

**THE LAKE SOMERVILLE RETREAT IN BURLESON  
COUNTY, TX, USA**

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# **THE LAKE SOMERVILLE RETREAT IN BURLESON COUNTY, TX, USA**

## **EXECUTIVE SUMMARY**

Coldwell Banker Commercial Southwest Partners is proud to represent the Lake Somerville Retreat in Burleson County, Texas, USA priced at \$77,000 for 10 acres (“The Retreat”).

## **HIGHLIGHTS**

- (1) Best combination of price, location, elevations, proximity to Lake Somerville and the Birch Creek State Park, privacy, area demographics, area econometrics and regional access on the market in the Houston Hampton’s market area!
- (2) 10 acres directly on State Park Road 57 with larger tract neighbors and direct walking access to Lake Somerville.
- (3) Envable quality of life with a State Park like-environment featuring a low cost of living, low density and moderate weather.
- (4) ALL minerals conveying and currently generating about a \$1,000 annual royalty.
- (5) 1.1 mi. to the Lake Somerville State Park, 14 mi. to Somerville, 20 mi. to Caldwell, 29 mi. to Brenham. 81 mi. to Austin, 86 mi. to NW Houston and 97 mi. to Waco.

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- (6) 32 mi. to suburban level services, dining, shopping, healthcare and entertainment in College Station the home of Texas A&M University with a County population exceeding 160,000.
- (7) Burleson County economy is estimated at \$440M+ in 2009 and projected to grow annually by 5.3% to exceed \$550M within 5 years.

### **CONTACT INFORMATION**

Call 979.421.9996 to contact any member of the listing team to set up an appointment, request additional information or answer any questions.

### **3% BUYER BROKER COMMISSION**

A buyer broker MUST be disclosed with the buyer's first communication with CBC for the buyer broker to be eligible for the 3% buyer broker commission.

A buyer broker does NOT have to accompany their buyer to any showings of The Retreat.

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## PROPERTY

Vacation year round and have fun in the sun at one of the most beautiful and private lakes in Texas. Spend the summer at the lake on your very own private paradise only steps away from Lake Somerville and ½-mile from Lake Somerville State Park -Birch Creek Unit. Enter the park and fish from the pier or launch your boat just seconds from home.

- (1) **Acreage.** 10.00 acres with 275' frontage on Park Road 57.
- (2) **Topography.** The Retreat elevations range from about 272' to 291'. The lake shoreline is at about 240' elevation. Great location while not being in a flood zone. This natural terrain is perfect for bike or ATV trails.
- (3) **Pond sites.** We identified at least two excellent pond locations. Professional assistance with pond design and placement is available for free from the US Department of Agriculture for a perfect pond site.
- (4) **Minerals convey.** This is probably the only small acreage offering the Houston Hampton's area that is conveying 100% minerals. The minerals generate an annual payment of about \$1,000.
- (5) **TREES!** The Retreat has hardwoods and pines throughout.
- (6) **Ag exempt.** Yes.

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- (7) **Home sites.** We identified three private and pristine home sites. Each site is secluded from public view and offer extraordinary privacy.
- (8) **Ecosystem.** Sandy soil provides a great area for horses, kids and fauna alike. Hardwoods and pines are scattered across The Retreat with many in dense groves. The Retreat features stone outcrops, rolling terrain, lichen covered stones and majestic trees located in the flora and fauna of a diverse, natural ecosystem. The Retreat is approximately 50% wooded and 50% open.
- (9) **Water.** If you prefer not to use a well or if you wish to supplement well water, The Retreat is within the Post Oak Hills water system area.
- (10) **Walk to the lake.** Since The Retreat is adjacent to Corp of Engineer property, you have a direct path to the lake. The walk is about 0.7 of a mile.

## **LAKE SOMERVILLE**

- (1) **Lake Somerville State Park.** The US Army Corps of Engineers (“USACE”) own and operate Lake Somerville. See the following for more information:

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[http://www.tpwd.state.tx.us/spdest/findadest/parks/lake\\_somerville/](http://www.tpwd.state.tx.us/spdest/findadest/parks/lake_somerville/)

- (2) **Lake Somerville State Park Trailway.** The Trailway links the Birch Creek unit to the Nails Creek unit. The Trailway features more than 26 miles of trails. The Trailway is open to hikers, mountain bikers and equestrians.
- (3) **No residential waterfront properties on the lake.** Since Lake Somerville is a USACE property and park, there are no residential water front properties. The closest you can be is adjacent to USACE land. The Retreat is adjacent and has direct access.
- (4) **Park management and wildlife protection.** Wildlife flourishes as the Texas Parks and Wildlife Department (“TPWD”) manages the area under a license agreement and in cooperation with USACE. TPWD and USACE dedicate significant resources to wildlife preservation. White tail deer, wild turkeys and a broad array of fresh water fish prosper in the area. Somerville Wildlife Management Area link:

[http://www.tpwd.state.tx.us/huntwild/hunt/wma/find\\_a\\_wma/list/?id=52](http://www.tpwd.state.tx.us/huntwild/hunt/wma/find_a_wma/list/?id=52))

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## LOCATION

- (1) **Lake Somerville access.** 1.1 mi. to Lake Somerville State Park.
- (2) **Texas Highway 36 access.** 8.1 mi. to TX 36 southbound and 10.4 mi. to TX 36 northbound.
- (3) **Regional access.** 14 mi. to Somerville, 20 mi. to Caldwell, 29 mi. to Brenham and 32 mi. to College Station.
- (4) **Suburban level services.** 31 mi. to College Station the home of Texas A&M University. With a Brazos County population of 163,000, the Bryan-College Station area features suburban level services, dining, shopping, healthcare and entertainment.
- (5) **Houston area access.** 63 mi. to Sealy, 84 mi. to Katy, 86 mi. to NW Houston (Beltway North at US 290 West), 105 mi. to downtown Houston, 106 mi. to Bellaire/Galleria area, 108 mi. to Sugarland and 122 mi. to Pearland.
- (6) **Austin area access.** 34 mi. to Round Top, 51 mi. to Bastrop, 62 mi. to Schulenberg, 81 mi. to Austin, 95 mi. to Georgetown and 111 mi. to San Marcos.
- (7) **Waco area access.** 80 mi. to Temple, 99 mi. to Waco and 101 mi. to Killeen.
- (8) **Airport access.** 32 mi. to College Station Regional (CLL) with commuter service to DFW and IAH, 84 mi. to Austin Bergstrom International (AUS), 99 mi. to Waco Regional (ACT) with

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commuter service to DFW, 109 mi. to Houston Intercontinental (IAH) and 114 mi. to Houston Hobby (HOU).

- (9) **Highway access.** 10 mi. to Texas Highway 36 northbound or southbound, 25 mi. to US Highway 290 westbound (Giddings) or eastbound (Burton), 33 mi. to Texas Highway 6 (College Station), 63 mi. to I 10 westbound (Schulenberg) and to I 10 eastbound (Sealy), 76 mi. to I 35 (Austin) and 99 mi. to I 45 (Houston).

## QUALITY OF LIFE CONSIDERATIONS

Somerville offers an enviable quality of life with a low cost living, low cost of homes, low density and moderate weather.

- (1) **Low cost of living.** The Somerville area 2008 est. cost of living is 25% below the US average. It ranks #3 in the “44 Benchmark Cities Group”\*\*. It is lower than all cities included in the “10 Comparative Cities Group”, lower than the average of the 44 Benchmark Cities Group and lower than the “5 Largest Texas Cities”\*\*\*.
- (2) **Low cost of homes.** The average 2007 home value of \$80,248 ranks #1 (lowest price) in the 44 Benchmark Cities Group. The median home value ranks #4 in the 44 Benchmark Cities Group.



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- (3) **Temperate weather.** Throughout the year, average temperatures range from about 48 to 85 degrees. In January, low temperatures are in the high 30s/low 40s with highs in the low 60s and an average temperature of 50. Summer peaks in August with lows in the low 70s, highs in the high 90s and average temperatures of about 85.
- (4) **Density.** Burleson County's 2009 density is 26 persons per square mile. Within a 3-mile radius, the 2009 density is 40 persons per square mile compared to 566 per square mile in Somerville. In 2009, Burleson County is about 32% as dense as the US, 29% as dense as the State of Texas, about 3% as dense as Travis County (Austin area) and about 1% as dense as Harris County (Houston area).

\*The "10 Comparative Cities Group" includes Somerville, Brenham, Caldwell, College Station, La Grange, Magnolia, Navasota, Sealy, Waco and Austin.

\*\*The "44 Benchmark Cities Group" is a sample of cities of similar or larger sizes in the Austin-Waco-Houston Corridor.

\*\*\*The "5 Largest Texas Cities" are Houston, Dallas, San Antonio, Austin and El Paso.

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A summary of the Quality of Life database is available on most professional websites and upon request.

## DEMOGRAPHICS & ECONOMETRICS

(1) **Local economy.** The Burleson County economy is estimated at \$440M+ in 2009 and projected to exceed \$550M within 5 years.

(2) **Population.** 2009 estimated population for Burleson County is 17,574.

The 2009 population of Somerville is 1,697, the zip code is 6,563 and at a 3-mile radius, it is 1,135.

(3) **Population growth.** 2009 to 2013, Burleson County's population is projected to grow by about 1% per year approximately equal to projected US growth.

For Somerville, the projected annual growth is 0.2%, the zip code is 0.8% and at a 3-mile radius, it is 1.5%.

At a 3-mile radius the growth rate is 50% faster than Texas, 63% faster than the County and 550% faster than Somerville.

(4) **Economic growth.** With projected annual growth of 5.3% from 2009 through 2013, Burleson County ties for # 1 compared to Adjacent Counties\*\*\*\*. For Somerville, the projected annual growth is 3.9%, the zip code is 5.1% and at a 3-mile radius, it is

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5.9%.

At a 3-mile radius the growth rate is 13% faster than the County and 51% faster than Somerville.

- (5) **Growth in average household incomes.** With projected annual growth of 2.8% from 2009 through 2013, Burleson County ties for # 2 compared to Adjacent Counties trailing only Robertson County.

For Somerville, the projected annual growth is 1.4%, the zip code is 2.5% and at a 3-mile radius, it is 3.2%.

At a 3-mile radius the growth rate is 13% faster than the County and 118% faster than Somerville.

- (6) **Growth in percent of households with at least \$100K, \$150K and \$250K annual incomes.** With projected annual growth of 36% in households with at least \$100K annual incomes, 33% in households with at least \$150K annual incomes and 41% in households with at least \$250K annual incomes from 2009 through 2013, Burleson County ties for # 2 compared to Adjacent Counties trailing only Robertson County.

- (7) **Households with at least \$100K annual incomes.** With 7.4% of households have annual incomes of at least \$100K, Burleson County ranks # 4 compared to Adjacent Counties.

For Somerville, it is 4.6%, the zip code is 6.7% and at a 3-mile radius, it is 10.7%.

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At a 3-mile radius it is 44% higher than the County and 134% higher than Somerville.

\*\*\*\*Adjacent Counties include Brazos, Burleson, Lee, Milam, Robertson and Washington.

### COUNTY RECESSION RESISTANCE

We developed a proprietary model utilizing distribution as an indicator of recession resistance of Counties. The model allocates the following 10 primary employment sectors into resistant or sensitive segments:

(1) agriculture, (2) mining, (3) construction, (4) manufacturing, (5) infrastructure (transportation, communications and utilities), (6) wholesale trade, (7) retail, (8) finance, (9) services and (10) public administration including government and not-for-profits.

The model applies a weighting to estimate recession implications for the sector. The model aggregates the data and provides comparisons to adjacent Counties as well as to an index of Texas and the US.

(1) **Rank among Adjacent Counties.** Burleson County ranks # 2 of Adjacent Counties, trailing only Robertson County, in resistance to recessionary employment factors.

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- (2) **Index compared to Texas.** Burleson County scores 108.1 and ranks # 2 to all Adjacent Counties in an index using Texas at a score of 100 for a baseline.
- (3) **Index compared to US.** Burleson County scores 106.4 and ranks # 2 to all Adjacent Counties in an index using the United States at a score of 100 for a baseline.

### **GRAPHIC ANALYSIS**

All analysis is based on defined and published sources.

All graphics and PDF sets available on the web and upon request.

744 underlying Nielson Claritas reports available upon request.

29 PDF files with graphics, analysis and data available from our site, most professional sites and on request:

- (1) Narrative detail
- (2) Pictures
- (3) Highlights
- (4) Survey
- (5) Topographics & satellites
- (6) Plat, survey & sample site plan
- (7) Maps, driving distances & driving times
- (8) Weather

## **THE LAKE SOMERVILLE RETREAT IN BURLESON COUNTY, TX, USA**

- (9) Quality of life economic
- (10) Quality of life education
- (11) Quality of life marital status
- (12) Quality of life safety & security
- (13) Recession resistance studies
- (14) Density studies
- (15) Micro market\* demographic & econometric (D&E) summary table
- (16) Micro market\* D&E analysis
- (17) Micro market\* workplace & employment (WP&E) summary table
- (18) Micro market\* WP&E market fundamentals
- (19) Micro market\* WP&E employment by market segment
- (20) Micro market\* WP&E employment by geographic area
- (21) Macro market \*\* D&E analysis summary table
- (22) Macro market\*\* D&E analysis
- (23) Macro market \*\* WP&E analysis summary table
- (24) Macro market\*\* WP&E market fundamentals
- (25) Macro market\*\* WP&E employment by market segment
- (26) Macro market\*\* WP&E employment by geographic area
- (27) Downloadable PDF sets, available Claritas reports and web links
- (28) Single page flyer with HTML links
- (29) Multi page flyer with HTML links

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\* “Micro market” includes: 1-mile, 3-mile & 5-mile radiuses, City of Somerville, 77879 zip code & Burleson County.

\*\* “Macro market” includes the following adjacent Counties (with Texas & US benchmarks when available): Brazos, Burleson, Lee, Milam, Robertson and Washington. Although Brazos County is an urban County with a 20009 population of 163,386 representing 59.9% of the population of all Adjacent Counties, it was included in all Macro Market comparative analysis.

### **LINKS**

- (1) **Link to Lake Somerville State Park and Trailway site:**  
[http://www.tpwd.state.tx.us/spdest/findadest/parks/lake\\_somerville/](http://www.tpwd.state.tx.us/spdest/findadest/parks/lake_somerville/)
- (2) **Link to Lake Somerville Wildlife Management Area site:**  
[http://www.tpwd.state.tx.us/huntwild/hunt/wma/find\\_a\\_wma/list/?id=52](http://www.tpwd.state.tx.us/huntwild/hunt/wma/find_a_wma/list/?id=52)
- (3) **Professional listing:**
- (4) **Lands of America listing with full narrative:**  
<http://www.landsofamerica.com/listing/434294>
- (5) **Dedicated website:** <http://property.loopnet.com/16231213>
- (6) **Consumer listing:**  
<http://www.txls.com/detail.asp?PropID=53452>

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- (7) **LoopNet listing:** <http://listing.loopnet.com/16231213>
- (8) **Tax file:**  
<http://www.taxnetusa.com/texas/burleson/burlesondetail.php?theKey=19940>
- (9) **Multi-page PDF flyer with HTML:**
- (10) **Google map link from TX Highway 36 at FM 60 Road East to The Retreat:**  
[http://maps.google.com/maps?f=d&source=s\\_d&saddr=30.387092,-96.566048&daddr=St+Park+Rd+57&geocode=%3BFWCqzgEd\\_UI9-g&hl=en&mra=dme&mrcr=0&mrsp=0&sz=12&sll=30.342658,-96.650848&sspn=0.143999,0.307617&ie=UTF8&ll=30.351546,-96.621666&spn=0.143986,0.307617&t=h&z=12](http://maps.google.com/maps?f=d&source=s_d&saddr=30.387092,-96.566048&daddr=St+Park+Rd+57&geocode=%3BFWCqzgEd_UI9-g&hl=en&mra=dme&mrcr=0&mrsp=0&sz=12&sll=30.342658,-96.650848&sspn=0.143999,0.307617&ie=UTF8&ll=30.351546,-96.621666&spn=0.143986,0.307617&t=h&z=12)

If a link does not directly connect due to security settings on your computer or due to other opportunities, just copy and paste the link into your web browser.

Feel free to call or email us for technical assistance.



# **THE LAKE SOMERVILLE RETREAT IN BURLESON COUNTY, TX, USA**

## **TAXES**

2008 reported taxes are \$774.99. We increased 2008 by 25% to estimate 2009 property taxes on The Retreat at \$968.74. The Retreat currently has an Ag exemption.

Consult your tax advisor regarding your expected taxes.

## **DIRECTIONS**

From northbound on Texas Highway 36 at FM 60 Road (from Somerville, College Station, Houston, etc.), it is 10.1 mi. and about 17 min.

- (1) Head west (left) on FM 60 Road East for 7.1 mi.
- (2) Turn left (south) on State Park Road 57 for 3.1 mi.
- (3) The Retreat entrance is on your right with a CBC Southwest sign.

From southbound on Texas Highway 36 at FM 60 Road (from Caldwell, Austin, Waco, etc.), it is 9.5 mi. and about 15 min.

- (1) Head south (right) on FM 976 Road/Frenstat Road for 3.9 mi.
- (2) Turn left (southwest) at FM 60 Road East for 2.5 mi.
- (3) Turn right (south) on State Park Road 57 for 3.1 mi
- (4) The Retreat entrance is on your right with a CBC Southwest sign.

## **THE LAKE SOMERVILLE RETREAT IN BURLESON COUNTY, TX, USA**

From eastbound FM 1697 at County Road 124 (from Giddings, Austin, etc.), it is 11.4 mi. and about 21 min.

- (1) Head northeast (left) on County Road 124 for 1.5 mi.
- (2) Continue on County Road 132 for 3.9 miles.
- (3) Turn right (northeast) on County Road 130 for 4.2 miles.
- (4) Continue and turn left (southeast) on State Park Road 57 for 1.2 mi.
- (5) The Retreat entrance is on your right with a CBC Southwest sign.

## **DISCLOSURES & COPYRIGHTS**

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