MEETING PREP · INTERNAL

Anthony Gomez — Kyle Young — Catch Up

360 calendar · Google Meet · needsAction

Wed Sep 16 · 10:00–10:30 AM ET
Meet: var-vzot-ppj
Organizer: kyle@ys-ventures.com (accepted)
Anthony: needsAction

WHO · PUBLIC (YS-VENTURES.COM / LINKEDIN)

- **Kyle Young, CFP®** — Managing Partner & CEO, Young Strategic Ventures (YSV)
- Boutique firm: real-estate syndication / private markets · HQ Boston
- Public bio: ex-Merrill Lynch VP/CFP; practice cited >$125m AUM before YSV
- Site claims: 20+ RE projects; 115+ units / 50k+ sq ft retail+medical; >$100m RE transacted
- Contact public: contact@ys-ventures.com · 410-971-1875
- Aug 2026 LinkedIn: YSV Real Estate Fund I closed 2nd investment — 300 W Pratt St, Baltimore (Chipotle/Dunkin retail)

SNAPSHOT · RELATIONSHIP SIGNALS

- **Research thin on relationship:** no Slack hits for Kyle / YS Ventures; calendar invite has no description / agenda
- Do not invent prior deal, intro path, or ask
- Title only: “Catch Up” — purpose unknown from cal
- RSVP still needsAction — accept/decline before call
- Conflict watch: Stone/Quigley’s starts 10:30 ET in Sanford (travel buffer)

TALKING POINTS · ASKS

- Open: what prompted the catch-up? (let Kyle lead)
- Listen for: Fund I / syndication interest vs 360 Hoops intro vs personal
- No invented pitch metrics — facts only if he asks about 360
- Decide RSVP; hard stop ~10:25 for Quigley drive if keeping Stone

> **Win:** Purpose of catch-up clarified in his words; one next step owned; no invented relationship history.