ Maxx, Marshalls and HomeGoods from 3,700 locations to 5,600 locations
Innovative Mattress Solutions (Mattress Warehouse, Mattress King & Sleep Outfitters)	Private	4,000-6,000	-	AL, IN, KY, OH, TN, WV	175			
Kirkland's	Public	7,000-10,000	\$176	35 states	418	20-25		Long term goal is 500 units. Expansion # reflects YTD openings.
La-Z-Boy	Public	15,500-20,500	\$183	Nationwide	352			
Mattress Firm	B+/Stable	3,200-4,200	\$251	48 states	3,400	(799)		10/2018 - filed bankruptcy, announcing the closure of 799 stores. 11/2018 - emerged from Chpt 11 - plan of reducing footprint size to 2,600 stores in the US as planned.
Pier 1 Imports	Public	8,000-10,000	\$181	Nationwide	951	(70)	(450)	Feb 2020 - filed for Chpt 11 bankruptcy, of which it announced it would close 450 locations.
Rent-A-Center	Public				2,287			6/2018 - Being acquired by Vintage Capital Management for \$1.37 billion, which will take the company private.
Sleep Number	Public				594			
Slumberland Furniture	NR	25,000-40,000	-	12 states	125			Currently doing mostly repositioning of assets.
Tuesday Morning	Public	12,000-15,000	\$115	40 states	726			
Williams Sonoma ²	Public	6,600-13,900	\$318	43 states	601			Plans are to also close as many as 80 stores over the next 3 years.

1 - Trade names include Bed Bath & Beyond, World Market, buy buy BABY, Christmas Tree Shops & Harmon
 2 - Trade names include Williams Sonoma, Pottery Barn, Pottery Barn Kids, West Elm, Rejuvenation

Home Improvement Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
84 Lumber					247			
ABC Supply	Private			49 states	725			
Ace Hardware	NR	6,000-25,000	-	Nationwide	4,423			
Floor & Décor	Public	65,000-75,000		28 states	113	20		Believes it can grow to 400 store nationwide over the next 15 years.
Harbor Freight Tools	Public	13,000-18,000	-	48 states	1,025	95	100	
Hobby Lobby	Private	55,000-60,000	-	46 states	897	60	55	2019 plans also include 8 relocations and 8 store expansions.
Home Depot	Public	135,000	\$449	50 states	1,984	1	3-5	Company owns 90% of their retail properties.
Lowe's	Public	94,000-132,000	\$314	50 states	1,820	(20)		Company owns 80% of their properties.
Lumber Liquidators	Public	6,500-7,500	\$412	46 states	409			
Menards	Private			14 states	305			
Northern Tool + Equipment	Private	20,000-22,000	-	22 states	114	6-8	6-8	Areas for Expansion: FL, GA, IA, IL, IN, LA, OK, TN, TX, VA, WI. Expansion plans for 2021 include MI, OH & KY
Orscheln Farm & House	NR	25,000-50,000	-	9 states	165			
Sherwin-Williams	Public	3,500-5,500	\$630	Nationwide	4,727	80-100	100	# of Stores reflect "Americas" store count.
The Tile Shop	Public	15,000-30,000	\$125	31 states	140			
Tractor Supply	Public	15,000-27,000	\$271	49 states	2,024	80	80	Sees support for upwards of 2,500 stores nationwide. Company leases 94% of existing store base & 55% of its stores are located in freestanding buildings.
United Rentals	Public			49 states	1,075			

Medical

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Aspen Dental	Private	3,500-3,600	-	40 states	800+			Looking for: Prime retail visibility, including maximum storefront and pylon signage opportunities, strong traffic counts, easy access and ample convenient parking
DaVita Dialysis	Public	7,000-9,000	-	Nationwide	2,664			
Fresenius Medical Care	Public	5,900-8,500	-	Nationwide	2,277			
Heartland Dental	NR	3,000-4,000	-	26 states	700+			Looking for: free standing locations; grocery anchored centers; 2nd generation banks or new end-caps
MedPost/CareSpot (Urgent Care)	Private	2,500-3,500	-	AZ, CA, FL, MI, TX, AL, GA, TN	106	16		Prefers grocery-anchored multi-tenant outparcels
Pacific Dental	NR	2,800-3,200	-	21 states	718	95		
The Joint Chiropractic		800-1,400		30 states	517			

Office Supply Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Office Depot	Public	4,000-15,000	\$150	45 states	1,307	(54)	(45)	Plans are to close 90 total stores in 2020 & 2021.
Staples	Public	3,600-20,000	\$234	Nationwide	1,131			

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
AT&T	A-	600-3,200	-	Nationwide	2,500			10/2018 - announced plans to add 1,000 new stores (including pop-up stores)
At Home	Public	75,000-165,000	\$59	39 states	218	33	21	Believes it has potential to grow to 600 stores in the US. The company is slowing down its expansion and will continue at about a 10% rate each year.
Barnes & Noble	Private	14,000 - 26,000	\$212	50 states	627	(5) - (10)		Focus is on lease maturities (110 annually over the next 5 years). 7/2019 - being acquired by Elliot Management Corporation which will be taking the company private.
Batteries + Bulbs	Private Equity		-	48 states	696			
BevMo!	Private	10,000-12,000	-	AZ, CA, WA	166	-		Continued focus on expansion throughout California
Bluemercury	Macy's				160			
Books-A-Million (BAM!)	NR	7,500-10,000	-	32 states	260			Sites need to be outside of 10 miles from nearest Barnes & Noble.
Card\$mart		2,000-2,500		29 states	181			
Claire's								10/2018 - emerging out of bankruptcy
Cost Plus World Market	Bed Bath & Bey			39 states	280			Plans are to also close 40 stores in their current FY, of which most will be Bed Bath & Beyond stores.
Great Clips	Private	900-1,200			4,300	175-200		Focus on expansion is in the South/Southeast US
Guitar Center	Private Equity	10,000-12,000	-	44 states	290			
Jared Jewelry	NR	4,500-6,500	\$745	39 states	253			Growth plans in New England
JoAnn Fabrics & Crafts	B	15,000-22,000	-	49 states	851			
Kendra Scott		1,500-1,600			100			
Michaels Stores	Public	12,000-25,000	\$227	49 states	1,262	37		Believes US and Canada can support 1,500 locations.
My Salon Suite		4,000-10,000		13 states			50	Plans are for 100 locations in 2020-2021.
Party City	Private Equity	12,000-15,000	\$235	46 states	957	(55)		60% owned by PE firm Thomas H. Lee Partners. 88% of the locations are corporately operated. Long-term expansion plans include another 300 locations in North America.
Regis Corporation	Public	800-1,200		Nationwide	7,100	100-150		Concepts include Supercuts, Cost Cutters, Roosters & First Choice Haircuts
Sally Beauty Supply	NR	1,400-2,000	-	Nationwide	5,089			Note: Store count includes international locations, of which Sally operates in 12 countries including the US. Current plans are to remodel 100+ locations throughout Texas.

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Sephora	Public	4,000-5,500		Nationwide	490	35	100	Currently Sephora has 490 standalone locations in the US and 660 stores located in JC Penney. Plans are for smaller format (4,000 SF) in more neighborhood locations vs. mall.
Signet Jewelers ¹	Public	1,600	\$1,259	50 states	2,996			
Sola Salon Studios		5,500-8,500		44 states	534		79	Currently has 79 leases signed for 2020 openings.
Sprint								
Things Remembered	Private Equity				422	(250)		2/7/19 - Filed for Chpt 11 Bankruptcy; mulling closure of 400 stores. Closing 220 stores and 30 kiosks
Tiffany & Co.	Public	4,200	\$2,509		93	8		75% of their store base are located in luxury department stores or shopping malls
T-Mobile		1,500-2,500						
Toys "R" Us Babies "R" Us	Private	20,000-30,000	-	Nationwide	835			
The UPS Store		800-1,800	-	50 states	4,867			Looking to expand nationwide
U.S. Cellular	NR	1,200-3,500	-	Nationwide	825	10-15		
Ulta Beauty	Public	5,000-12,000	\$498	48 states	1,241	80	75	Long term potential is to grow store base to more than 1,500-1,700 locations. Expansion plans are 75 stores in 2020 and 75 stores in 2021.
Verizon Wireless	BBB+	1,200-5,000	-	Nationwide	2,000			

1 - Concepts include: Kay, Zales, Peoples, Jared & Piercing Pagoda

Pet Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
PETCO	Private Equity	4,500-13,500	-	Nationwide	1,409			Testing new store concept called "PetCoach" - primarily used for grooming, training & vet care
petsense	Tractor Supply	5,500-6,500	-	-	174	8	10-15	Acquired by Tractor Supply in the 4Q 2017.
PetSmart	Private Equity	6,000-27,500	\$243	Nationwide	1,404			Acquired by private equity firm BC Partners which transitioned company to a private company.
Pet Supplies Plus	Private Equity	5,000-15,000	-	29 states	425	50	50-70	Plans are to open 200 stores over the next 5 years. Expanding in new markets: California, Colorado & Oklahoma.

Quick Service Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Arby's	NR	1,800-2,200	\$1,177,000	48 states	3,228			68% of fleet are operated by franchisees.
Auntie Anne's			\$538,000		1,295			
Baskin-Robbins	Dunkin'		\$240,000	Nationwide	2,542	(10)		
Bojangles' Famous Chicken	Private	2,200-3,800	\$1,741,000	10 states	764	10-20		Plans are for buildout of 3,500 locations nationwide. 57% of locations are franchised. 11/6 - being acquired by Durational Capital Management & The Jordan Company for \$594M, of which the company will be taken private.
Boston Market	Private Equity	2,500-3,500	\$1,259,000	28 states	456	(45)		
Burger King	Public	2,500-3,500	\$1,361,000	Nationwide	7,298			
Captain D's	Private Equity	1,800-3,250	\$1,059,000	22 states	540	30	25	50% of fleet are corporately operated
Caribou Coffee	Private Equity	600-1,800	-	18 states	273		25	Focus is in MN, WI, ND, IA, MO, NC & GA
Carl's Jr.	Private	2,360-3,037	\$1,239,000	Nationwide	1,152	25		300 new locations in Texas over next 3 years. Growth opportunities in Western US. 92% franchised. Carl's growth is targeted towards Western US. Target is 40 locations in 2020
Checker's Drive-In	Private Equity	700-3,000	\$972,000	30 states	851			63% of fleet are operated by franchisees
Chick-fil-A	NR	4,000-5,000	\$4,167,000	43 states	2,085			Min acreage 1.25 acres
Church's Chicken	NR	850-2,200	\$714,000	28 states	1,131			
Dairy Queen	NR	2,600	\$1,205,000	Nationwide	6,500			Current focus is on the DQ Grill & Chill concept
Del Taco	Public	1,500-3,200	\$1,508,000	14 states	580	25		
Domino's Pizza	Public	1,500-3,500	\$1,123,000		5,985			94% of locations are franchised across 800 franchisees.
Donatos Pizza	NR		\$1,100,000		155			65% of fleet are operated by franchisees
Dunkin' Donuts	Public	900-2,500	\$929,000	Nationwide	9,554	211	200-250	Free standing footprint is 1,800 SF. Believes the US has room for 18,000 locations. Less focus of non-traditional locations with no customer experience.
Dutch Bros. Coffee	NR	200-300	\$300,000	7 states	200			Plans are to expand in Northern Colorado
Firehouse Subs		1,400-1,800	\$712,000	46 states	1160+			

Quick Service Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Golden Chick	NR	2,400	-	FL, GA, OK, SC, TX	166			Continued build-out in existing states.
In-N-Out Burger	NR	3,000-4,500	\$2,794,000	AZ, CA, NV, TX, UT	338			Actively expanding in DFW, possible expansion to other TX cities/surrounding states.
Hardee's	Private	2,360-3,037	\$1,131,000	Midwest/Southeast U.S.	1,812			
Jack in the Box	NR	2,400-2,800	\$1,553,000	21 states	2,252			Growth opportunities in CA, OH & TX in the next 18 months
Jack's	Private		\$2,600,000	4 states	162			
Jamba Juice	Private Equity	1,000-1,500						
Krystal	NR	1,200-2,300	-	10 states	368			
KFC	Yum!	1,900-3,500	\$1,210,000	Nationwide	3,979	67	100	Target is 100 units per year with a target of 5,000 locations.
Marco's Pizza			\$883,073	30 states	883			
McDonald's	Public	2,500-5,500	\$2,769,000	50 states	13,972		90	Owns 70% of its buildings. 94.7% of US locations are franchised.
Papa John's	Public	1,300	\$815,000	Nationwide	3,407			
Papa Murphy's	NR	1,000-1,500	\$568,000	37 states	1,436	10		Mostly in inline/strip centers
Pizza Hut	Yum!	2,900-4,000	\$878,000	Nationwide	7,449	(250)		Plans are to decrease over 500 locations over the next two years as part of closing underperforming stores and converting to its modern express format.
PJ's Coffee					100	30		
Popeyes	RBI	2,100-3,150	\$1,415,000	Nationwide	2,411			
Raising Cane's	NR	2,700-5,000	\$2,963,000	23 states	400			
Starbucks	Public	500-2,000	\$1,349,000	Nationwide	18,067	600		Store counts reflect "Americas." Over the next 5 years, Starbucks is planning 3,500 net new stores in the "Americas". Real Estate strategy will be driven by placing the majority of our new stores throughout middle America and the South with careful consideration of the format type. More than 80% of stores built in the next few years will be drive-thru. Plans are for 600 new locations in the Americas segment in 2020
Schlotzsky's Austin Eatery	Private	2,800-3,200	-	Nationwide	350			Growth opportunities in AZ, GA, LA, OK, TX & WA
Scooter's Coffee	NR	450-1,800	-	-	155			

Quick Service Restaurants

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Sonic Drive-In	Public	1,200-2,500	\$1,250,000	45 states	3,589	50-55		Plans are to open 1,000 restaurants over the next 10 years. 9/2018 - being acquired by Inspire Brands for \$2.3B which is expected to close by year end. Growth plans for 2020 are 50 new locations
Subway	NR	300-3,000	\$420,000	Nationwide	26,744			
Taco Bell	Yum!	1,500-3,000	\$1,600,000	Nationwide	6,942			Target is 8,000 locations by 2022 in the US, including 300 restaurants in urban areas by 2022.
Taco Bueno	Private Equity	2,200-2,850		7 states	172			11/2018 - filed for Chapter 11 bankruptcy - being acquired by Sun Holdings Inc. as part of the restructuring.
Teavana	Public	800-900		26 states	379			-379 stores by January 2018 (only 302 will close)
The Coffee Bean & Tea Leaf	Private				311			Plans are to expand over 100 locations in NYC Metro over the next 10 years. National goal is to grow to 1,000 locations over the next 5-10 years
Tim Hortons	RBI	1,500-2,000	\$1,027,000	Midwest & Northeast	657			Expansion in MI, OH, PA, NY, ME
Wendy's	Public	2,200-3,200	\$1,636,000	Nationwide	6,564	175		Plans are to add 500 locations domestically by 2020. 5% of restaurants are corporately operated.
Whataburger	NR	1,800-3,400	\$2,929,000	Southwest & Southeast	825			Growth opportunities in AL, AR, AZ, FL, LA, MS, NM, OK & TX. Needs > 1.0 acre
White Castle	NR	1,500-2,500	\$1,480,000	11 states	375		12	12 stores annually over next three years in Midwest
Yoshinoya	Private	2,000-2,400	\$1,400,000	California	108			Targeting 100 new locations in 5 years across West Coast.

Fast Casual | Casual Dining | Fine Dining

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Applebee's	Public	3,500-6,000	\$2,267,000	Nationwide	1,936			
Bar Louie	Private Equity	6,000-7,000	\$2,400,000	27 states	125			Plans for over 100 franchised and 100 corporate locations in the next 5 years. Looking for 2nd generation and new lifestyle retail locations.
Beef O'Brady's	Private Equity	3,000-3,500	\$1,585,000	23 states	186			7/2017 - acquired by PE Group CapitalSpring
Benihana	Private Equity	7,800	\$4,209,800	Nationwide	105			
BJ's Restaurant & Brewhouse	Public	7,000-10,000	\$5,400,000	27 states	206	7-8		Believes it has ability to grow to as many as 425 units nationwide.
Black Bear Diner	Private Equity	5,300	\$2,600,000	10 states	110			Expansion is even split between corporate & franchisee growth. Starting to look in the Midwest.
Blaze Fast-Fire'd Pizza	Private Equity	2,400-3,000	\$1,420,000	41 states	315	80	35-45	Plans are for 50+ new locations in 2021
Bob Evans Restaurants	NR				523			Acquired by P/E firm Golden Gate Capital for \$565M
Bonefish Grill	Public	4,500-7,000	\$3,033,000	34 states	199			
Bruegger's Bagels	NR				240			
Buffalo Wild Wings	Public	4,000-7,500	-	Nationwide	1,145			39% are company operated. Plans are to operate 1,700 locations in the US and Canada by 2019. 12/2017 - being acquired by Arby's for \$2.44 billion
BurgerFi			\$1,300,000	20 states	104			
Café Rio Mexican Grill	Private Equity	2,200-3,000	\$2,100,000	12 states	118			Majority stake acquired by Freeman Spogli & Co. (9/2017)
Capriotti's Sandwich Shop	NR				100			Looking to expand in Philadelphia, Wash D.C. & Baltimore. Plans are for 500 locations by 2025.
Carrabba's Italian Grill	Public	6,000-8,000	\$2,968,000	Nationwide	227			
Cava	NR			East and West Coast	35			Plans to grow in D.C. NY and NJ including new location in Connecticut
Cheddar's Casual Café	Darden	5,000-10,000	\$4,500,000	23 states	165			Plans are to open 50 Darden Concepts in FY '20 (specific brands not specified)
Chicken Salad Chick	Private Equity		\$1,200,000	13 states	105			Expanding into DFW Maret targeting 15 locations over the next several years.

Fast Casual | Casual Dining | Fine Dining

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Chili's	Public	4,500-6,000	\$2,415,000	Nationwide	1,248	7-9		75% of locations are corporately operated
Chipotle Mexican Grill	Public	2,000-2,200	\$2,000,000	Nationwide	2,546	140-155	150-165	Management believes there is enough room for 5,000 locations in the US. Announced it will open 150-165 restaurants in 2020, of which 50% will have drive-throughs.
Chuck E. Cheese*	NR	14,000-20,000	-	47 states	609			Planning for IPO
Chuy's	NR	5,500-8,000		15 states	101	6	5-7	Growth opportunities in AL, AR, FL, GA, IN, KS, KY, LA, MO, NC, OK, SC, TN, TX & VA. Typical 15-20 yr leases
Corner Bakery Café	Private	1,800-2,800	-	24 states	177			67% Corporate/33% Franchise. Continuing to remodel existing store base and source new locations for updated prototype. Preferred real estate is end cap with a drive-thru (suburban) or urban walk-up. Opportunistically growing in corporate markets (Dallas, Chicago & Wash DC)
Cracker Barrel	Public	10,000	\$4,622,000	45 states	667	8	6	Approximately 20% of gross revenue comes from its retail operations.
CraftWorks Restaurants & Breweries	Private Equity			36 states	189			11/1/18 - acquired Logan's Roadhouse. Concepts include: Old Chicago Pizza & Taproom, Rock Bottom Restaurants & Breweries, Gordon Biersch Brewery & Big River Grille & Brewing Works
Culver's	NR	4,500	\$2,390,000	24 states	686			
Dave & Buster's	Public	17,000-40,000	\$11,513,000	37 states	130	15-16		Believes opportunity is for 230-250 locations in US & Canada alone
Denny's	Public	4,000-5,000	\$2,100,000	Nationwide	1,735			168 owned and 1,560 franchised. 49% of entire fleet is remodeled.
Dickey's Barbeque Pit	NR	1,800-2,500	-	43 states	560			
El Pollo Loco	Public	2,200-3,000	\$1,798,000	AZ, CA, LA, NV, TX & UT	475			Growth opportunities in existing states.
Famous Dave's	NR	4,000-6,000	-	34 states	164			Current focus is rebuilding; closing down non-profitable stores & selectively opening new stores.
Fazoli's	NR	2,000-2,400	-	26 states	220			Expansion opportunities in Cincinnati, Cleveland, Detroit, Pittsburgh, Dallas, Phoenix & Charlotte

Fast Casual | Casual Dining | Fine Dining

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Five Guys	Private	-	\$1,275,000	1,000	1,358			
First Watch	Private Equity	3,500		27 states	339			Long range goal of 1,400 restaurants.
Freddy's Frozen Custard & Steakburgers	Private	2,800-3,600	\$1,600,000	32 states	363		48	Plans including opening locations in new states: Wyoming, Maryland and Mississippi
Friendly's	Private Equity	3,250	-	10 states	250			
Fuddruckers	Public				184			
Fuzzy's Taco Shop	-	3,000-4,000	\$1,300,000	11 states	100			
Golden Corral	NR	8,032 & 10,308	-	41 states	484			Need land in the 2-2.5 acre range. 94 units (19%) are corporately operated.
Habit Burger Grill	NR	2,600-2,800		9 states	262	21-23		Jan 2020- announced that Yum Brands will acquire
Hooters Restaurants	Private Equity	5,000-8,000	-	38 states	430			7/1/2019 - acquired by private equity firms Nord Bay Capital & TriArtisan Capital Advisors
Houlihan's	NR	7,500-8,500	-	Midwest/Eastern US	100			
Huddle House								
Hwy 55	NR			11 states	135			
IHOP	Public	4,200-6,000	\$1,888,000	Nationwide	1,786			
Jason's Deli		4,500	\$2,520,000	28 states	278			
Jersey Mike's	-	1,200-1,800	\$769,000	42 states	1,187			Target is to operate 2,000 stores by 2020
Jimmy John's			\$772,000		2,814			10/2019 - being acquired by Inspire Brands
Johnny Rockets	Private Equity							
Little Caesars	Private	1,400-1,600	\$874,000	Nationwide	4,294	-		Focus is grocery anchored centers and retail strip centers near dense residential areas.
Logan's Roadhouse	NR	5,600-7,500	-	22 states	204			11/1/18 - acquired by CraftWorks Restaurants & Breweries
LongHorn Steakhouse	Darden	5,500-6,300	\$3,463,000	40 states	514			Plans are to open 50 Darden Concepts in FY '20 (specific brands not specified)
McAlister's Deli	Private	3,000-4,000	\$1,634,000	27 states	450			Plans are for expansion of 47+ locations through a franchisee in TX, LA, FL NM

Fast Casual | Casual Dining | Fine Dining

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
MOD Pizza	Private	2,600	\$1,200,000	21 states	433	100		6/2019 - Raised another \$160M in equity; plans are to grow to 1,000 locations in 5 years.
Moe's Southwest Grill	Private	2,400-2,800	\$1,022,000	38 states	719			
Mountain Mike's				CA, NV, OR, UT	204			
Ninety Nine Restaurant & Pub	Private Equity				106			Merging with J. Alexander Holdings, Inc. (8/2017)
Noodles & Company			\$1,075,000	35 states	510			
Olive Garden	Darden	7,500-8,500	\$4,861,000	Nationwide	867			Plans are to open 50 Darden Concepts in FY '20 (specific brands not specified)
O'Charley's	NR	6,000-9,300	-	19 states	212			
Outback Steakhouse	Public	3,500-10,000	\$3,407,000	Nationwide	737			
Panda Express	Private	2,300-2,600	\$1,616,000	48 states	1,893	100		Prefers owning real estate - +/- .75 acres.
Panera Bread	Private Equity	3,200-4,500	\$2,740,000	46 states	2,050			50% of expansions are franchisee driven vs. corporate. 11/2017 - acquiring Au Bon Pain, which operates 304 locations
Peter Piper Pizza	Private Equity				141			
P.F. Chang's China Bistro	NR	6,000-7,000	-	41 states	214			
Pizza Inn	Public	2,100-4,500			161			Targeting 18-20 new locations in FY '18
Pollo Tropical	Fiesta	3,000-4,000	\$2,720,000	FL, GA, TN & TX	185			
Potbelly	Public	2,300		31 states	476			10% of the system is franchised.
Qdoba Mexican Grill	Public	2,800-3,000	\$1,132,000	47 states	743			Being acquired by Apollo Global Management - expected to close April 2018
Red Lobster	BBB	6,000-7,500	-	Nationwide	662			
Red Robin	Public	2,000-6,000	-	Nationwide	562	(11)		Expanding into FL, NJ, NY, Chicago & TX. 81% are corporately operated.
Ruby Tuesday's	Public	6,000	-	41 states	560			
Ruth's Chris	Public				132			
Shake Shack	Public				130	36-40		
Slim Chickens	Private Equity	2,400-2,800		14 states	100	21	31	Intends on growing to 600 restaurants over the next decade

Fast Casual | Casual Dining | Fine Dining

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Smashburger	NR	2,500	-	38 states	312			
Steak 'N Shake	B	2,000-4,500	\$1,739,000	22 states	550			
Taco Cabana	Fiesta	3,500	\$1,757,000	NM, OK, TX	173		(19)	
Taco Del Mar	Private Equity			Western US	100			7/2018 - announced that PE firm High Bluff Capital Partners is acquiring company.
The Cheesecake Factory	NR	7,200-11,000	\$10,500,000	Nationwide	211			
Texas Roadhouse	Public	6,300-8,500	-	49 states	544	22	30	
TGI Friday's	NR	7,000-8,500	-	Nationwide	878			
Tropical Smoothie Café	Private Equity	800-1,600	\$498,235	33 states	775	130		Company has targeted 1,500 over the next 5 years. Primary growth targets include: Dallas, Houston, Chicago, Atlanta, Charlotte & Tampa.
Which Wich	Private	1,600-1,800	-	36 states	404	35		
Wingstop	NR	1,350-1,800	\$1,139,000	40 states	1,252			98% of fleet are operated by franchisees
Zaxby's	NR	2,400-3,900	\$2,060,000	17 states	850			Expanding into OH & MD
Zoe's Kitchen	Private	2,600-3,100	-	Nationwide	260			Target markets include AZ, Denver, Orlando, Tampa, FL, Kansas City, Philadelphia and TX.

Shoe Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Boot Barn	Private Equity	8,000-12,000	\$254	33 states	240	23	20	20% of the store base is located in Texas. Currently eyeing Northeast for expansion; believes it can double its footprint to 500 total locations. Target is to open 40 stores by 2021.
Caleres	Public	6,000-7,000		50 states	935		20	2020 plans are also to relocate 5 locations, close 50 locations and remodel/refresh 165 locations
DSW	Public	15,000-20,000	\$246	45 states	521		10-15	Long term goal is 550 locations. Has a smaller footprint (10-12K SF) they're testing in some smaller markets.
Finish Line	Public	5,565	\$372	46 states	573			
Foot Locker	Public	4,485	\$504		886			

Shoe Stores

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Payless ShoeSource	NR			30 Countries	2,700			Emerged from bankruptcy August 2017. 1/2019 - evaluating strategic alternatives, which may include bankruptcy.
Red Wing Shoes	Private							
Skechers	Public	7,500-10,000	\$430		477			
Shoe Carnival	Public	8,000-10,000	\$241	35 states	392	-	6-8	Long term goal is to have 750 stores nationally. No free-standing concept - mostly inline. Company leases 99% of its properties. 2019 focus is on asset management of existing portfolio, which includes relocations, renewals, remodels and new design development.

Sporting Goods

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
Academy Sports + Outdoors	NR	50,000-80,000	-	15 states	246			
Big 5 Sporting Goods	Public	8,000-15,000	\$199	11 states (Western US)	436	5		Over the next 5 years; 53 leases are scheduled to expire without renewal options
Camping World	Public	10,000-64,000	-	36 states	168		1	Needs 10-20 acres per site, depending on the market. 2020 focus is on remodels & renewals.
Dick's Sporting Goods	Public	50,000-75,000	\$183	47 states	733			
Dunham's Sports		30,000-100,000		24 states	240		7-10	
Gander Outdoors	Camping World			16 states	62			Plans are to open up to 40 Gander RV Sales locations by Spring of 2019, positioned side by side with Gander Outdoors
Hibbett Sports/City Gear	Public	5,000	\$141	35 states	1,108	135	(95)	Smaller markets, inline space & enclosed malls. Plans are to grow to 1,500 stores nationwide long term. 10/2018 - announced it was acquiring City Gear, a specialty retailer with 135 stores across 15 states. The company announced it would be closing 95 stores in FY 2020.
Modell's Sporting Goods	Private				141		(141)	3/2020 - Filed Chapter 11 bankruptcy and will be closing all 141 stores.

Sporting Goods

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
REI	NR	20,000-30,000		37 states	158	7	4	In 2020, the retailer plans to open stores in Appleton, Wisconsin; Wichita, Kansas; Columbia, South Carolina; and Tampa, Florida.
West Marine	Private Equity	6,000-25,000	-	38 states	250			7/3/17 - Being acquired by Private Equity firm Monomoy Capital Partners for \$338M

Theatres | Entertainment

Tenant Name	Entity Type	Average SF	Sales Per SF	Region	# Operated	2019 Expansion	2020 Expansion ²	Growth Plans
AMC Entertainment	Public	15,000-135,000	\$97	44 states	639			
Bowlmor/AMF	NR	35,000-50,000	-		290			
Cinemark Holdings	Public	-	-	41 states	334	12		
Cineplex Entertainment					165			
Kerasotes Theater	NR	60,000-80,000		9 states (Midwest)	100			
Regal Entertainment	NR	-	-	43 states	564			

The background of the slide features a blue-tinted image of two men in business suits. The man on the left is holding a tablet, and both are looking at it. The image is overlaid with a network of white lines and dots, along with various business-related icons such as a telephone, a person silhouette, a shopping cart, a bar chart, a line graph, a padlock, a game controller, and a location pin. The title text is prominently displayed in the center-left area.

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			Steven King	901-495-8123	steven.king@autozone.com	AK, AZ (West), CA, NV, UT
			Christopher Walker	901-495-7348	christopher.j.walker@autozone.com	AZ, KS, KY, LA, MS, MO, NM, OH, OK, TN, TX, WV
			Bryan Daugherty	901-495-7985	bryan.daugherty@autozone.com	CA, ID, NV, OR, WA
			Ashley Walker	901-495-8199	ashley.walker@autozone.com	CO, ID, MT, NV, NM, SD, UT, WY
			Bill Smith	724-971-4960	william.f.smith@autozone.com	CT, MA, NJ, NY, RI
			Jim Herring	901-495-8672	james.herring@autozone.com	DE, MD, MA, NJ, OH, PA, RI, WV
			Chandler Johnson	901-495-8763	chandler.johnson@autozone.com	DC, MD, PA, VA
			James Hancock	901-495-6972	james.hancock@autozone.com	FL, GA, NC, SC, TN, VA
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			Johnny Mann	901-495-8776	johnny.mann@autozone.com	IL, IA, KS, MI, MO, WI
			Stan Carpenter	901-495-8788	stan.carpenter@autozone.com	IL, IN, IA, KY, MI, MN, MO, NE, ND, OH, SD
			Troy Derrick	901-495-6059	troy.derrick@autozone.com	LA, NM, OK, TX
			Joe McDonald	901-495-6994	joe.mcdonald@autozone.com	ME, NH, NY, PA, VT
			David Neal	9014956893	david.neal@autozone.com	CO, ID, NM, SD,
			Scott Armstrong	9014957320	scott.armstrong@autozone.com	AZ, FL, ID, UT, WA
			Laura Sharpe	9014958797	laura.sharpe@autozone.com	AZ, LA, MO, OK, TN, TX
Badcock Home Furniture & More	Mulberry	FL	Alexis Sharp	800-223-2625	alexis.sharp@badcock.com	
Bar Louie	Addison	TX	Jill Szymanski	214-218-2730	jSzymanski@blro.net	Director of Franchise & Real Estate
			Kevin Fitzgerald	214-845-4800	kfitzgerald@blro.net	Director of Real Estate
Bealls Department Stores	Bradenton	FL	Stan Farnowski	941-744-4638	ssarnowski@beallsinc.com	Director of Real Estate
Bed Bath & Beyond, Inc.	Union	NJ	Seth Gledzahler	908-855-4568	seth.gledzahler@bedbath.com	VP - Real Estate

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Steven Goldberg	908-855-4571	steven.goldberg@bedbath.com	AZ, NY (Brooklyn), IL, IN, MI, NV, PR, FL, WI
			Stephen Austin	908-855-4569	steve.austin@bedbath.com	CO, DE, ID, MD, MT, NJ, OH, PA, VA, DC, WV, WY
			Peter Russell	908-855-4576	peter.russell@bedbath.com	AL, AR, FL, HI, KY, LA, Mexico, MS, NM, OK, TN, TX
			Philip Oney	908-855-4654	phil.oney@bedbath.com	AK, CT, ME, MA, NH, NJ, RI, VT
			Leonard Cohen	908-855-4990	leonard.cohen@bedbath.com	NY (Manhattan), UT
Beef O'Brady's			Michelle Sudovich	813-226-2333	msudovich@fscfranchiseco.com	Director of Franchise Sales
Belk	Charlotte	NC	Susan Clark		susan_clark@belk.com	
Benihana		FL	Adam Hlavaty	305-702-2819	ahlavaty@benihana.com	VP of Development
BevMo!	Concord	CA	Greg Endom	925-609-6031	endomg@bevmo.com	SVP - Real Estate, Construction & Facilities
Big 5 Sporting Goods	El Segundo	CA	Jim Berlin	310-536-0611	jsb@big5corp.com	Director of Real Estate
			Dorm Leighty	310-536-0611		Vice President - Real Estate
Big Lots	Columbus	OH	Kevin Day	614-278-6718	kevinday@biglots.com	Market Research
			Vince Cattano	614-278-6720	vincecattano@biglots.com	FL, GA, ID, IA, IL, IN, KY, MD, MI, MN, MT, NC, ND, NE, OH, OR, SC, SD, TN, VA, WA, WI, WV, WY
			Josh Nanberg	614-278-6945	joshuananberg@biglots.com	AL, AR, AZ, CA, CO, CT, DE, KS, LA, MA, ME, MO, MS, NH, NJ, NM, NV, NY, OK, PA, RI, TX, UT, VT
BJ's Restaurant & Brewhouse			Sujit Shah	714-500-2460	sshah@bjsrestaurants.com	Director of Real Estate
			Tom Hundrieser	630-665-7850	thundrieser@bjsrestaurants.com	Director of Real Estate
Blaze Pizza	Pasadena	CA	Garrett Snyder	949-291-5378	garrett.snyder@blazepizza.com	SoCal, AZ, NV, UT, NM, CO, ID, MT, WY, ND, SD, NE, MN, IA, IL, Southern TX
			Robert Kluger	626-255-6755	robert.kluger@blazepizza.com	WA, OR, No Cal, WI, MI, IN, OH, KS, OK, TX, AK, HI, MO, AR, LA, MS, AL
			Keith Chandler	678-761-0810	keith.chandler@blazepizza.com	ME, VT, NH, MA, RI, CT, NY, NJ, PA, DE, MD, DC, WV, VA, KY, TN, NC, SC, GA, FL, Canada
Books A Million (BAM!)	Birmingham	AL	Carolyn Barnes		keeneyc@booksamillion.com	Northeast
			Scott Terry			Southeast (Florida)
			Tyler Bradford	205-909-0945	bradfordt@booksamillion.com	VP of Real Estate
Boot Barn			John Neppi	949-453-4466	jneppi@bootbarn.com	VP of Real Estate/Construction

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
Bojangles' Restaurants, Inc.	Charlotte	NC	Joe DosReis	703-314-7997	jdosreis@bojangles.com	Director of Real Estate- NC, TN, VA, WV, KY, PA & MD
			Chris Hack	864-979-3330	chack@bojangles.com	Director of Real Estate- FL, GA, AL, MS, SC & NC
BP ARCO AMPM			Ken Wold	281-995-5679	kenneth.wold@bp.com	Sacramento/Central Valley (CA)
			Patrick Lemons	925-383-4071	Patrick.Lemons@bp.com	Greater San Fran Bay Area (CA)
			Gary Heitlauf	425-867-9706	gary.heitlauf@bp.com	Seattle & Vancouver (WA)
			Eric Sell	925-642-3714	eric.sell@bp.com	Oregon
Bridgestone/Firestone	Roanoke	VA	Chris Miller	615-937-2601	millerchris@bfusa.com	Northeast, TN, KY, WV
			Don Ehlers	816-721-0893	dehlers@bfrc.com	Western US, OK, MO, AR
			Arun Malvea	770-321-4460	amalvea@bfrc.com	Southeastern US
			Laura Wilson	404-991-0282	WilsonLaura@bfusa.com	TX, FL
			Justin Werthan	615-772-3325	WerthanJustin@bfusa.com	LA, MS, AL
Brookshire Grocery Company	Tyler	TX	Trey Brewer	903-534-3001		
BurgerFi			William Dolan	(561) 598-6420	wdolan@burgerfi.com	Director of Real Estate
Burger King	Miami	FL	Patrick Coelho	305-378-3018	pcoelho@rbi.com	Head of Development, North America
			Orlando Garcia	305-378-3049	ogarcia@rbi.com	Central Development Lead
			Cynthia Bunting	305-378-7548	cbunting@rbi.com	Midwest Development Lead
			Alexander Plevka	305-378-3656	aplevka@rbi.com	West Development Lead
			David Kennedy	305-378-3169	dkennedy02@rbi.com	Southeast Development Lead
			Clayton Lawrence	401-527-5663	clawrence1@rbi.com	North America Lead Non-Traditional Development
			Lawrence Brown	905-339-6295	lbrown5@rbi.com	North America Deal and Acquisitions
			William Washington	305-378-3026	wwashington@rbi.com	North America Development
			Madeline McDermott	305-378-3348	MMcDermott@rbi.com	Northeast Development Lead
Burlington Coat Factory	Burlington	NJ	Alan Eichberg	609-658-0902	alan.eichberg@burlingtonstores.com	NY, East PA, NJ, MA, CT, NH, ME, VT, RI, DE
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Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Eric Corpuz	858-395-4084	eric.corpus@burlingtonstores.com	CA, WA, OR, ID, NV, AZ, UT, MT, WY, CO, NM, KS, NE, SD, ND, MN, IA, WI, AK
			Jeff Morrow	817-939-0796	jeff.morrow@burlingtonstores.com	TX, OK, AR, LA, MS, AL, So FL, Puerto Rico
Café Rio Mexican Grill	Salt Lake City	UT	Don Lewandowski	801-441-5041	dlewandowski@caferio.com	Chief Development Officer
			Alex DeZonrzi		adezonrzi@caferio.com	California (Northern CA/Central Valley/LA County)
			Ted Low	512-508-1760	tlow@caferio.com	California (San Diego/Riverside County/Orange County/Arizona)
			Judy Messenger	816-898-6875		FL, MD, VA
			Wes Graham	8014-643-2909	wgraham@caferio.com	NV, UT, ID, CO
Caleres	St. Louis	MO	Tim Meyer	314-854-3060	tmeyer@caleres.com	SVP, Coporate FP&A, RE
			Jim Pye	847-490-5353	jpye@caleres.com	Director of Real Estate West
			Andrew Ross	612-349-2790	aross@caleres.com	Director of Real Estate East
			Matt Rose	314-854-3087	mrose@caleres.com	Director, Corporate Real Estate
Camping World	Chicago	IL	Melissa Nance	847-229-6755	melissa.nance@campingworld.com	National
Captain D's	Nashville	TN	Phill Russo	330-421-8573	phil_russo@captains.com	VP of Real Estate
			Jeff White	770-597-8470	jeff_white@captains.com	Director of Real Estate
Carl's Jr./Hardee's			Ingrid Akers	949-278-6994	iakers@ckr.com	CA, NV, OR, WA, ID, UT, NM (Southwest)
			Lisa Shaw	805-745-7882	lshaw@ckr.com	AZ, NM, TX, CO, WY, MT, ND, SD, NE, KS, OK, LA, AR, MA, AL, TN (West), AR, MO, IL, IA, MN, WI, GA
			Bob Paszek	714-797-4077	rpaszek@ckr.com	FL, SC, NC, TN (East), KY, IN, MI, OH, WV, PA, VA, Mid-Atlantic
CardSmart	Edison	NJ	Barry Grody	914-673-5582	barry.grody@cardsmart.com	Director of Real Estate
Carter's			Brandon Clawson	724-787-0413	brandon.clawson@carters.com	Senior Director of Real Estate
Casey's General Store			Zach Scheckel	515-965-6598	Zachary.scheckel@caseys.com	Real Estate Leasing & Sales
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			Tony Rubino	515-201-2218	tony.rubino@caseys.com	Real Estate Store Development
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Real Estate Contacts Cont.

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			Kyle Krull	704-940-7852	kknull@catocorp.com	Assistant Regional VP, Director of RE- AL, KY, LA, MS, SC, TN, VA, WV
			Julie Dobler	704-571-7739	jdobl@catocorp.com	Director of Lease Renewals
			Warren Doyle	704-551-7641	wdoyle@catocorp.com	VP Corporate Real Estate
Checker's Drive-In	Tampa	FL	Kris McDonald	813-817-4778	mcdonaldk@checkers.com	Director of Real Estate
			Caroline Cheng	404-218-2764	chengc@checkers.com	Company Real Estate Manager
			Jerry Conklin	469-766-1004	conklinj@checkers.com	Regional Real Estate Manager-Texas, CA, NV & AZ
			Heidi Price	614-578-1319	priceh@checkers.com	Regional Real Estate Manager- MI, WI, MN, IO, MS, AR, MS, LA, AL, GA, TN, KN & OH
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			Bob Wasilewski	9545591953	wasilewskib@checkers.com	Real Estate Manager
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Cheddar's Casual Café	Irving	TX	Joe Mutti	214-596-6777	jmutti@cheddars.com	
Chicken Salad Chick			Terry A McKee			VP, RE and Store Development
Chick-Fil-A	Atlanta	GA	Erwin Reid		erwin.reid@chick-fil-a.com	
Chipotle			James Beus	323-622-8309	jbeus@chipotle.com	CA (Los Angeles/Ventura County/Inland Empire), MT, IT, UT
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Real Estate Contacts Cont.

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			Jim Stadleman	630-605-1402	jstadleman@chipotle.com	NC, SC, Southern VA
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			Jerry Williams	630-886-4000	jwilliams@chipotle.com	UK, France, Germany
Church's			John Cirillo	770-350-3809	jcirillo@churchs.com	Senior Director, Global Real Estate
Chuy's	Austin	TX	Michael Hatcher		mhatcher@chuys.com	
Cinnabon	Atlanta	GA	Mark Hong	404-702-8852	mhong@cinnabon.com	Director, Franchise Development
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Circle K	Charlotte	NC	Sarah Longwell	951-270-5117	slongwel@circlek.com	West Coast - Director of Real Estate (WA, OR, CA, HI)
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			Suzy Peel	602-728-4047	speer@circlek.com	Arizona - Director of Real Estate (AZ & NV)
			Mark Stinson	815-293-7747	mstinson@circlek.com	Northern Tier - Director of Real Estate (AK, ID, MD, WY, ND, SD, MN, WI)
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			Chris McGinn	720-758-6260	cmcginn@circlek.com	Rocky Mountain - Development Manager
			Gregg Guy	812-379-9227	gguy@circlek.com	Midwest - Director of Real Estate (IN, KY, TN)
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Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Don Silver	317-370-1425	dbsilver@circlek.com	Midwest - Development Manager
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			Tony Sgarlata	815-762-4861	acsgarlata@circlek.com	Heartland - Development Manager
			Phil Bolduc	630-674-7445	pabolduc@circlek.com	Heartland - Development Manager
			Rich Lawrence	330-630-6300	rlawrence@circlek.com	Great Lakes - Director of Real Estate (MI, OH, WV, PA, NJ, NY, DE, NH, CT, MA, ME)
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			Darren Higgins	512-970-6985	dhiggin@circlek.com	Texas - Director of Real Estate
			Peter Licata	713-252-8604	plicata@circlek.com	Texas - Development Manager
			Jamie Watson	713-703-8660	james.watson@circlek.com	Texas - Development Manager
			Otis Carter	919-774-6700	ocarter2@circlek.com	Coastal Carolina - Director of Real Estate (VA, NC, E. SC)
			Andy Priolo	919-774-6700	apriolo@circlek.com	Coastal Carolina - Development Manager
			Kevin Klemm	919-774-6700	kklemm@circlek.com	Coastal Carolina - Development Manager
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			Edward Giunta	813-910-5307	egiunta@circlek.com	South Atlantic & Florida - Director of Real Estate (S. GA, FL)
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			Rich Kingan	941-302-0796	rkingan@circlek.com	Florida - Development Manager
			Andrew Marchetti	813-910-5351	amarche@circlek.com	Florida - Development Manager
			Rodney Fields	813-910-5366	rfields5@circlek.com	Florida - Development Manager
			Randy Horne	850-454-1136	rhorrn@circlek.com	Gulf Coast - Director of Real Estate (AR, LA, MS, AL, W. FL)
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			Glen Panchisin	504-615-8155	gpanchis@circlek.com	Gulf Coast - Development Manager
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Cititrends			Kyle Koenig	912-443-1229	kkoenig@cititrends.com	Vice President, Real Estate & Construction

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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Crunch Fitness	Portsmouth	NH	Brian Kunkel	603-501-0437	brian.kunkel@crunchfranchise.com	Vice President of Real Estate
CVS Caremark	Woonsocket	RI	Jim Kurimcak	936-271-5938	michael.kurimcak@cvshealth.com	Vice President
			David Berman	516-277-1688	david.berman@cvshealth.com	Region East - NY: Metro NYC, 5 Boroughs & Staten Island
			Bryan Cook	401-665-9040	bryan.cook@cvshealth.com	Region East - Puerto Rico Region Central - FL, GA, SC, AL, Charlotte (NC), TN, Eastern MS
			Stephen Frumento		stephen.frumento@cvshealth.com	Region East - PA, DE, NJ, Fairfield (CT), Hudson Valley (NY), Rockland County (NY), Westchester County (NY)
			Robin Peterson		robin.peterson@cvshealth.com	Region East - CT, MA, ME, NY, NH, Cleveland (OH), RI, VT
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			Holly Jensen		Holly.Jensen@cvshealth.com	Region West - CA
Del Taco	Lake Forest	CA	Stephen LaBonge		stephen.labonge@cvshealth.com	Region West - CO, HI, ID, MT, NV, OR, UT, WA, CA
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Delhaize Group (Food Lion/Hannaford)	Salisbury		Hunter Steffien	949-462-7395	hsteffien@deltaco.com	VA, NC, SC, TN, AL, GA, FL
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Denny's	Spartanburg	SC	Keith King	864-597-8422	kking@dennys.com	Canada, WI, MI, IL, IN, OH, KY
			Laura Grace	714-944-9163	lgrace@dennys.com	WA, OR, ID, CA, NV, AZ, HI
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			Todd Duke	678-234-3794	tduke@dennys.com	UT, NM, ME, VT, ND, MA, NY, CT, RI, PA, NJ, TN, GA
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Real Estate Contacts Cont.

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			Mike Phillips	412-627-0372	michael.phillips2@dcsg.com	Southwest US
			Daniel Chadwick	724-273-3843	daniel.chadwick@dcsg.com	Northeast US
Discount Tire Company	Scottsdale	AZ	Eric Bloch	724-273-4712	eric.bloch@dcsg.com	Midwest/Northwest US
			Kristen Holst	714-319-3147	kristen.holst@dcsg.com	Western US
Dollar General	Goodlettsville	TN	James Silhasek	480-606-5828		
			Sharon Weber		potentialsites@discounttire.com	
Dollar General	Goodlettsville	TN	Melissa Heisse	615-855-4678	mheisse@dollargeneral.com	Lease Administration (i.e. extensions)
			Pete Akin	615-491-8497	pakin@dollargeneral.com	Senior Director - Central Region
			Chad Bayless	615-840-4360	cbayless@dollargeneral.com	Senior Director - West Region
			Dennis Young	615-445-0104	deyoung@dollargeneral.com	Senior Director - Northeast Region
			Peter Wood	615-512-1403	pwood@dollargeneral.com	Senior Director - Southeast Region
			Curtis Hopkins	615-879-2173	cuhopkin@dollargeneral.com	IL, IN
			Les Lockhart	615-714-4116	llockhar@dollargeneral.com	MI
			Chris Meyer	615-342-9318	cmeyer@dollargeneral.com	IA, MO, NE
			Dan Prior	615-992-7470	dprior@dollargeneral.com	AR, KS, OK
			Jack Shackelford	615-651-9175	jshackel@dollargeneral.com	KY, ND, SD
			Mike Tegge	414-405-6869	mtegge@dollargeneral.com	WN, WI, Chicago
			Dave Fritz	615-992-7240	dfritz@dollargeneral.com	Northern CA, OR
			Ron Rich	615-406-2557	rrich@dollargeneral.com	CO, LA, Eastern TX
			Aimee Ware	615-342-9796	aware@dollargeneral.com	Central/Western TX
			Randy Wilson	615-612-9462	rwilson@dollargeneral.com	AZ, Southern CA, NM, NV, UT
			Todd Burton	615-289-7446	tburton@dollargeneral.com	OH
			Sara Butler	615-840-4675	sabutler@dollargeneral.com	MD, VA, WV
			Sean Caplan	615-210-3125	scaplan@dollargeneral.com	DE, NJ, PA
			Joe Lampassi	615-878-4306	jlampassi@dollargeneral.com	CT, MA, ME, NH, RI, VT

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
Dollar Tree	Chesapeake	VA	Mario Parson	615-393-1825	mario.parson@dollargeneral.com	NY
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			Lauren Chiozza	615-239-9093	lchiozza@dollargeneral.com	NC
			Kevin Gromosaik	615-852-9821	kgromosa@dollargeneral.com	FL
			Greg Morgan	615-354-7309	gmorgan@dollargeneral.com	AL, MS
			Robert Sayle	615-406-3950	rsayle@dollargeneral.com	Northern GA, Western NC, TN
			Bruce Walters	757-321-5196	bawalters@dollartree.com	Chief Development Officer
			Todd Littler	757-321-5283	tlittler@dollartree.com	Senior Vice President - Leasing
			Chris Williams	757-321-5174	chwilliams@dollartree.com	Vice President - Portfolio Management
			Jeff Forman	310-793-6473	jforman@dollartree.com	Regional Director - West (WA, OR, CA, MT, ID, WY, CO, UT, NM, AZ, NV)
			Richardo Hurtado	800-876-8697	rhurtado@dollartree.com	Sr Real Estate Manager - West
			Christopher Waizmann	858-945-1437	cwaizmann@dollartree.com	Real Estate Manager - West
			Johnathan Langford	949-322-5333	jlangford@dollartree.com	Real Estate Manager - West
			George Ross	310-487-0881	gross@dollartree.com	Real Estate Manager - West
			Trace Johnson	916-772-1193	trjohnson@dollartree.com	Real Estate Manager - West
			Lisa Pruden	757-321-5886	lpruden@dollartree.com	Tenant Coordinator - West
			Terry Erney	757-321-5618	terney@dollartree.com	Regional Director - South Central (NE, KS, West LA, OK, TX, West AR)
			Neil Bovshow	972-712-7017	nbovshow@dollartree.com	Real Estate Manager - South Central
			Christine Jepson	757-321-5126	cjepson@dollartree.com	Real Estate Manager - South Central
			Tim Riddick	757-321-5197	triddick@dollartree.com	Real Estate Manager - South Central
			Gina Boyd	757-321-5935	rboyd@dollartree.com	Tenant Coordinator - South Central
			Dennis Denam	757-321-5165	ddenam@dollartree.com	Regional Director - Midwest (ND, SD, MN, IA, MO, WI, MI, IL, IN, OH, WV, KY, TN, PA)
			Russ Hire	260-423-4311	rhire@dollartree.com	Sr Real Estate Manager - Midwest
			Phillip Grassie	440-537-4216	pgrassie@dollartree.com	Real Estate Manager - Midwest
			Maureen Rooks	757-321-5673	mrooks@dollartree.com	Real Estate Manager - Midwest
			Pat Borgman	952-447-6159	pborgman@dollartree.com	Real Estate Manager - Midwest
			Kenny Palmer	757-321-5162	kpalmer@dollartree.com	Regional Director - Southeast (AR, MS, AL, GA, FL, VA, NC, SC)

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Michael Houle	757-353-8312	mhoule@dollartree.com	Real Estate Manager - Southeast
			Chad Horton	901-484-9045	chorton@dollartree.com	Real Estate Manager - Southeast
			Jason Brothers	757-321-5064	jbrothers@dollartree.com	Real Estate Manager - Southeast
			Rachel Hornbrook	757-321-5933	rhornbrook@dollartree.com	Tenant Coordinator - Southeast
			Lori Teeter	757-321-5879	leeter@dollartree.com	Regional Director - Northwest (PA, NJ, NY, VT, CT, MA, ME, RI)
			Doug Webb	757-321-5669	dowebb@dollartree.com	Sr Real Estate Manager - Northeast
			Christa Minogue	516-316-7589	cminogue@dollartree.com	Real Estate Manager - Northeast
			Robin Gasser	757-321-5455	rgasser@dollartree.com	Real Estate Manager - Northeast
			Dawn Lyon	317-809-5850	dalyon@dollartree.com	Real Estate Manager - Northeast
			Kyle Godbout	757-321-5706	kgodbout@dollartree.com	Real Estate Manager - Northeast
			Sofia Clark	757-321-5522	sclark@dollartree.com	Tenant Coordinator - Northeast
			John Crumpler	757-321-5573	jcrumpler@dollartree.com	Director of Portfolio Management
			Garren Brown	757-321-5580	gbrown@dollartree.com	Portfolio Manager
			Brooke Floyd	757-321-5401	bfloyd@dollartree.com	Portfolio Manager
			Mike McCabe	757-321-5452	mmccabe@dollartree.com	Portfolio Manager
			Amanda Madeira	757-321-5481	amadeira@dollartree.com	Portfolio Manager
DQ	Minneapolis	MN	Julie Davis	952-896-2542	julie.davis@idq.com	Director of Franchise Sales & Development US
			Jim Kerr	952-830-0376	james.kerr@idq.com	Executive VP- Franchise Development
			Karen Hamilton	952-896-2547	karen.hamilton@idq.com	Franchise Developer: West Region
			Roger Schone	952-830-0430	roger.schone@idq.com	Franchise Developer: South Central Region
			Tom Trocchio	952-896-2541	tom.trocchio@idq.com	Franchise Developer: Northeast Region
			Ted Wells	952-896-2540	ted.wells@idq.com	Franchise Developer: Mid Central Region
			Jennifer Rude	952-830-0391	jennifer.rude@idq.com	Franchise Developer: Upper Midwest & Manager of Nontraditional Development
			David Bulger	952-896-2539	david.bulger@idq.com	Franchise Developer: Southeast Region
DSW	Columbus	OH	Steve Ramey	614-237-7100	steveramey@dswinc.com	South, West, Midwest
			Wayne Dornbirer	614-237-7100	waynedornbirer@dswinc.com	Northeast, Mid-Atlantic, Great Lakes
Dunham's Sports	Troy	MI	John Palmer		jpalmer@dunhamshq.com	ND, SD, NE, KS, OK, MN, WI, MI, MS, AL, GA, PA

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Andrew Shellhorse	631-219-2588	andrew.shellhorse@dunkinbrands.com	NY (Long Island/Queens)
			Chandler Tyndal	678-896-1980	chandler.tyndal@dunkinbrands.com	AL (Birmingham/Huntsville), AR (Jonesboro), TN (Chattanooga/Jackson/Knoxville/Tri-City Area)
			Chris Decre	410.652.3693	chris.decre@dunkinbrands.com	DE, NJ (Southern), PA (Philadelphia, Chester, Delaware, Scranton, Wilkes-Barre)
			Channing Lackland	214-551-3642	channing.lackland@dunkinbrands.com	IA, KS, MO (Kansas City/St. Joes/Springfield), NE, NM, TX (West)
			Christine Minerella	781-686-5838	christine.minerella@dunkinbrands.com	AZ, CO (Colorado Springs/Denver), NV (Las Vegas), UT
			Debra Vickers	410-200-1645	debra.vickers@dunkinbrands.com	NC (Greensboro), SC
			Ed Orouke	331-262-7895	ed.orourke@dunkinbrands.com	IL (Chicago-North/West Suburbs/Rockford)
			Ivan Abreu	619-361-9043	ivan.abreu@dunkinbrands.com	AK, CA (High Desert/San Diego), HI
			Jason Askinosie	310-968-9980	jason.askinosie@dunkinbrands.com	CA (LA/Orange County/Southern CA/Ventura), HI
			Jeff Zavoral	630-319-3158	jeff.zavoral@dunkinbrands.com	IA, MN, WY
			Jerry Overmyer	585-749-4492	jerry.overmyer@dunkinbrands.com	NY (Albany/Binghamton/Buffalo/Elmira/Plattsburgh, Rochester/Syracuse/Troy/Utica/Watertown)
			Jim Doherty	508-455-7708	jim.doherty@dunkinbrands.com	CT, MA (West), RI
			Joe O'Mara	815-530-6659	joe.o'mara@dunkinbrands.com	IN, KY, MI, OH (Lima/Toledo)
			John Dart	504-708-1708	john.dart@dunkinbrands.com	AL (Mobile/Montgomery), AR, LA, MS, OK (Tulsa), TN (Memphis)
			Lance Gianquinto	856-296-0280	lance.gianquinto@dunkinbrands.com	NC (Raleigh), VA (Norfolk/Richmond/Roanoke)
			Larry Harris	440-241-2803	larry.harris@dunkinbrands.com	OH, PA (Erie/Pittsburgh/Youngstown), WV
			LaShelle London	708-305-8249	lashelle.london@dunkinbrands.com	IL (Chicago/South Suburbs/Bloomington/Champaign/Normal/Peoria/Urbana)
			Mark Mead	470-955-3259	mark.mead@dunkinbrands.com	AL (Albany/Atlanta/Columbus/Macon), FL (Panama City), GA (Albany/Columbus/Macon/Augusta/Savannah)
			Matt Green	516-242-6787	matt.green@dunkinbrands.com	NY (Brooklyn/Manhattan)
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			Mike Rose	718-809-8662	mike.rose@dunkinbrands.com	FL (Ft. Myers/Gainesville/Tampa/Tallahassee)

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Richard Pastore	914-672-0141	richard.pastore@dunkinbrands.com	CT (Fairfield County), NY (Bronx/Dutchess/Putnam/Orange/Sullivan/Ulster/Westchester/Rockland), PA (Pike)
			Richard Hehmeyer	973-934-5193	richard.hehmeyer@dunkinbrands.com	PA (Altoona/Johnston), VA (Northern), Wash DC
			Sai Reddy	404-858-8683	sai.reddy@dunkinbrands.com	GA (Atlanta)
			Samantha Jupe	214-460-9823	samantha.jupe@dunkinbrands.com	TX (East Texas, Houston, Beaumont, Rio Grande Valley, SA, CC, El Paso), OK
			Laurie New	951-206-7634	laurie.new@dunkinbrands.com	CA (Burbank/Central CA/Glendale/Inland Empire/Monterey/Palm Springs/Pasadena/Santa Clarita/San Jose)
			Bob Turner	248.390.4000	bob.turner@dunkinbrands.com	FL (Jacksonville/Orlando)
			Ed Williams	614.774.0162	ed.williams@dunkinbrands.com	CA (Northern/Sacramento/San Francisco), NV (Reno)
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Erwin Pearl	New York	NY	Steve Cantwell	212-889-7410	scantwell@eppearl.com	Director of Retail Stores/Real Estate
Express Oil Change & Tire Engineers			Jeff Yetter	205-724-9443	jyetter@expressoil.com	Vice President of Real Estate
Family Dollar	Highlands Ranch	CO	Bruce Walters	757-321-5196	bawalters@familydollar.com	Chief Development Officer
			Lorie Williams	704-708-1966	lwilliams3@familydollar.com	Director - Portfolio Management
			Tom Widmeyer	513-527-4997	twidmeyer@familydollar.com	Regional Director - Midwest
			Dean Koutroumanis	813-624-4620	dkoutroumanis@familydollar.com	Regional Director - SouthEast
			Mike Furr	936-645-7264	mfurr@familydollar.com	Regional Director - West
			Rick Caynor	757-321-5472	rcaynor@dollartree.com	Regional Director - Northeast
			Steve Heaps	801-830-1954	sheaps@familydollar.com	ID, MT, WY, UT, CO, AZ, NM
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			Rence Jones	843-422-4121	cjones3@familydollar.com	Southern Florida, SC, West NC
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			John Zelen	704-999-0676	jzelen@familydollar.com	ND, SD, NE, KS, North OK, MN, IA, MO
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Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Pat Senn	678-776-1000	psenn@familydollar.com	North AL, GA, No FL, West NC
			Bobby Dickey	901-299-9188	bdickey@familydollar.com	VA, MD, DE, NJ, PA
			John Ort	512-569-0300	jort@familydollar.com	S. Texas
			Kyle Krull	704-708-2771	kknull@familydollar.com	NH, MA, VT, ME, NY, CT, RI
			Dennis Bookwalter	704-708-1736	dbookwalter@familydollar.com	Lease Renewal - Head
			Scott Armstrong	704-708-7973	sarmstrong@familydollar.com	Lease Renewal - Northeast
			Brandi Edwards	704-313-7173	bedwards@familydollar.com	Lease Renewals - South
			Richard Hillesheim	704-708-2569	rhillesheim@familydollar.com	Lease Renewals - Special Projects
			Amy Barbery	704-708-1925	abarbery@familydollar.com	Lease Renewals - Midwest
			George Ross	310-487-0881	gross@familydollar.com	NV
			Ricardo Hurtado	562-500-6105	rhurtado@familydollar.com	South CA
			Chris Williams	757-321-5174	chwilliams@dollartree.com	VP Portfolio Management
			Chris Teeter	757-321-5664	cteeter@dollartree.com	VP Leasing
			Trace Johnson	916-772-1193	trjohnson@familydollar.com	Central CA
Famous Dave's	Minnetonka	MN	Jim Schwitzer	952-294-1343	jim.schwitzer@famousdaves.com	Director of Franchise Sales & Development
Fazoli's Restaurants			Perry Pelton	913-669-1294	perry.pelton@fazolis.com	Director of Real Estate
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Firehouse Subs	Jacksonville	FL	John Namey	904-606-5138	jnamey@firehousesubs.com	VP Real Estate Services
			Kristen Alberre Akel	904-606-5180	kakel@firehousesubs.com	Director of Real Estate
			Richard Elkins	904-606-5195	richard.elkins@firehousesubs.com	Director of Construction
First Watch			Matthew Livingston	407-575-7942	mlivingston@firstwatch.com	Real Estate Director
FFO Home	Ft. Smith	AR				
Fred's, Inc.	Memphis	TN	Jeff DeGroot		jdegroot@fredsinc.com	
Freddy's Frozen Custard & Steakburgers			John Gilroy		johng@freddysusa.com	Real Estate Director
			Bo Fairbank	316-719-7848	bof@freddysusa.com	Real Estate Manager

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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Gabe's/Rugged Warehouse			Kal Gibron	304-225-7158	kal.gibron@gabes.net	SVP of Real Estate & General Counsel
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			Bree Russell	817-722-7794	breerussell@gamestop.com	Sr. Director of Real Estate
			Cristy Vertachnik	817-722-7726	cristyvertachnik@gamestop.com	Sr. Real Estate Director
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Goddard School	King of Prussia	PA	Rob Skibjak		realestate@goddardschoolsystems.com	
Golden Corral	Raleigh	NC	Glen Kinkade	919-624-4120	gkinkade@goldencorral.net	AR, AZ, CA, CO, IA, ID, IL, KS, LA, MI, MN, MO, MT, ND, NE, NM, NV, OK, OR, SD, TX, UT, WA, WI, WY
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			Sara Chaiken	248-917-1791	sara.chaiken@greatclips.com	Great Lakes
			Amy Blenker	612-310-6506	amy.blenker@greatclips.com	VA, KY, WV, NC, SC
			Nate Ohme	952-746-6416	nate.ohme@greatclips.com	Upper Midwest
			Wayland Benbow	203-314-5447	wayland.benbow@greatclips.com	Northeast

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Jodie Womack	818-309-6794	jwomack@harborfreight.com	Director of Real Estate - Central/Mid-Atlantic - IA, MO, AR, WI, IL, MI, IN, OH, KY, TN, NC, SC
			Bill Gerhardt	818-201-8748	bgerhardt@harborfreight.com	Director of Real Estate - East - VA, WV, DC, DE, MD, NJ, PA, NY, VT, NH, ME, MA, CT, RI
			Steve Bayton	602-618-3517	sbayton@harborfreight.com	Director of Real Estate - West - WA, OR, CA, ID, NV, AZ, NM, UT, MT, WY, CO, ND, SD, NE, KS, OK, MN
Heartland Dental	Effingham	IL	John Collier	866-340-6318	realestate@heartland.com	Real Estate Manager
			Brandon Weber			Senior Real Estate Analyst
			Doug Jansen			Real Estate Analyst
			Jake Niebrugge			Director of Development
hhgregg	Indianapolis	IN	Bruce Dixon			
Hibbett Sports	Birmingham	AL	Jeff Gray	205-942-4292x7267	jeff.gray@hibbett.com	VP - Real Estate
			Sam Killian	205-942-4292x7368	Sam.Killian@hibbett.com	Real Estate Director - AL, AR, AZ, DE, FL, GA, LA, MD, MS, NJ, NM, NV, NY, OH, OK, PA, TX, WV, WY
			Brad Walton	x7226	brad.walton@hibbett.com	Real Estate Manager - CA, CO, IA, IL, IN, KS, KY, MN, MO, NC, NE, SC, SD, TN, UT, VA, WI
			Tiffany Kilpatrick	205-942-4292x7223	Tiffany.Kilpatrick@hibbett.com	Real Estate Manager - City Gear - AL, AR, FL, GA, IL, IN, KS, KY, LA, MO, MS, OH, OK, TN, TX
			Jamie Edmonson	x7327	jamie.edmonson@hibbett.com	Portfolio Director
			Steve Kowal	x7231	steve.kowal@hibbett.com	VP - Construction & Property Management
Hooter's of America, Inc.	Atlanta	GA	Janet Kearns		jkearns@hooters.com	
			Bob Browning	202-742-1106	bob.browning@colliers.com	
			Robert Hantgan	713-530-2178	robert.hantgan@colliers.com	
Hobby Lobby	OKC	OK	Scott Nelson	405-745-1607	scott.nelson@hobbylobby.com	West
			Matt Abnet		matthew.abnet@hobbylobby.com	Eastern Seaboard
			Les Miller		les.miller@hobbylobby.com	Southeast
			Brooks McMillan		brooks.mcmillan@hobbylobby.com	Upper Midwest
Home Depot	Atlanta	GA	Jim McCarthy	770-443-8211	jim_mccarthy@homedepot.com	Senior Director of Real Estate

Real Estate Contacts Cont.

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			Al Boschen		al_boschen@homedepot.com	Director of Real Estate- Canada/Industrial
			Art Barnes			Director of Construction
			Mary Beth Lamoree			Director Property Management
			Neil Danville	770-384-4515		NoCal, NV, UT, WY, CO, NM, AZ
			Trey Conway	770-384-4177		Cen/SoCal, Guam, SE NM, TX, OK, AR, No LA
			Renee Janssen	770-384-3868		NY Metro, CT, RI, MA, NH, VT, ME
			Kim Koenig	770-384-2420		AK, WA, OR, MT, ID, ND, SD, NE, MN, IA, MO, WI, IL, IN, NW KY, MI
			Tom Gallagher	732-926-3665		OH, PA, NY, NJ, DE, DC, MD
			Chandler Johnson	770-384-2864		S. LA, MS, AL, GA, FL, SC, NC, TN, KY, WV, VA, PR, USVI
Hy-Vee Food Stores	West Des Moines	IA	Pete Hosch	515-327-2147	phosch@hy-vee.com	
Ingles Markets	Black Mountain	NC	Randolph Jameson	828-669-2941	rjameson@ingles-markets.com	
In-N-Out Burger	Baldwin Park	CA	Mike Bailey		mbailey@innout.com	
		CA	Josie Auer	310-910-4967	jauer@innout.com	Senior Real Estate Manager Southern CA and NV
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Innovative Mattress Solutions	Lexington	KY	Steve Blair	304-586-2863	sblair@sleeponthebest.com	
Inspire Brands (Arby's, BWW, R Taco)			Greg Darus	314-406-2849	gdarus@buffalowildwings.com	Vice President of Real Estate
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Real Estate Contacts Cont.

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Real Estate Contacts Cont.

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			Patrick Turek	314-698-6148		WA, OR, CA, NV, MT, AZ, CO, MN, IA, MO, KS, TX, MS, TN, WV, PA, MI
			Dan Frith	314-378-7524		NE, SD, IA, MO, IL, IN, KY

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
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			Tim O'Kane	714-316-4296		WA, OR, ID, CA, AZ
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			Steve Kibler	404-698-7536		Non-Traditional
Papa Murphy's	Vancouver	WA	Jon Fischer	360-449-4060	jon.fischer@papamurphys.com	VP Development
			John Rose	602-300-3096	john.rose@papamurphys.com	National Real Estate Director
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Party City	Rockaway	NJ	Doug Calvin	973-453-8810	dcalvin@partycity.com	NYC, MI, AZ, NM
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			Lynn Mancini	201-919-1785	lmancini@partycity.com	ME, NH, VT, MA, CT, RI, IN, MO, NY, VA, WV, MD, DE, DC, IL, MN, ND, SD
			Adam Eichberg	973-453-8922	aeichberg@partycity.com	NJ, NY, PA, OH, FL, NC, SC, TN, GA, WI
			Vicky Chastain	862-248-4913	vchastain@partycity.com	OR, NE, IA, KS, OK, TX, CA
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PepBoys	Philadelphia	PA	Joe Walsh	215-430-9388	joe_walsh@pepboys.com	TX, MD, MA, VT, CT
			Mark Hahn	850-455-7720	mark_hahn@pepboys.com	AL, GA, FL
			Nicholas Puccio	760-215-9372	nicholas_puccio@pepboys.com	CA
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			Tony Delguyd	440-473-4322	Anthony_delguyd@pepboys.com	IL, NC, SC, NY
Petco Animal Supplies	San Diego	CA	Jim Lampassi	858-677-3030		
Pet Supplies Plus	Livonia	MI	Josh Goldstein		jgoldstein@petsuppliesplus.com	
Pier 1 imports	Ft. Worth	TX	Bill Biskamp	817-252-8829	wtbiskamp@pier1.com	
Planet Fitness	Newington	NH	Ray Miolla		ray.miolla@pfhq.com	Chief Development Officer
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			Christie Routhier		christie.routhier@pfhq.com	Manager, Real Estate
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			Max Williams		max.williams@pfhq.com	Real Estate Manager, West
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Real Estate Contacts Cont.

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			Keith King		Keith.king@pfhq.com	Director of Real Estate - south
			Maura Gallagher		maura.gallagher@pfhq.com	Real Estate Specialist, South
Pollo Tropical	Miami	FL	Glenn Rozansky	305-670-7696	grozansky@pollotropical.com	
Popeyes			Vanilla Mcintosh	832-660-7874	vmcintosh@rbi.com	WA, OR, CA, NV, ID, UT, AZ, NM, CO, WY, MT, ND, SD, NE, OK, TX
			Kefhira Pintos	786-202-1085	kpintos@rbi.com	KS, MN, IA, MO, AR, LA, MS, TN, IL, WI, MI, IN, OH, KY, AL
			Lawrence BenBassett	301-613-7965	lawrence.benbassett@rbi.com	FL, GA, SC, NC, VA, WV, DC, MD, PA, DE, NJ, CT, NY, RI, MA, VT, NH, ME
			Gui Loicono	305-495-3304	gloiacono@rbi.com	Non Traditional
Primrose Schools	Acworth	GA	William Pierquet	770-529-4100	bpierquet@primroseschools.com	Head of Real Estate
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Price Chopper	Schenectady	NY	Tom Hayden	518-379-1708	tomhayden@pricechopper.com	
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Publix	Lakeland	FL	John Harmon	863-499-8496	john.harmon@publix.com	South Florida
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Qdoba			Bill Robards		bill.robardsjr@jackinthebox.com	WA, OR, KS, NB, ID, MT, HI, WY, UT, NV, ND, SD

Real Estate Contacts Cont.

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			Dan Pellissier		dan.pellissier@qdoba.com	IA, WI, MI, IN, OH, KY, TN, MS, AL, GA, FL (PH)
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QuikTrip	Tulsa	OK	Jake Barron	918-615-7088	jbarron@quiktrip.com	Tulsa, Ok
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			Tim Long	704-559-8013	tlong@quiktrip.com	Charlotte, NC
RaceTrac	Atlanta	GA	Thomas Edwards	817-786-3177	tedwards@quiktrip.com	DFW
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			Craig Romrell	704-307-8703	cromrell@quiktrip.com	Denver
RaceTrac	Atlanta	GA	Sean MacLaurin	770-431-7600	smaclaurin@racetrac.com	
Red Robin	Castle Rock	CO	Todd Brighton	303-846-6033	tbrighton@redrobin.com	

Real Estate Contacts Cont.

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			Cindy Homeyer	949-367-0381x201	chomeyer@riteaid.com	Lease Administration
			Kristy Weber	717-761-2633 x5100	kwebster@riteaid.com	Surplus/Dispositions
Ross Stores, Inc.	Pleasanton	CA	Gregg McGillis	925-965-4764	gregg.mcgillis@ros.com	
			Richard Lietz	925-965-4890	richard.lietz@ros.com	IA, IL, IN, KS, Western MO, ND, NE, SD, WI
			Jack Toth	925-965-4778	jack.toth@ros.com	AL, AR, KY, LA, Eastern MO, MS, OK, Houston TX
			Jeff Sealy	925-965-4832	jeff.sealy@ros.com	Southern CA
			Michael Udekwu	925-965-4098	michael.udekwu@ros.com	Northern CA
			Mike Smith	925-965-4686	Mike.cmith@ros.com	DE, MD, NC, NJ, PA, SC, TN, VA
			Julie Leverton	925-965-4302	julie.leverton@ros.com	AZ, NM, TX
			Jac Gee	772-207-7557	jac.gee@ros.com	FL, GA
			Mike Raphael	925-965-4043	mike.rafael@ros.com	CO, ID, MT, NV, OR, UT, WA, WY
Safelite Auto Glass	Columbus	OH	James Randolph	614-210-9369	randy.randolph@safelite.com	VP Real Estate and Market Development
Sally Beauty Supply	Denton	TX	Todd Boysen		tboysen@sallybeauty.com	Senior Director of Real Estate
			Trent Endres		tendres@sallybeauty.com	Senior Manager of Real Estate
			Jacqueline Tapella	940-297-4675	jtapella@sallybeauty.com	New Stores - CO, NM, OK, TX, AR, LA, TN, MS, AL, GA, FL, NC, SC
			Mandy Hunter	940-297-4563	mhunter@sallybeauty.com	Renewals - CO, NM, OK, TX, AR, LA, TN, MS, AL, GA, FL, NC, SC
			Cathy Richards	940-297-4953	crichards@sallybeauty.com	New Stores - Canada, WA, OR, CA, NV, UT, AZ, ID, MT, WY, ND, SD, NE, KS, MN, IA, MO
			Terry Kunz	940-297-4341	tkunz@sallybeauty.com	Renewals - Canada, WA, OR, CA, NV, UT, AZ, ID, MT, WY, ND, SD, NE, KS, MN, IA, MO
			Nicole Curtis	940-297-4930	ncurtis@sallybeauty.com	New Stores - WI, MI, IL, IN, OH, KY, WV, VA, PA, NY, MD, DE, NJ, CT, MA, VT, NH, ME
			Rachel Brittian	940-297-4852	rbrittian@sallybeauty.com	Renewals - WI, MI, IL, IN, OH, KY, WV, VA, PA, NY, MD, DE, NJ, CT, MA, VT, NH, ME
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Real Estate Contacts Cont.

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			Cameron Setian	314-610-1820	cameron.setian@savealot.com	AR, LA, MS, AL, GA, SC, FL
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			Jacob Eganhouse	314-307-4558	jacob.eganhouse@savealot.com	CO, KS, OK, TX, MN, IA, MO, WI, IL, MI, IN, OH, KY, TN
			John Jackson	314-413-2914	john.jackson@savealot.com	CO, KS, OK, TX, MN, IA, MO, WI, IL, MI, IN, OH, KY, TN
			Nick Bender	314-712-3263	nicholas.bender@savealot.com	CO, KS, OK, TX, MN, IA, MO, WI, IL, MI, IN, OH, KY, TN
Schlotzsky's Austin Eatery	Atlanta	GA	Sheri Ferravante	404-705-2051	sferravante@focusbrands.com	Franchising Contact
			Freddy Luster	404-379-1970	freddyluster@focusbrands.com	Director of Real Estate
Scooter's Coffee	Omaha	NE	Carolyn Snider	877-494-7004	carolyn.snider@scooterscoffee.com	
Sephora			Jeff Gaul	877-737-4672 x1004		SVP of Real Estate & Store Development
Shaw's Supermarket	West Bridgewater	MA	Steve Jenkins	508-313-4612	steven.jenkins@shaws.com	
Sheetz	Altoona	PA	Steve Augustine	814-941-5110	saugustine@sheetz.com	
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Sherwin Williams	Cleveland	OH	Ray Starbuck	214-553-2972	rstarbuck@sherwin.com	
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Shoe Carnival	Evansville	IN	Jeff Fink	812-402-2608	jfink@scvl.com	MT, ID, WY, UT, CO, ND, SD, NE, MN, IA, WI, KY, TN, GA, SC, NC, VA, MD, DE, ND, E PA, E NY, CT, RI, MA, NH, VT, ME, AK, HI, PR
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Smart & Final Stores	Commerce	CA	Tony Bernardini	323-869-7750	tony.bernardini@smartandfinal.com	
Smoothie King	Dallas	TX	Chris De Wolff	404-401-7973	chrisdewolff@smoothieking.com	NY, CT, RI, PA, NJ, MD, DE, DC, WV, VA, NC, SC, GA, FL

Real Estate Contacts Cont.

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Speedway			Joanna Pasnau	405-305-1886	joanna.pasnau@sonicdrivein.com	LA, MS, AL, TN, GA, NC, SC
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Sport Clips	Georgetown	TX	Shea Laffere	469-236-0918	shea.laffere@sportclips.com	Real Estate Director - AZ, CA (Northern/ Central Valley/Northern LA), FL (Panhandle), GA (Atlanta), HI, KY (Louisville & Lexington), LA, MS, NV (Reno), TN

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			Mark Mansfield	214-454-8864	mark.mansfield@sportsclips.com	NM, TX (DFW/EI Paso/Panhandle)
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			Cari Loveless			Store Development - Pacific Northwest
			Beverly Metz			Store Development - LA/Central California
			Charlie Arbing			Store Development - Southern California & Hawaii
			Owen Hutchison			Store Development - South Central
			Dawn Rheinlander			Store Development - Western Mountain
			Dean Klein			Store Development - Midwest (Chicago)
			Kate Feuti			Store Development - Northeast (Boston)
			Dan Shallit			Store Development - NYC
			John Bell			Store Development - Mid-Atlantic
			Warner Walker			Store Development - Southeast (Atlanta)
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			Karen Parrot			National Malls Portfolio
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Regis Corporation (Supercuts, Cost Cutters, Roosers & First Choice Haircutters)	Minneapolis	MN	Bert Trolesi	562-432-6927	bert.trolesi@regiscorp.com	MT,WA,OR,ID,WY,NV,UT,AZ,CA
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Taco Bell	Irvine	CA	Basil Kazepis	914-774-1000	basil.kazepis@yum.com	Director of Development - East
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			Mike Kelly	732-496-3030	michael.kelly@yum.com	OH, PA, Upstate NY, NH, DE, VA, ND, SD, NE, MN, IA, WI, MI, IL (Northern), IN (Northern)
			Heather Jacobson	214-649-7220	heather.jacobson@yum.com	Director of Development - West NM, CO, AZ, TX, LA
			Ryan Huo	949-863-2864	ryan.huo@yum.com	WA, OR, CA, NV, UT, ID, MT, WY
			Chad Harper	502-874-2487	chad.harper@yum.com	KS, OK, MO, AR, IL (Southern), IN (Southern), WV, KY, TN, MS, AL
			Julie Krupa	919-818-0522	julie.krupa@yum.com	NC, SC, GA, FL
			Jonathan Trapesonian	949-863-3605	jonathan.trapesonian@yum.com	Director of Development - Company Markets
			Cindy Frye	817-312-0020	cindy.frye@yum.com	Company Markets: Atlanta, Bakersfield, El Paso, Houston, Los Angeles, Miami, Orlando, DC, Palm Beach
			Sue Harrod	502-874-8584	sue.harrod@yum.com	Company Markets: Charlotte, Cleveland, Detroit, Flint, Indianapolis, Knoxville, Norfolk, Toledo
			Stephanie Werther		stephanie.werther@yum.com	Company Markets: Chicago, Manhattan
Take 5 Oil Change	Metairie	LA	Wilson Blum	504-837-0670	wilson@take5oilchange.com	
Target	Minneapolis	MN	Gregg Steinhafel	612-761-2072		
			Scott Peterkin	612-761-6793	Scott.Peterkin@target.com	Outparcel Disposition Program
The Fresh Market	Greensboro	NC	James Dewey	336-272-1338		
The Grocery Outlet	Emeryville	CA	Brian McAndrews	510-379-2167	bmcandrews@cfgo.com	SVP Store Development
			Marc Drasin	510-704-2819	mdrasin@cfgo.com	VP Real Estate - CA (Bay Area), San Diego (CA), ID, OR, WA, PA
			Bill Coyle			VP Real Estate- N. CA, C. CA, Greater LA, NV
			Pat Barber	626-826-4946	pbarber@cfgo.com	

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The Joint Chiropractic	Scottsdale	AZ	Kala Caddell	480-245-5960 x222	kala.caddell@thejoint.com	
The Learning Experience	Boca Raton	FL	Chad Weissman	561-886-6400	cweissman@tlecorp.com	TX, WA, CT, OR, CO, VA, OH, NM, NV & Canada
			Nick Vanella	561-886-6410	nvanella@tlecorp.com	NJ, PA, NC, IL, MA, MI, FL, TN, NH, DE, NY, MD, CA, MO, NV, KS
			Louay Akil	862-849-6070	lakil@tlecorp.com	TX (Harris County, Austin), CA (Los Angeles, Orange, Riverside, San Diego), Phoenix
			Anne Ewing	561-886-6387	aewing@tlecorp.com	SVP - Center Development - US, Canada & UK
			Jeannie Cave	561-886-6400	jcave@tlecorp.com	Sr. Director Construction & Center Development
Thorntons	Louisville	KY	Dennis Somers	502-425-8022	dennis.somers@thorntonsinc.com	Land Acquistiions
TJX Companies, Inc. (TJ Maxx, HomeGoods & Marshalls)		TX	Tom Miller	330-707-1785	tom_miller@tjx.com	Regional Real Estate Director- OH, IN, WV, W. PA, KY, MI
			Kelly Dishman	817-732-7800	kelly_dishman@tjx.com	AVP- Sr. Regional Real Estate Director- CO, NM, OK, TX, AR, WY
			Tami DeFrank	775-298-7017	tami_defrank@tjx.com	Regional Real Estate Director- CA (N. of Bakersfield), NV, OR, WA
			Gail Adler	312-243-9000	gail_adler@tjx.com	AVP- Sr. Regional Real Estate Director- WI, IL, NYC, ND, SD, MI
			Andrew Crocker	774-308-2235	andrew_crocker@tjx.com	AVP- Sr. Regional Real Estate Director- CT, MA, ME, NH, RI, VT
			Bob Flanagan	774-308-5518	robert_flanagan@tjx.com	Regional Real Estate Director- NJ, NY, DE
			Mark Hernon	330-707-1784	mark_hernon@tjx.com	AVP- SR. Regional Real Estate Director- AK, DC, MD
			Tom Maroney	508-816-6441	thomas_maroney@tjx.com	Regional Real Estate Director- IA, KS, MO, NC, NE, SC, VA
			Keith Schantz	352-332-4388	keith_schantz@tjx.com	AVP- SR. Regional Real Estate Director- AL, FL, GA, LA, MS, PR, TN
			Tom Mahoney	858-369-0933	tom_mahoney@tjx.com	Regional Real Estate Director- AZ, CA- South of Reno, ID, MT, South NV, ID
Tommy's Express			Deb Holmsen	714-241-8881	deborah_holmsen@tjx.com	AVP- SR. Regional Real Estate Director- HI
			Robin Muir	806-570-2874	robinm@tommys-express.com	
Tops Markets	Buffalo	NY	Tom Fitzgerald	716-635-5130	tfitzgerald@topsmarkets.com	
Trader Joe's				626-599-3700		

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Tropical Smoothie Café	Atlanta	GA	Melissa Tinsley		mtinsley@tropicalssmoothie.com	OR, CA,NV, AZ,NM, TX,OK,AR
			Kyley Yanker		kyanker@tropicalssmoothie.com	WA,ID, UT, MT, WY, SD, ND, NE, KS, MO, IA, MN, WI, IL, IN, OH, KY, NC
			Kristen Klein		kklein@tropicalssmoothie.com	CO,MI,ME,VT,NH,MA,RI,CT,NJ,DE,MD,DC,PA,NY, WV,VA
			Don Tomberlin		dtomberlin@tropicalssmoothie.com	FL,SC,TN,LA,MS,AL,GA
The UPS Store			Chad Cantrell		chadcantrell@upsstore.com	National Real Estate Director
			Mark Johnson		markjohnson@upsstore.com	Real Estate Manager - Eastern US
			Alyssa Kehrig		akehrig@upsstore.com	Real Estate Manager - Central US
			Patrick Carpenter	858-597-8508	pcarpenter@upsstore.com	National Real Estate Director; Western US
Tuffy Auto Service Center	Toledo	OH	David Schak	419-865-6900	dave@tuffy.com	
UFC GYM			Bill Oughton			VP of Real Estate
Ulta	Scottsdale	AZ	Rick Franz	480-344-7710	rick.franz@ulta.com	VP Real Estate
			David Krueger	630-378-7203	dkrueger@ulta.com	SVP Growth & Development
			Pam Lent	916-435-0300	plent@ulta.com	VP Real Estate
			Casey Hartl	952-977-9148	chartl@ulta.com	VP Real Estate
			Maria Bunstine	718-361-2697	mbunstine@ulta.com	VP Real Estate
U.S. Cellular	Chicago	IL	Glen Todd	773-399-8922	glen.todd@uscellular.com	National Real Estate Manager
			Ruth Bowers	660-216-8061	ruth.bowers@uscellular.com	Retail Territory Manager- WA, OR, CA, NE, KS, OK, IA, MO, IL
			Jon Vollentine	773-399-4182	jon.vollentine@uscellular.com	Retail Territory Manager- WI, TN, NC, VA, WV, ME, ND, CT
Valvoline Instant Oil Change	Lexington	KY	Michael Schifsky	715-262-9859	mgschifsky@valvoline.com	MN, WI, MI, MO, IL, IN, OH, PA, NY
			Kalin Berger	503-783-3203	kalin.berger@valvoline.com	WA, OR, ID, NV, NM, CO
			Kermit Smith	281-943-4212	kermit.smith@valvoline.com	TX
			Chandler Johnson	404-276-9957	chandler.johnson@valvoline.com	AL, GA, TN, KY
			David Wright	864-380-4295	david.wright@valvoline.com	VA
Verizon Wireless	Basking Ridge	NJ	Rob Bedore	678-339-5034	rob.bedore@vzw.com	Real Estate Head - South East

Real Estate Contacts Cont.

Retailer	City	State	Contact	Phone	Email	Territory
			Joseph Juliani	603-621-6740	joseph.juliani@vzw.com	Real Estate Head - South Central
			Liz Johnson	949-286-6427	elizabeth.johnson5@verizonwireless.com	Real Estate Head - Pacific Market & North Central Market
			John Real	646-265-4318	john.real@vzw.com	Real Estate Head - Great Lakes OH, PA, WV
			Dennis Colton	201-259-4311	dennis.colton@vzw.com	North East- New store site selection
			Diane Maraventano	908-507-9819	Diane.maraventano@vzw.com	North East- existing store inquiries
			Kristen Gamsby	973-903-0701	kristen.gamsby@vzw.com	North East- National LL's
			Abby Huls	813-615-4694	abby.huls@vzw.com	South East - New store site selection
			Paul Hafer	561-400-9837	paul.hafer@vzw.com	FL, GA, TN Existing store inquiries
			Rob Bedore	678-339-5034	rob.bedore@vzw.com	NC, SC Existing store inquiries
			Chris Neher	925-708-4349	christopher.neher2@vzw.com	Central & North Cali/Reno, NV
			Andy Edwards	913-530-5306	andrewg.edwards@vzw.com	AK, HI, OR, WA / CO, ID, MT, UT, WY
			Nancy Gardiner	480-763-6651	nancy.gardiner@vzw.com	Southern Cali / NE, ND, SD, AZ, NM, Las Vegas
			Eileen Engels	763-595-2411	eileen.engels@vzw.com	IA, KS, MN, MO, southern IL, WI
			Bill Hines	248-915-3720	william.hines2@vzw.com	IN, KY, MI, South OH,
			Mark Ferguson	412-527-5586	mark.ferguson2@vzw.com	IL, North OH
			Robyn Brooks	713-219-8127	robyn.brooks@vzw.com	South Central - new store site selection
			Trina Lowmaster	214-287-3028	trina.lowmaster@vzw.com	South Central - existing store inquiries
Wakefern Food Corporation			Andrew Pittel	732-906-5120	andrew.pittel@wakefern.com	Manager of Real Estate
Walgreens	Deerfield	IL	Tom Connolly	847-315-2569	tom.connolly@walgreens.com	
			Didier Glattard	847-315-3792	didier@glattard@walgreens.com	MD, DE, DC, VA, WV, PA, MI, NJ (Southern), OH (Toledo/Youngstown)
WaWa	Wawa	PA	Chris Gormley		christopher.gormley@wawa.com	PA (Bucks, Carbon, Lehigh, Luzerne, Monroe Montgomery & Northampton Counties)
			Frank Marciano		frank.marciano@wawa.com	PA (Berks, Chester, Delaware & Lancaster Counties), NJ (Camden, Cape May, Cumberland, Gloucester & Salem Counties)
			Christina Zipf		christina.zipf@wawa.com	PA (Philadelphia County)
			Jim Pilla		james.pilla@wawa.com	NJ (Atlantic, Bergen, Essex, Hudson, Monmouth, Morris, Ocean & Union Counties)
			Lindsay Trimarchi		lindsay.trimarchi@wawa.com	NJ (Burlington, Hunterdon, Mercer, Middlesex, Passaic, Somerset, Sussex & Warren Counties)

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			Tom Bryden		thomas.w.bryden@wawa.com	Construction
			Betty Lindberg		elizabeth.lindberg@wawa.com	Surplus Property
Wegmans	Rochester	NY	Paul Gilber	585-464-4755	paul.gilbert@wegmans.com	
Wendy's	Dublin	OH	Angela Coppler	614-760-2025	angela.coppler@wendys.com	Sr. Director - Non-Traditional Development & Franchise Recruiting
			Larry Spanski	614-764-4271	larry.spanski@wendys.com	Development Director - Midwest & National Director - Asset Manager
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			Russ Smith	801-209-2728	russ.smith@wendys.com	Development Director - West
			Michelle Ryman	678-361-8931	michelle.ryman@wendys.com	Development Director - East
			Kathy Seferian	949-201-7046	kathy.seferian@wendys.com	OR, CA, NV
			Todd Phelps	303-809-9170	todd.phelps@wendys.com	AZ, MT, ID, UT, WY, CO, NM, NE, SD, ND, MN, IA, WA,
			Clark Elms	214-926-6700	clark.elms@wendys.com	KS, OK, AR, LA, TX
			Genevieve Chenoweth	647-464-6096	genevieve_chenoweth@wendys.com	East Canada
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			Mike Mcdermott	203-248-2144	michael.mcdermott@wendys.com	EAST PA, EAST NY, NJ, VT, NM, ME, MA, CT, RI
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Which Wich	Dallas	TX	Matt Kennedy	214-747-9424x1075	MKennedy@whichwich.com	Real Estate Manager
Whole Foods	Austin	TX	Paul Hilliard	512-542-0216	paul.hilliard@wholefoods.com	Central & Western U.S.
Yoshinoya	Torrence	CA	Tod Holloway	310-217-2147	tod.holloway@yoshinoyaamerica.com	
Zaxby's	Athens	GA	Tommy Mitchell	706-433-2289	tmitchell@zaxbys.com	Real Estate Consultant
Zoe's Kitchen	Plano	TX	Allyn Taylor	205-414-9920x250	allyntaylor@zoeskitchen.com	Chief Development Officer
			Chris Michelson	214-436-8765x4261	chrismichelson@zoeskitchen.com	AZ, CO, DE, NJ, OK, PA & TX



MEET OUR TEAM

Meet Our Team



Daniel Herrold

Senior Director

Daniel Herrold is a Senior Director in the Tulsa, office, where he has maintained various roles within the firm over his 15 year tenure at SJC. He has led teams that have completed over \$3 billion in transaction volume through his tenure with the firm across all product types. Outside of production, Herrold has played an instrumental role in senior leadership within the firm. In 2008, he successfully launched the firm's first office outside of Tulsa located in Houston, Texas, where he managed the office through its stabilization. In 2010, Herrold was promoted to Executive Managing Director, where he continued the firm's expansion by launching four additional offices located in Chicago (IL), San Francisco (CA), Los Angeles (CA) and Phoenix (AZ).

Herrold migrated back into production in 2013, where he co-founded the firm's first formal practice group – the Corporate Finance Group (“CFG”). CFG's primary focus is providing a range of services specifically to real estate operators & private equity groups, including services such as sale leasebacks, build-to-suit structuring & financing, lease advisory & restructuring & surplus property sales.

- Strategy Development & Execution
- Business Development
- Client Advisory

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Campbell Black

Associate Director

With 10+ years of capital markets experience, Mr. Black is primarily responsible for originating and executing investment sales transactions throughout the United States with a focus on net lease and sale leaseback deal types. He is a part of the Corporate Finance Group, a practice within SJC that focuses primarily on owner/users of single-tenant real estate. Throughout the course of his real estate career, he has executed approx. \$1.8 billion in commercial real estate transactions. Prior to joining SJC, Mr. Black was a member of HFF's Single Tenant Investment Sales platform.

- Deal Origination & Execution
- Portfolio Analytics

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Austin Duff

Associate

Austin Duff is an associate with Stan Johnson Company's Corporate Finance Group based in Chicago, where he specializes in single tenant and multi-tenant retail, office and industrial net lease properties throughout the United States. He is primarily responsible for originating and executing investment sales, sale leaseback and structured capital markets transactions. Austin works with a broad range of investor profiles including private equity funds, REITs, institutional asset managers, corporate occupiers, developers and individual private investors where he provides advisory services regarding all facets of net lease properties.

- Business Development
- Deal Origination
- Transaction Execution

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Donica Webb

Operations Analyst

Donica Webb joined Stan Johnson Company in the fall of 2013. Since joining, she has managed closings for over \$364 million in transaction volume and over 70 unique transactions. Webb is directly responsible for due diligence organization, contract negotiations, and lease reviewing. Webb's team's focus centers on Portfolio Sale Leasebacks, Lease Restructuring, Built-to-Suit, and Renovation or Expansion Capital; the diverse and complex deal structures require tremendous deal cycle management.

- Due Diligence Organization
- Contract and Lease Negotiation
- Closing Management

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beyond traditional brokerage

The Net Lease Authority®

Stan Johnson Company is the largest collaborative team in the net lease industry offering acquisition, disposition, pricing advisory and 1031 exchange services to a wide range of clients throughout the United States. Our specialization has resulted in an extensive network of brokers with insider knowledge and strong relationships – enabling us to efficiently match buyers with sellers. Drawing on a full array of brokerage and advisory services, our professionals create superior solutions for fee simple, ground lease, leasehold, sale leaseback and zero cash flow deals. As a result, we are known as the Net Lease Authority.

Collaboration

Stan Johnson Company operates on an open, collaborative platform in which we share information, trends, systems, processes and one database among all of the firm's brokers. By sharing and leveraging our collective knowledge and strengths, we are able to maximize value and exposure for our clients—a true, thorough, and complete representation of the market, unmatched by our competitors.

Specialization

Stan Johnson Company was founded upon an exclusive focus on single-tenant sales and maintains the largest team of focused single-tenant brokers in the country. As a result, Stan Johnson Company is viewed as the preeminent source of single-tenant knowledge and properties by buyers, fellow brokers and influencers across the country.

beyond experience

Stan Johnson Company consistently monitors all single-tenant investor activity through a proprietary central database system which is shared by all Stan Johnson Company professionals – including advanced analytics such as website downloads and visits. Our national network of professionals' track and share the activity of all active investors historically, in the market and those considering a net lease investment including buyers, sellers, REITs, institutions, private equity, foreign capital, lenders, tax deferred investors (1031, 1033), high net worth private investors, and family offices.

30+
Years

More than three
decades of net lease
experience

\$35B

More than 5,500
transactions exceeding
\$35 billion in volume

90+

The industry's largest
team of net lease
brokers

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going beyond

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