

**Latest Press Release
Dated: May 10, 2021**

JR Dallas Wealth Management Partners with Retirement Specialty Group for strategic investment growth.

Tennessee based, Retirement Specialty Group, a Registered Investment Advisory firm with \$40 Million in assets under management, joins JR Dallas Wealth Management. The discretionary asset management firm was looking to explore ways to further grow its assets under management and guidance in new areas of growth. JRDWM was a perfect choice. With an all-weather portfolio and long and short strategy, JR Dallas was an ideal strategic partner and mentor. "We are happy to see the enthusiasm and motivation for growth in our new strategic partner. JR Dallas strongly believes in providing growth capital and advise for young emerging managers. Looking forward to a great future together". Jehangir Raja, CEO of JRDWM.

We are excited and looking forward to getting industry insight and advise from our senior partner as we keep growing and exploring new territories. Anthony Wright, CEO Retirement Specialty Group. RSG is a Tennessee located, faith-based discretionary asset management company with \$40 Million in assets under management.

JR Dallas Wealth Management is a boutique private equity investment firm relying on the synergies and experience of its shareholders. JRDWM is a leader in financing commercial real estate throughout the United States. The company finances all types of commercial real estate, multi-family properties, affordable housing, office, retail, and industrial facilities It offers equity and private loan products. Since 2008, the company has structured more than 2.5 billion of loans and today maintains a servicing portfolio of more than \$1.8 billion. For more information about JRDWM visit website: www.jrdallaswealth.com

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JR DALLAS WEALTH MANAGEMENT



Specialty and Niche Lenders

Debt or Equity Investments in niche/specialty lending businesses.

Structured Venture Capital

Structured Investments in growing businesses

Private Equity

Controlling or non-controlling investments in businesses with strong cash flows.

Public Equity

Top-Down Approach

**JR DALLAS WEALTH
MANAGEMENT**

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**JR DALLAS WEALTH
MANAGEMENT**



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JR DALLAS WEALTH MANAGEMENT
We see opportunities others don't — and invest like others can't



JR Dallas Wealth Management boutique private equity investment firm relying on the synergies and experience of its shareholders. More than 30 years of financial and private and public equity experience of its shareholders with a proven track record of success is the competitive advantage that this firm enjoys. The success of this firm revolves around the concept that we put our money where our mouth is. Management has been created to hold the alternative investment portfolio it's of high net worth shareholders.

JR Dallas Wealth Management executes an investment strategy based on disciplined value investing principles and guided by macro-economic outlook. JR Dallas Wealth Management's major investors act as a limited partner in the investments undertaken by JR Dallas Wealth Management, and maintain a balance sheet free of any long term debt or liabilities. JR Dallas Wealth Management has identified the following target asset categories as providing the greater risk adjusted cash-on-cash and equity returns in the current economic climate.



JEHANGIR A. RAJA, MANAGING MEMBER OF THE GENERAL PARTNER

Mr. Jehangir A. ("J.A.") Raja has a long and varied business career that encompasses many segments of the investment management, private equity and related fields as well as positions in corporate finance and operations. Mr. Raja is a hedge fund manager, an entrepreneur, Wall street veteran and an accomplished financial executive. In August 2016, Mr. Raja founded JR Dallas Wealth Management, a private equity firm based in Dallas, Texas, where he serves as CEO. Since 2004,

Mr. Raja has also served as CEO of BrightWay Capital (also based in Dallas), where he has managed investments, traded equities, and led M&A and joint venture transactions.

The company was started from scratch and it raised and managed 1.2 Billion USD within a year. The company successfully invested and co invested along with firms like KKR, Carlyle Group and TPG.

Mr. Raja also acquired United Investment Managers, a Chicago based Asset Management firm with over \$300 Million under management. Prior to that, Mr. Raja was also one of the founding members of US Remodelers Inc, the company that was acquired by Home Depot and it went public in 1998. Some of the investments made were in companies like Cnooc, OGDC, and Alibaba.

Mr. Raja has over 26 years of experience in the financial industry encompassing executive leadership, equities trading, IPOs, M&As, sale of businesses, private equity placements, debt financing and financial analysis.

Mr. Raja studied graduate level Finance-Investment Analysis at St. John's University and earned an MBA from Emporia State University.

He has served on various advisory boards to companies in several industries including Commercial Finance Association (CFA), the largest commercial finance entity in the world where his fellow Directors were CEO of Wells Fargo bank and CEO of Merrill Lynch.



JR DALLAS WEALTH MANAGEMENT

[Recent Acquisitions and Press Releases](#)

JR Dallas Wealth Management enters into significant Joint Venture

Agreement with Pacifica Hospital of the Valley and Southwest Healthcare .

03/01/2021

VIVERA PHARMACEUTICALS Announces \$440 Million in Backing by JR Dallas Wealth Management

01/29/2020

JR Dallas Wealth Management hold the following companies in its portfolio .

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|--------------------------------------|---------------------------------|
| 1. Real State Burooj Holdings | 2. 316 Capital Holding |
| 3. 316 Capital properties | 4. JR Dallas Health Care |
| 5. JR Dallas Contracting | 6. JR Dallas Technology |
| 7. JR Capital | 8. JR Capital Offshore |
| 9. Sunrise Global Fund | 10. JR Multifamily Fund |

