



## Josh Carter, CCIM Associate Broker

**Coldwell Banker Commercial**  
**Jim Stewart, REALTORS**  
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Waco, Texas 76710

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### Experience

- Coldwell Banker Commercial Jim Stewart, REALTORS, 2002 to Present
- CCIM Designation, 2003
- The Triliji Group, 2001-2002
- Re/Max Commercial, 2000-2001

### Education

- Graduate of Baylor University (Waco, Texas), 1999
- Licensed by the Texas Real Estate Commission, 2000 (Broker License #0476150)
- CCIM Institute Courses 101-104

### Professional Designations

- CCIM "Certified Commercial Investment Member" (Certification #11129)

This is the highest degree awarded in the commercial real estate industry. A CCIM has completed a full schedule of prescribed post-graduate level courses in finance, taxation, development, site analysis, and marketing for all types of commercial and investment real estate. Only an estimated 6% of commercial real estate practitioners hold this prestigious designation.

### Professional Associations

- Member, Waco Association, Texas Association and National Association of REALTORS
- Member, Greater Waco Chamber of Commerce
- Dave Ramsey™ Endorsed Local Provider ("ELP") for Commercial Real Estate

### Civic and Social Involvement

- Current Member/Past Chairman, City of Waco Plan Commission, 2009 to Present
- Youth Soccer Coach, Waco Family YMCA
- Member, Central Texas Rifle & Pistol Club
- Past Member, Waco-McLennan County Metro Planning Organization, 2013 - 2014
- Past Member/Chairman, City of Waco Zoning Board of Adjustments, 2005 - 2009
- Past Member, City of Waco Bond Election Committee, 2007
- Alumnus, Greater Waco Chamber of Commerce "Leadership Waco" (Class XX)

### Summary

Born in Dallas, Josh is a native Texan. After attending Baylor University, Josh chose to make Waco his home. He and his wife Courtney have three children.

Josh's real estate practice is limited solely to commercial and investment properties. He has extensive experience with virtually every commercial property type, including retail, office, industrial, multi-family, restaurant, medical, raw land, and special purpose properties. Josh is also well-acquainted with a variety of transactions and projects, including acquisitions, site selection and development, leasing, sub-leasing, 1031-exchanges, dispositions, portfolios, tax assessment protests, and consulting.

### *Past Clients, Customers and Transactions Involving*

A-Z Wholesalers, Inc	The Egg & I	Mental Health Mental Retardation Center (MHMR - HOT Region)
A&A Telecom Group, Inc	El Pollo Regio	Spencer Moore, OD
Absolute Home Care	Theresa Emerson, PsyD	Muscular Dystrophy Association
Akzo Nobel Corporation	Extraco Banks, NA	Meyer Family Enterprises
All Things Possible Ministries	Evergreen Heating & Air	Oak Mortgage Group
Alliance Bank of Central Texas	Family Abuse Center of Waco	Office Essentials & Design
Antioch Community Church	Farm Bureau Insurance	Pacific Pulmonary Services
Ascension Health Ministry (Providence Hospital / Providence Healthcare Network)	Vic Feazell, Attorney at Law	Parker Hannifin Corporation
AutoPartners Insurance	First Financial Bank, NA	William Parrish, CPA
The Arrow Project Adoption Agency	Fitzgerald Lawscapers	Payment One Financial Services
Barber Equipment and Supplies of Texas	The Fletcher Bright Company	PDQ Temporary Staffing
Brazos Valley Insurance	Glass Doctor	Plato's Closet
Bank of America, NA	Glazer's Distribution, Inc	Praxair Distribution, Inc
Bayview Financial Services	Graybar Electric Company, Inc	Recept Pharmacies
Bear Mountain	The Great American Scooter Co.	Research Tax Consultants
Bergkamp, Inc	Layne Gregory, DVM	RSC Equipment Rental
Brazos Valley Insurance	Gritten Wrecker Service	S&H Oil Company
CATO Fashions	Harbor Freight Tools	Don M. Shipley, DDS
Monte Cooper, DDS	Healthcare Biomedical Services	Sonic Drive-In (Multiple sites)
Central Produce Company	Healthwise Home Health	South Central Industrial Properties
Chase Bank (Previously Bank One)	Heights Home Health	Spirit Realty Capital REIT
Cintas Corporation	Iglesia Tierra de Bendicion	Standard Insurance Agency
Custom Cakes by Laura	J&C Morin Company (McDonald's of Waco)	Standridge Development (Social Security Administration)
D-BAT	KD Foods (Long John Silver's)	State Farm Insurance
Dairy Queen of Central Texas	Kelly-Moore Paint Company	Stripes Convenience Stores
Dan Davis, DDS	Jasmine Khan, PhD, LPC	Texas Imaging Systems
Davis Insurance Agency	Hyoung Lho, OD	Texas Christian Academy
The Design Team	Lister & Associates Home Health	Vietnamese First Baptist Church of Waco
Disability Services of the Southwest	Little Caesars Pizza	Waco Baptist Academy
Dixie Paper Company	Lorena Independent School District	Waco Chiropractic and Wellness
Dollar General	Lovingkindness Ministries	Waco Independent School District
DuBois Furniture	LTD Pallet Company	Wells Fargo Bank, NA
Eagle Academies of Texas	Maids To Order of McLennan Co.	Dale Williams, DDS
East Texas Medical Center	McLane Advanced Technologies	Women's Distribution Services
E.C. Barton & Company (Surplus Warehouse)	Mental Health Grace Alliance	Charlie Wright, CPA
	Jonas Moen, MD	

### **Notable Transactions**

- 3900 Bosque Blvd** - Sale of the 125,000+/- SF Fairgate Shopping Center for Centex Asset Management to Fairgate LP; Lease negotiations with Joann Fabrics, Harbor Freight Tools, Dollar General, etc
- 2050 Bluebonnet Pkwy** - Lease and sale of a 78,000+/- SF industrial facility from Alliance Bank Central Texas to Expert Structures Corp.
- 4600 Franklin Ave** Leasing of the 47,000+/- SF Franklin Village Shopping Center to tenants such as The Egg & I, Plato's Closet, Sprint, etc.
- 7125 Sanger Ave** - Sale of a 46,000+/- SF former Winn Dixie grocery store as a re-development into a medical office complex for Waco Cardiology Associates
- 420 Borden St** - Sale of a 46,000+/- SF (16+/- Acres) school campus for Lorena Independent School District
- 4809 W Waco Dr** - Sale of a 33,500+/- SF former Linens-N-Things big box retail store to investor/user for re-development
- 601 Franklin Ave** - Sale of a 32,000+/- SF seven-story historic downtown office/apartment building ("The Praetorian") for re-development
- 4924 Fort Ave** - Sale of a 32,000+/- SF (2.84+/- Acres) manufacturing plant for Akzo Nobel Corporation
- 301 S 2nd St** - Sale of a 27,000+/- SF industrial distribution facility from Glazer's Distribution to Texas Rodco
- 3319 N 15-A St** - Sale of the 26,000+/- SF (6.6+/- Acres) former Parkview Christian Academy school campus to Waco Independent School District
- 5200 Franklin Ave** - Site selection/lease negotiation of a 24,000+/- SF retail building for Surplus Warehouse
- 800 Schroeder Dr** - Site selection/lease negotiation of a 18,750+/- SF industrial building for a food/drug-grade distribution center to Women's Distribution Services, Inc
- 3630 N IH-35** - Site selection/lease negotiation of a 17,000+/- SF industrial building to A-Z Wholesalers, Inc
- 301 S Valley Mills Dr** - Leasing of a 11,000+/- SF former Ryan's Family Steak House
- 4901 Bosque Blvd** - Sub-lease of 10,000+/- SF of 2nd floor office space from Bank of America to the Center for Occupational Research & Development
- 2800 Lyle Ave** - Sale of a 6,000+/- SF surplus medical office building for Providence Hospital to MHMR Center
- 605 S University Parks Dr** - Sale of a full-service bank facility from Spirit Realty Capital to Extraco Banks, NA
- 9515 China Spring Rd** - Sale of business and real estate (2.89+/- acres) for Clayton Automotive to S&H Oil Co.
- 5101 Lakeland Cir** - Sale of a 2.36+/- acre land tract to Standridge Development for the build-to-suit development of a new facility for the Social Security Administration
- 400 Sun Valley Blvd** - Sale of a 1.85+/- acre land tract for Pipeline Investments to Stripes LLC for the development of a new Stripes convenience store
- 1800 Mitchell Ave** - Sale of a former Long John Silver's fast food restaurant to El Pollo Regio restaurant
- 1824 W Waco Dr** - Sale and lease of a former Kentucky Fried Chicken fast food restaurant to A Cancun Rest.
- 5001 W Waco Dr** - Sale of a former Conoco-branded convenience store for re-development to 7-Eleven store
- Dollar General** - Site selection and land purchase negotiation for Dollar General / Multiple lease re-negotiations
- East Texas Medical Center** - Site selection and lease negotiations (including land purchase and build-to-suit developments) for Waco corporate office and five EMS paramedic stations
- First Financial Bank, NA** - Sales of multiple REO land tracts along the IH-35 corridor
- Kelly-Moore Paint Co.** - Marketing and leasing of various sites, including a 10-property portfolio of company-owned surplus properties throughout Texas and Oklahoma
- Praxair Distribution** - Sale of 23+/- acres of retail-industrial development land on IH-35
- Providence Hospital** - Sale of surplus medical office building / Sale of surplus unimproved land tract
- Sonic Drive-In** - Site selections, land sales, lease negotiations, and build-to-suit development for multiple stores
- Wells Fargo Bank, NA** - Facilitated multiple portfolio transactions, including the sale of multiple industrial land tracts, office-warehouse buildings, and multi-family properties



# Information About Brokerage Services

11-2-2015

Texas law requires all real estate license holders to give the following information about brokerage services to prospective buyers, tenants, sellers and landlords.

## TYPES OF REAL ESTATE LICENSE HOLDERS:

- **A BROKER** is responsible for all brokerage activities, including acts performed by sales agents sponsored by the broker.
- **A SALES AGENT** must be sponsored by a broker and works with clients on behalf of the broker.

## A BROKER'S MINIMUM DUTIES REQUIRED BY LAW (A client is the person or party that the broker represents):

- Put the interests of the client above all others, including the broker's own interests;
- Inform the client of any material information about the property or transaction received by the broker;
- Answer the client's questions and present any offer to or counter-offer from the client; and
- Treat all parties to a real estate transaction honestly and fairly.

## A LICENSE HOLDER CAN REPRESENT A PARTY IN A REAL ESTATE TRANSACTION:

**AS AGENT FOR OWNER (SELLER/LANDLORD):** The broker becomes the property owner's agent through an agreement with the owner, usually in a written listing to sell or property management agreement. An owner's agent must perform the broker's minimum duties above and must inform the owner of any material information about the property or transaction known by the agent, including information disclosed to the agent or subagent by the buyer or buyer's agent.

**AS AGENT FOR BUYER/TENANT:** The broker becomes the buyer/tenant's agent by agreeing to represent the buyer, usually through a written representation agreement. A buyer's agent must perform the broker's minimum duties above and must inform the buyer of any material information about the property or transaction known by the agent, including information disclosed to the agent by the seller or seller's agent.

**AS AGENT FOR BOTH - INTERMEDIARY:** To act as an intermediary between the parties the broker must first obtain the written agreement of *each party* to the transaction. The written agreement must state who will pay the broker and, in conspicuous bold or underlined print, set forth the broker's obligations as an intermediary. A broker who acts as an intermediary:

- Must treat all parties to the transaction impartially and fairly;
- May, with the parties' written consent, appoint a different license holder associated with the broker to each party (owner and buyer) to communicate with, provide opinions and advice to, and carry out the instructions of each party to the transaction.
- Must not, unless specifically authorized in writing to do so by the party, disclose:
  - that the owner will accept a price less than the written asking price;
  - that the buyer/tenant will pay a price greater than the price submitted in a written offer; and
  - any confidential information or any other information that a party specifically instructs the broker in writing not to disclose, unless required to do so by law.

**AS SUBAGENT:** A license holder acts as a subagent when aiding a buyer in a transaction without an agreement to represent the buyer. A subagent can assist the buyer but does not represent the buyer and must place the interests of the owner first.

## TO AVOID DISPUTES, ALL AGREEMENTS BETWEEN YOU AND A BROKER SHOULD BE IN WRITING AND CLEARLY ESTABLISH:

- The broker's duties and responsibilities to you, and your obligations under the representation agreement.
- Who will pay the broker for services provided to you, when payment will be made and how the payment will be calculated.

**LICENSE HOLDER CONTACT INFORMATION:** This notice is being provided for information purposes. It does not create an obligation for you to use the broker's services. Please acknowledge receipt of this notice below and retain a copy for your records.

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Sales Agent/Associate's Name

License No.

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Phone

Buyer/Tenant/Seller/Landlord Initials

Date

Regulated by the Texas Real Estate Commission

Information available at [www.trec.texas.gov](http://www.trec.texas.gov)

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