

# OUR MISSION

We strive to assist our clients and the clients of our network of real estate professionals in determining the best mortgage program to fit their needs and to provide professional, timely, and personal service - from application to funding and ultimately through maturity.

# ABOUT US

Excel Trust Deed Investments (formerly Excel Financial) is a family-owned mortgage lending corporation in San Jose, CA. Established in 1986, Excel has been providing professional private lending solutions for over 30 years.

## EXCEL TRUST DEED INVESTMENTS

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FORMERLY  
EXCEL FINANCIAL



CA BRE #01989442, NMLS ID #1411581



Your Premier  
Private Money Lender  
Serving the Greater  
Bay Area  
and California

[www.exceltdi.com](http://www.exceltdi.com)



# EXPERIENCED TEAM OF PROFESSIONALS

Sheldon and Diane Allen Perry and the Excel TDI team have over 70 years of combined experience in the real estate industry and leverage this knowledge to provide their clients with the best possible solution-based loans to fulfill their financial goals.



## SHELDON PERRY

Founder, VP Investment Lending

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## DIANE PERRY

Broker, President

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### Details:

- Loan-to-value ratios cannot exceed 65%
- Non-owner occupied or
- Owner-occupied short-term bridge or longer term loans
- Competitive rates
- In-house underwriting
- Short terms - usually 1 to 5 years
- Loans based primarily on equity
- In-house loan servicing

## DEAR REAL ESTATE PROFESSIONAL,

In these times of lean financing options, Excel Trust Deed Investments is your buyers' private lending source for home and investment property purchases, construction projects, vacation home financing, and commercial building purchases. We also specialize in owner-occupied bridge and business purpose loans and offer longer-term owner-occupied programs in certain cases.

With quick turnaround and minimal documentation\*, you can set those financing contingencies aside and close escrow.

Since 1986, Excel has built a solid reputation for personal, professional, and prompt service to brokers and clients alike. Don't lose clients and escrows due to tight lender requirements.

**Contact our office to see if our product fits your clients' needs.**

\* Documentation is compliant with newest federal and state disclosure and approval requirements.