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COASTAL REALTOR®

Newsletter

Official Publication of the Newport Beach Association of REALTORS®



COASTAL REALTOR®

Newsletter

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*Official Publication of the
Newport Beach Association
of REALTORS®*

401 Old Newport Blvd., Ste. 100
Newport Beach, CA 92663
(949) 722-2300

The purpose of the Newport Beach Association of REALTORS® is to be a service and support organization through active participation in establishing programs and services that will enhance and promote the successful business endeavors of its members. With integrity and competence, it will provide a positive link to the local community by cultivating goodwill and protecting the individual rights to own, transfer and use real property.

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or national origin in
connection with the sale of
rental of residential real
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or rental of housing, in the
financing of housing, and in
the provision of real estate
brokerage services.



PRESIDENT'S MESSAGE



**2025 NBAOR President
Natalie Shaw**

As we move into May, I want to share several important updates regarding CRMLS' response to NAR's new policy developments and upcoming advocacy efforts on behalf of our association.

CRMLS has recently issued an update in response to the new National Association of Realtors® (NAR) MLS policy called the Multiple Listing Options for Sellers, specifically the creation of Delayed Marketing Entry Listing (DMEL) status. CRMLS has stated that it will not be implementing DMEL, explaining that their existing rules already meet NAR's requirements.

In particular, CRMLS feels the new status will complicate the existing status options available to members and highlights that brokers currently have the ability to opt out of both IDX and syndication at the office level. They feel their status options maintain compliance with the national standards and already provide the consumer with several listing options to achieve their goals.

CRMLS also reaffirmed its continued opposition to private listings. Their position is rooted in a firm belief that private or "pocket" listings reduce market transparency and limit equal access to property information, ultimately harming consumers and the broader real estate community.

Should you have any questions, I encourage you to reach out to your broker for clarification.

In advocacy news, several members of our Board of Directors will be traveling to Sacramento at the beginning of May to participate in the California Association of Realtors® Legislative Day. This annual event provides an important opportunity to engage directly with state and local legislators and advocate for policies that protect homeownership and support the real estate profession.

There is an exciting Lunch & Learn scheduled for May 14th at 11:30am and I encourage you to attend, should your schedule permit. Chris Brigandi, Annie Clougherty, and Heather Kidder will be leading the discussion surrounding their experiences, insights, and advice on leadership, growth, and success in today's market. It will be a wonderful opportunity to learn from top agents in our profession and we are so grateful to them for agreeing to speak to our membership.

Thank you for your continued dedication and engagement. I wish you all a successful and wonderful month of May!

Best Wishes,

Natalie

WELCOME

New Members



MEMBER TRANSFERS

Nancy Arrache – from Douglas Elliman of California to IS Luxury of California

Carly Bryan – from Surterre Properties to Coldwell Banker Realty

Jon Curci – from Sail House Realty to Compass

Louis Digonzini – from Keller Williams Costa Mesa to eXp Realty of So. California

Jennifer Lobos – from Keller Williams Newport Beach to Keller Williams Realty Irvine

Michael Peters – from Keller Williams Newport Estates to Keller Williams Realty Irvine

Sabrina Salamone – from Seven Gables R.E. to Compass

Danielle Shaw – from Arbor Real Estate to Pacific Sotheby's Int'l

Scott Singer – from Arbor Real Estate to Pacific Sotheby's Int'l

Sophia Sun – from Arbor Real Estate to Coldwell Banker Realty

Bill Thompson – from Surterre Properties to Coldwell Banker Realty

Jacqueline Thompson – from Surterre Properties to Coldwell Banker Realty

Daniela Tunney – from Coldwell Banker Realty to Compass

Holly Wiemann – from Douglas Elliman of California to IS Luxury of California

DESIGNATED REALTOR® MEMBERSHIP

Leah Cowley - LPT Realty

Ben Griffen - IS Luxury of California

Kevin Kiser - Kiser Real Estate Capital

Emilia Pia Wolfe - Emilia Pia Wolfe, Broker

REALTOR® MEMBERSHIP

John Aguilera – Douglas Elliman of California

Carina Brana – Surterre Properties

Stefany Gonzaga – Pacific Sotheby's Int'l Realty

Michele Howroth – IS Luxury of California

Isaiah Kim – iPacific Capital

Roman Kozak – Douglas Elliman of California

Blake Lincoln – Coldwell Banker Realty

Brooke Matteson – Surterre Properties

Nasimeth Miles – Coldwell Banker Realty

Sebastian Miles – Coldwell Banker Realty

Daniel Willsie - Compass

AFFILIATE DESIGNEE

Parker R. Thompson- Stewart Title

Stephanie Dorr- Ticor Title

Vivan Chen- Exceed Lending

Milestone Anniversaries

40 Years!

Audrey Savopolos • Jim Jacobs

30 Years!

Richard Duggan

10 Years!

Karen Kesselman Obuljen • Paul Dolkas • Robert D. Cano • Steven Mastropaolo • Justin Grissinger • Lisa Stanton

5 Years!

Aniqa Saeed • Nick Gould • Diane Vara • Bronwyn Jones • Kyle Flagg • Nanci Terry

1 Year!

Alex Bikov • Hamid Rowshan • Whitney Kimball • Anthony Romeo • Patrick Hanna • Davieon Jackson • Frank Hurst • Jennifer Li • Scott Patton • Amy Long • Max Johnson

Congratulations!

NEW MEMBERSHIP CERTIFICATIONS & DESIGNATIONS

Susan Latini-Powell

Senior Real Estate Specialist®

The Seniors Real Estate Specialist® (SRES®) designation is for REALTORS® who want to be able to meet the special needs of maturing Americans when selling, buying, relocating, or refinancing residential or investment properties. By earning the SRES® designation, REALTORS® are prepared to approach mature clients with the best options and information for them to make life-changing decisions.

Allison Root

Senior Real Estate Specialist®

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Click the button below to learn more about getting your own Certifications or Designations!

CLICK HERE



Congratulations!

NEW MEMBERSHIP CERTIFICATIONS & DESIGNATIONS

Christina Durban

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Jennifer Norminton

Senior Real Estate Specialist®

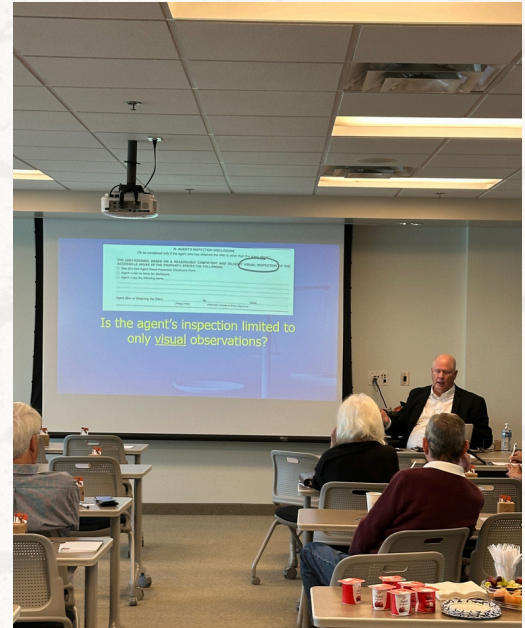
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Click the button below to learn more about getting your own Certifications or Designations!

CLICK HERE



Staying Out of Court



On April 10th, members gathered for an informative presentation led by litigation consultant Robert Brand. The session, "Staying Out of Court," focused on equipping REALTORS® with tools to navigate the legal pitfalls of disclosures and social media in today's dynamic market.

Brand covered key updates to the TDS/AVID disclosure process for 2025, offering practical advice for maintaining compliance and minimizing liability. Attendees also gained valuable insights into how risk management principles can be applied to everyday business decisions, and how to avoid common mistakes in social media that could lead to legal trouble.

The event offered actionable takeaways and sparked great discussion among attendees. Thank you to Robert Brand for sharing his expertise and helping our members stay informed and protected.



Honoring Our Local Heros

The 52nd Annual Newport Beach Police Appreciation Luncheon was a truly inspiring event, bringing the community together to recognize the dedication and service of the Newport Beach Police Department. Attendees heard powerful stories, celebrated award recipients, and expressed gratitude for the officers who work tirelessly to keep our city safe.

It was an honor to attend and to serve as a table sponsor for this meaningful celebration of our local law enforcement.



REMEMBERING



Chris Valli

It is with profound sadness that we share the passing of our esteemed colleague and friend, Chris Valli, who lost his brave battle with cancer early Friday, April 25th.

Chris was not only a beloved member of our community but also one of the most respected professionals in the real estate industry. His remarkable achievements, invaluable contributions, and enduring relationships have left a lasting legacy.

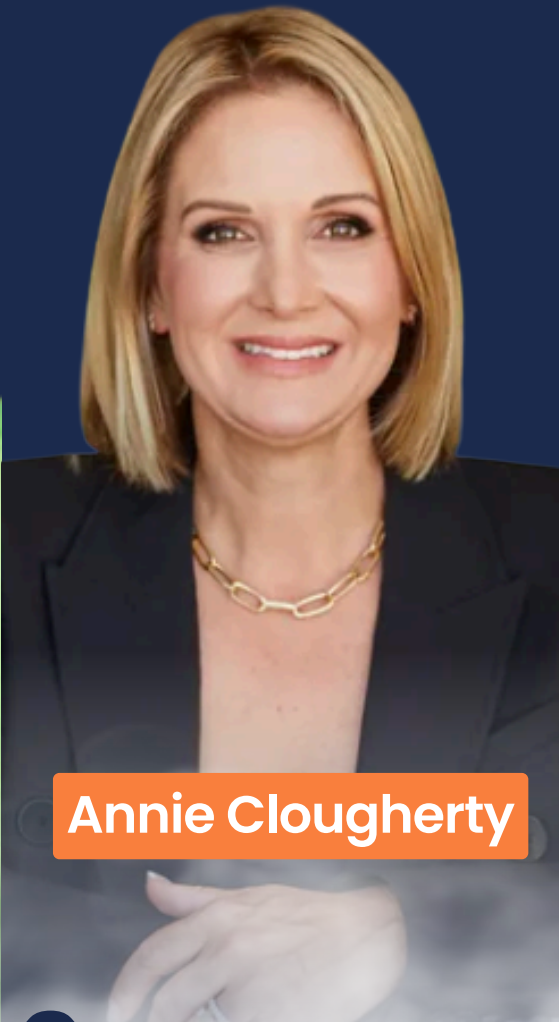
Over the course of his distinguished career, Chris partnered with top developers and builders, guiding land acquisitions, custom estate designs, and marketing strategies. He was honored with the Irvine Company's prestigious Broker of the Year Award for his work on the Shady Canyon development and achieved over \$1 billion in total sales transactions, including more than \$485 million in Shady Canyon alone.

Chris's impact on our industry – and on all who had the privilege of knowing him – will not be forgotten. Our thoughts are with his wife, Sharon, his son, Craig, and all of his family and friends during this difficult time.

Let us honor Chris's memory by continuing the work he loved so much. We will keep you informed about service arrangements as they become available.



Chris Brigandi



Annie Clougherty



Heather Kidder

LUNCH & LEARN: TEAM LEAD PANEL



401 Old Newport Blvd., Ste 100

Wednesday, May 14th

11:30 AM

Sponsored By:

**WELLS
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Home Mortgage



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Coastal Cities REMiNDER

REMiNDER FOR LISTING SIGNAGE

Please be mindful when placing signs at your listings. Avoid using excessive signage, as it can violate local city ordinances.



CITY OF COSTA MESA SIGN CODE

Before installing any signs, be sure to check with the city to confirm what is permitted in that area. Compliance helps protect you and your clients from potential fines or removal notices.

Let's continue to uphold a professional standard while staying within regulations.



CITY OF NEWPORT BEACH SIGN CODE

AFFILIATE OF THE MONTH

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Vivian Aims To Share These Programs With Realtors And Borrowers

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Architect/Builder

NEWPORT RESOURCE MGMT.	RUSH HILL	RUSH@NRMSERVICES.COM	949-939-2570
JULIE LAUGHTON DESIGN BUILD & JLGC	JULIE LAUGHTON	JULIE@JULIELAUGHTON.COM	(714) 305-2861

Escrow

CHARTWELL ESCROW	DIANE ANTHONY	DANTHONY@CHARTWELLESERVICES.COM	949-354-1892
ESCROW TECHNOLOGIES	NATALIE WYTRZYMALSKI	NATALIE@ESCROWTECH.NET	847-651-1974
FREEDOM ESCROW	JEFF TAYLOR	JEFF@FREEDOMESCROW.COM	714-655-7816
GENERATIONS ESCROW	BRANDI RIVERA	BRIVERA@GENESCROW.COM	714-746-3024
GRANITE ESCROW	DEE ANNA POPE	DPOPE@GRANITEESCROW.COM	949-720-0110
MARINERS ESCROW	FA KARAMZADEH	FA@MARINERSESCROW.COM	949-412-4650
PROMINENT ESCROW	DEVON COHEN	DCOHEN@PROMINENTESCROW.COM	949-870-7200
PROMINENT ESCROW	JIM MECKLENBURG	JIM@PROMINENTESCROW.COM	949-375-4674

Health Benefits

BENEFITS STORE, INC.	ROGER SMITH	AFFILIATE@BENEFITSSTORE.COM	925-855-9500
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Home Warranty

FIDELITY HOME WARRANTY	ROBYN PRICE	ROBYN.PRICE@FNF.COM	714-726-9171
FIDELITY HOME WARRANTY	MIA BEATIFICATO	MIA.BEATIFICATO@FNF.COM	714-497-5837
FIRST AMERICAN HOME BUYERS PROTECTION	ROSIE POOLE	RPOOLE@FIRSTAM.COM	949-400-7789

Legal

LAGUNA LEGAL MEDIATION SERVICE & DOC.	ELLIE ORTIZ	ELLIE@LAGUNALEGALHELP.COM	949-497-9800
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Misc.

GOLDEN WEST MOVING	CHAD SCOTT	CHAD@GOLDENWESTMOVING.COM	714-213-1581
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Mortgage/Lending.....

BMO LENDING	ERRIN REEDER	EKELLYR@GMAIL.COM	626-664-7437
CITIBANK	NICHOLAS PETRONIS	NICK.PETRONIS@CITI.COM	949-374-3744
MONARCH COAST FINANCIAL	KEVIN BUDDE	KBUDDE@MONARCHCOASTFINANCIAL.COM	949-422-2075
MUTUAL OF OMAHA MORTGAGE	SEAN SKAGGS	SEAN.SKAGGS@MUTUALMORTGAGE.COM	714-875-7979
REVERSE MORTGAGE EDUCATORS	RYAN KLEIS	RYAN@REVERSEMORTGAGEEDUCATORS.COM	714-609-0196
UNITED AMERICAN MORTGAGE CORP.	MARK SIMON	MARK@MARKFORMORTGAGE.NET	949-246-5880
WELLS FARGO HOME MORTGAGE	MORAD RAHEB	MORAD.RAHEB@WELLSFARGO.COM	310-467-4411
WELLS FARGO HOME MORTGAGE	MATTHEW DIDIER	MATTHEW.DIDIER@WELLSFARGO.COM	949-371-9718
AMERICA'S CHOICE LENDING GROUP	THOMAS LIEB III	TOM@AMERICASCHOICELG.COM	626-487-0008
EXCEED LENDING	VIVIAN CHEN	VIVIANCHEN@EXCEEDLENDING.COM	626-271-5950

Natural Hazards.....

FIRST AMERICAN NATURAL HAZARD DISC.	CANDY BABCOCK	CBABCOCK@FIRSTAM.COM	714-309-6447
MY NHD	ROBERTA CURLENDER	ROBERTA@MYNHD.COM	949-322-5220
MY NHD	LINA KING	LINA@MYNHD.COM	949-945-3526

Photography.....

PREVIEWFIRST	PAOLO BIANCALANI	PAOLO@PREVIEWFIRST.COM	949-527-1702
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Staging and Design.....

PACIFIC STAGING	CASSIDY WILLINGHAM	CASSIDY@PACIFICSTAGING.NET	949-200-7745
STUDIO 33 DESIGN CONCEPT/HOME IMPROVEMENT	MONICA GIOELI	MONICA@GIOELI.CO	949-378-3303

Title....

CHICAGO TITLE	PETER NOURSE	PETER.NOURSE@CTT.COM	949-463-3999
FIRST AMERICAN TITLE INSURANCE	GEORGE SINES	GSINES@FIRSTAM.COM	714-250-4951
FIRST INTEGRITY TITLE COMPANY	CARTER GASKILL	CARTER.GASKILL@FIRSTINTEGRITYTITLE.COM	(949) 923-7584
LAWYERS TITLE	MARTHA GEWERTZ	MGEWERTZ@LTIC.COM	949-500-5884
ORANGE COAST TITLE	SHELLEY ALLARD	SALLARD@OCTITLE.COM	714-553-7377
PACIFIC COAST TITLE COMPANY	CHRISTY COFFEY	CCOFFEY@PCT.COM	949-887-0338
STEWART TITLE	BRYON BASHORE	BRYON.BASHORE@STEWART.COM	714-975-1773
STEWART TITLE	DEREK GRAHAM	DEREK.GRAHAM@STEWART.COM	949-584-2570
STEWART TITLE	PARKER THOMPSON	PARKER.THOMPSON@STEWART.COM	949-350-7649
TICOR TITLE	STACEY ANGSTEAD	STACEY.ANGSTEAD@TICORTITLE.COM	760-214-3211
TICOR TITLE	CORTNEY KELLER	CKELLER@HWAHOMEWARRANTY.COM	714-707-0149
TICOR TITLE	NICOLE LEGRAND	NICOLE.LEGRAND@TICORTITLE.COM	939-933-7009
USA NATIONAL TITLE	LISA RUNYON	LRUNYON@USA-NTC.COM	949-933-0693
WFG TITLE	HOPE CARR	HOPE@WFGTITLE.COM	949-400-7642
WFG TITLE	ROBERT TOFFEL	ROBERT.TOFFEL@YAHOO.COM	949-702-3027

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Moulding
Murals
Stain



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Market Yourself (and Your Properties) Like a Pro

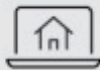
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TEAM TACTICS: KEEPING A COOL HEAD FOR CONFLICT RESOLUTION

By Devin Meenan

DIRECTNESS, EMPATHY AND PATIENCE ARE ALL QUALITIES AN AGENT NEEDS WHEN NEGOTIATING FOR THEIR CLIENTS—AND FOR THEMSELVES.

Ongoing lawsuits leave the real estate industry facing an uncertain future, with real estate professionals unsure which business practices will remain in place. Disputes on your team shouldn't have to go as far as a courtroom, but conflict resolution is a vital skill as an agent. Being part of a team gives you a chance to put those skills to the test.

Negotiating with (and for) your clients is a crucial part of your job. There's no reason you shouldn't be able to negotiate on your own behalf, too. Seeing how conflicts are managed among team members also allows you to judge whether the team is the right fit for you. It's the same way any buyer will want to attend an open house (or at the very least see photos) before they consider living in a home.

The National Association of REALTORS®, in its conflict mediation guidelines, recommends being as upfront as you can while being an active listener, qualities that will allow for an open dialogue and—hopefully—a mutually beneficial resolution.

Know what you want

It's generally a good idea to head into a negotiation with hard and soft wants—what you're willing to move on, and what you won't. That means taking stock of what is most important to you and ranking from there.

But remember that the soft wants are still things you do want. Be willing to sacrifice them, but not eager. Don't immediately accept the easiest deal just in the spirit of resolution. Compromise will have to occur, but that doesn't mean your opening offer should be a compromise.

Think of yourself as your own client here. How would a buyer client feel if they found out you didn't get them the best deal possible? Keep that reaction in mind as you negotiate for yourself.

Listen to the other side of the table

Speaking of compromise, the flip side of being firm in your needs and/or desires is to recognize that the other party feels the same way about what they want or need.



TEAM TACTICS: KEEPING A COOL HEAD FOR CONFLICT RESOLUTION

By Devin Meenan

If you approach a conversation as a battle to be won, neither you nor your negotiating partner (not “opponent”) will walk away feeling victorious. Not speaking can be the most important part of the conversation, provided you understand the push and pull of silence—say nothing and the other person won’t understand what you want, and you’ll probably get little of it.

In the spirit of directness, you can ask the teammate across from you exactly what they want to walk away from the table with. Then, share what you want, and the journey to reaching the acceptable space between those two points can begin.

Talk directly, and in person

Real estate coach Sherri Johnson recommends that, during conflicts, teammates should avoid email or text conversations.

Text conversations are much easier to blow up than face-to-face ones. You only have the words to go off of, not tone, expression, etc. A poorly worded response can spark anger or annoyance, which leads to frustration or resentment. Those feelings will spark the exact sort of “going into battle” mindset you should avoid for an in-person conversation.

Similarly, another part of being a direct communicator is to have the conversation with your teammate ASAP. Don’t put it off and let the conflict hover in the air between the two of you. Address it in a timely manner so you can function like the team you’re supposed to be.

Recognize seniority, but not blindly

You don’t have to utterly defer to seniority; assuming you have to put your needs behind others’ on the team is a good way to wind up feeling dissatisfied. Doing so may bury one inter-team conflict, but it’s going to create another, where you might feel you aren’t being heard by your teammates.

But it’s also important to have situational awareness. For instance, you probably wouldn’t conflict resolve with your team leader the same way you would with, say, a fellow new agent.

When walking the line between assertiveness and being deferential, it’s important to have situational awareness. Has the person you have an issue with been in the industry or part of the team longer? Then it might be a good idea to listen and learn from them, so as to nip the conflict in the bud and readjust your thinking for the better.

If you’re the more experienced agent, look at it the other way around. One obvious reason that a new agent would join a team is because they’re seeking a mentor. If you’ve got a conflict with the new agent on your team, approach the dialogue calmly, and gauge whether you could be the mentor they’re searching for.





Home Mortgage



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Monthly Market Report

Orange County

March 2025

Existing SFR
Home Sales

1,020

% Change
from Last Year

+5.7%

Existing SFR
Median Price

\$1.45M

% Change
from Last Year

+3.6%

Active Listings

2,138

% Change from
Last Year

+82.3%

Market
Competition

Median Days
on Market

21

Sales-to-List
Price %

100.0%

% of Active
Listings with
Reduced Prices

30.6%



CALIFORNIA
ASSOCIATION
OF REALTORS®



Monthly Market Report

Newport Beach, California

March 2025

Existing SFR
Home Sales

63

% Change
from Last Year

+12.5%

Existing SFR
Median Price

\$5.50M

% Change
from Last Year
+19.8%

Active Listings

230

% Change from
Last Year

+29.9%

Market
Competition

Median Days
on Market

22

Sales-to-List
Price %

98.0%

% of Active
Listings with
Reduced Prices

28.7%



CALIFORNIA
ASSOCIATION
OF REALTORS®



Monthly Market Report

Costa Mesa, California

March 2025

Existing SFR
Home Sales

42

% Change
from Last Year

+27.3%

Existing SFR
Median Price

\$1.69M

% Change
from Last Year

+8.5%

Active Listings

63

% Change from
Last Year

+162.5%

Market
Competition

Median Days
on Market

22

Sales-to-List
Price %

100.0%

% of Active
Listings with
Reduced Prices

34.9%



CALIFORNIA
ASSOCIATION
OF REALTORS®





CUSTOM HOMES AND REMODELING



A tremendous asset to the Real Estate Industry, Julie Laughton, CEO of Julie Laughton Design Build and JLGC, provides an exclusive, one-on-one, 5-star service. A realtor's dream for their clients, Julie Laughton is the only person, the only phone call, they will have to make to remodel or build their custom home ground up.

With over 30 years of experience, Julie Laughton custom designs all her projects as a one-stop shop, working with her team of seven engineers and her construction company. In addition, she handles all landscapes and exterior features as the general contractor. Transforming people's living environments into their dream homes, Julie Laughton remains the largest, female-owned, custom design builder in America, living proof a woman can succeed in the male-dominated world of construction.

Julie Laughton would like to meet with you and discuss how best we might collaborate on future projects. Please phone Denise Gary-Pandol at 661 747 1829 to schedule a meeting.



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DESIGN BUILD



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CITY OF NEWPORT BEACH NEWS

Newport Beach Dedicates City's First Universally Accessible Playground

City officials and community members gathered at San Miguel Park on Wednesday, April 23 to celebrate the grand opening of Newport Beach's first universally accessible playground, with ADA features designed for children of all abilities.

The upgraded and refurbished San Miguel Park playground now includes more than 20 accessible, ground-level play features, elevated components reachable by transfer platforms, ADA-compliant pathways, and upgraded parking. R.E. Schultz Construction recently completed the work under a contract awarded in October 2024.

"This is much more than a new playground — it's a symbol of how a single voice can spark meaningful change," said Mayor Joe Stapleton during a ribbon-cutting ceremony. "In 2019, a young resident named Alexis Portillo asked the City to install an ADA swing so her sister could enjoy the park. That thoughtful request led to something even greater: Newport Beach's first universally accessible playground, right here in San Miguel Park."

The project cost of about \$900,000 was paid through federal Community Development Block Grant allocations and City funds.

"Today's grand opening is a celebration of community collaboration, vision, and the guiding principle that every child deserves a place to play," said Sean Levin, Director of Recreation and Senior Services. "We are proud to open this space and set a new standard for inclusive play."

San Miguel Park is located at 2200 San Miguel Drive. The playground is now open to the public.



CITY OF COSTA MESA NEWS

The City is accepting written comments on the proposed Consolidated Plan for future housing during the public review period (April 18, 2025 through May 20, 2025) and also at the public hearing on Tuesday, May 20, 2025.

The Consolidated Plan includes a strategic plan for addressing housing and community development needs of the City, which are intended to guide the City's use of CDBG and HOME funds over a five-year period. The Consolidated Plan and Annual Action Plans are required for the City to continue receiving these federal funds.

The City began its consolidated planning process in September 2024 by soliciting feedback from residents at the Senior Center Knowledge and Health Fair Expo, holding two community meetings, one stakeholder meeting, and launching a survey to learn how residents would like to spend future grant funds for housing and community development.

The draft plan will help determine the use of U.S. Housing and Urban Development (HUD) Community Development Block Grant (CDBG) and HOME Investment Partnerships Act (HOME) funds based on the required needs assessment and market analysis and feedback received through the public participation process.

For more information, [please visit our website here.](#)





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CLOSED FOR MEMORIAL DAY

**OUR OFFICE WILL BE
CLOSED ON
MONDAY, MAY 26TH
AS WE HONOR THOSE
WHO GAVE THEIR
LIVES IN SERVICE.**

WE'LL REOPEN TUESDAY, MAY 27TH

Annual Business Report

OCAR Annual Business Report				Newport Beach Association of Realtors			
dba Newport Beach Association of Realtors							
Balance Sheet December 31, 2024							
	MLS	Association/ Building	Total		MLS	Association/ Building	Total
Assets				Liabilities			
Cash	\$ 64,898	\$ 770,177	\$ 835,075	Current Liabilities			
Accounts Receivable	\$ -	\$ 54,257	\$ 54,257	Accounts Payable	\$ 43,999	\$ 117,058	\$ 161,057
Inventory	\$ 738	\$ 7,699	\$ 8,436	CAR/NAR Payable	\$ -	\$ 39,910	\$ 39,910
Prepaid Expenses & Deposits	\$ 50,828	\$ 151,562	\$ 202,391	Deferred Revenue	\$ 400,853	\$ 152,011	\$ 552,864
				Other Current Liabilities	\$ 440	\$ 63,718	\$ 64,159
Total Current Assets	\$ 116,464	\$ 983,695	\$ 1,100,159	Long Term Liabilities	\$ -	\$ 1,024,081	\$ 1,024,081
Net Fixed Assets	\$ -	\$ 2,801,492	\$ 2,801,492	Total Liabilities	\$ 445,293	\$ 1,396,778	\$ 1,842,070
Investments	\$ -	\$ 1,000	\$ 1,000	Equity			
Intercompany	\$ 672,431	\$ (672,431)	\$ -	Equity Balance	\$ 251,174	\$ 1,802,016	\$ 2,053,189
Total Assets	\$ 788,895	\$ 3,113,756	\$ 3,902,650	Net Revenue over Expenditure	\$ 92,428	\$ (85,038)	\$ 7,391
				Total Equity	\$ 343,602	\$ 1,716,978	\$ 2,060,580
				Total Liabilities & Equity	\$ 788,895	\$ 3,113,756	\$ 3,902,650

THE PLAYBOOK: Answering the Top FAQs From New Agents

By Claudia Larsen



Here are some of the questions often asked by new agents, and how a few leaders in the industry are answering them.

Real estate can be quantified as a confusing industry, especially for those trying to understand it from the outside. For new agents trying to broach the field, no matter how much education they may have garnered before jumping into the business, it can be a challenge to get a handle on the job until you have some years of experience under your belt.

Something this industry does phenomenally well, however, is mentoring new agents who are just starting out. There is a distinct pipeline for new agents to reach and connect with veteran agents in order to ask questions and receive guidance. Veteran agents, especially those who have moved into leadership positions, are nothing short of eager to assist.

Veteran agents and leaders like Jabin Norris, founder/owner of PROACTIVE Real Estate; Jason Posnick, sales manager at Lamacchia Realty; and Katey McGrath, vice president and director of Operations at Elfant Wissahickon REALTORS®, have mentored many of the industry's new generation of agents, and have heard a lot of the same questions over and over.

For agents new and old, let's take a look at some of their most frequently asked questions, and how a veteran agent/leader would answer them.



How do I jumpstart my career?

The most common question of all, one which Norris has received the most, is how a new agent can jumpstart their career.

Norris says there are many paths for new agents to reach their goals, but there are some key factors that lay the foundations of success.

“Though you are getting into the business to help the public achieve the American Dream of homeownership, what you must realize now is that you are entering the world of self employment,” he says. “From day one, you must focus on building self accountability, time management skills and building your brand.”

Norris has a few bullet points he shares with agents to help them get off the ground and begin to rise to success in real estate, centering on accountability, technology, scheduling, scripts, being hyperlocal and performing community service.

He explains that first and foremost, as a new agent you must “hold yourself accountable to your goals and focus one day at a time to the finish line.”

Norris also stresses that agents must embrace real estate’s “technological ecosystem” in order to maximize their

productivity through tools such as an automated transaction flow and a digital calendar. New agents also need to implement a daily schedule in order to prioritize working during “peak brain performance” hours, and use custom scripts to “keep presentation consistent and compound every opportunity.”

Community service and being hyperlocal go hand in hand, as Norris puts it. To become a successful agent, you need to “focus on a hyperlocal business model that keeps your business centric within your community,” and always make sure to give back to that community.

“If you can adapt to this mindset, the success is in the numbers, and you will achieve the path you desire within the most efficient timeline,” he says.

How can I retain business?

New agents also ask Posnick about jumpstarting their careers, with the added caveat of how to retain business. What he tells every agent is that “the single greatest indicator of your success early on is going to be your environment.”

He points to the four levels of learning: unconscious incompetence, conscious incompetence, conscious competence and unconscious competence.

According to Posnick, new agents (and really anyone moving into a new career) start at the level of unconscious incompetence, “where you don’t know what you don’t know.”

To get out of this level, he says you have to “get into an environment around people doing it (meaning what you want to do) so you can see what they’re doing and figure out where you think you need to start.”

This then pushes toward conscious incompetence, where you now understand what you don’t know and what you have to learn, says Posnick, and that “it’s just a matter of asking the right questions.”

Next you move into conscious competence, where you now know what to do, but you haven’t become a master, so to speak. All you have to do, explains Posnick, is repeat the job over and over, “sharpening the axe to the point that you become unconsciously competent (aka the last level) and can do it amazingly in your sleep.”

“For new agents, whether it’s transactional knowledge, lead gen knowledge, lead conversion knowledge, marketing knowledge, whatever you want to learn about, figure out where you’re at in the four phases of learning,” he says. “Then it’s either environment, questions, repetition or you’re already doing it.”

If you had to start over, what would you do differently?

McGrath says that most agents who reach out to her for guidance ask her what she would do differently if she had to start her career over while knowing everything she knows now.

According to McGrath, one of the base tenets is to “make the most of your database and your calendar from day one.”

“Track everything and everyone, and stay in touch,” she says. “Don’t be hesitant to reach out to clients after settlement, and if you haven’t already, it’s not too late.”



SOLO(k) SOLUTION



Newport Beach Association of Realtors RETIREMENT PLANEXCHANGE[®]

The Fiduciary-Plus Retirement Plan Exchange Solo(k) Solution is a retirement plan solution for business owners and their spouses who are receiving compensation from the business. The Solo(k) Solution allows you to maximize your annual pretax and after-tax retirement contributions while reducing your administrative burden, transferring certain risks, and potentially reducing costs. We understand that sponsoring and maintaining a retirement plan, particularly for small businesses, can be challenging. This program brings together a team of professionals so you can focus on running your business — not your retirement plan.



Contributions:

- Contributions may be made monthly, quarterly, semiannually, or annually
- Contributions may only be for business owner and spouse, if receiving compensation
- 2023 maximum contributions
 - Deferrals: \$22,500
 - Additional catch-up (if age 50 and older): \$7,500
 - Discretionary profit share: \$43,500¹
- Minimum \$6,000 annual contribution



Service Providers:

- Third Party Administrator: TAG Resources
- 3(16) Plan Administrator Fiduciary: TAG Resources
- 402(a) Signatory Named Fiduciary: TAG Resources
- 3(38) Investment Manager Fiduciary: Fiduciary-Plus
- Recordkeeper: Transamerica



Fees:

ALL IN*: 0.65% (does not include financial advisor compensation)

PLAN SERVICE FEES: ACH fee: \$5 per ACH draft or no cost if deferrals are uploaded from payroll provider

ANNUAL FEE PER PARTICIPANT: \$25

ADDITIONAL PARTICIPANT FEES (IF APPLICABLE):

- Distribution: \$100
- Loans
 - Initial setup: \$100
 - Annual: \$100
- Hardship fee: \$100

To speak with
Wealth Management Strategies
Erica Sylvia or Marc DiDomenico
Call: 949-833-5846

*Asset-based fee includes TAG and Transamerica fees as well as the 3(38) Investment Manager compensation.
Actual fees based on individual participant fund allocation. Asset fee does not include the flexible Financial Advisor compensation.

¹ Maximum profit share is contingent upon income.



NEWPORT BEACH
ASSOCIATION OF REALTORS[®]



INVESTMENT STRUCTURE - FIDUCIARY-PLUS

TARGET DATE FUNDS/ASSET ALLOCATION FUNDS	
TARGET DATE FUNDS (QDIA) State Street Target Retirement Income Ret Acct State Street Target Retirement 2020 Ret Acct State Street Target Retirement 2025 Ret Acct State Street Target Retirement 2030 Ret Acct State Street Target Retirement 2035 Ret Acct State Street Target Retirement 2040 Ret Acct State Street Target Retirement 2045 Ret Acct State Street Target Retirement 2050 Ret Acct State Street Target Retirement 2055 Ret Acct State Street Target Retirement 2060 Ret Acct State Street Target Retirement 2065 Ret Acct	ASSET ALLOCATION FUNDS TA Vanguard LifeStrategy Income Ret Acct TA Vanguard LifeStrategy Conservative Growth Ret Acct TA Vanguard LifeStrategy Moderate Growth Ret Acct TA Vanguard LifeStrategy Growth Ret Acct
PASSIVE CORE OPTIONS	
INTERMEDIATE-TERM BOND Fidelity U.S. Bond Index Ret Acct LARGE CAP BLEND Fidelity 500 Index Ret Acct MID CAP BLEND Fidelity Mid Cap Index Ret Acct	SMALL CAP BLEND Fidelity Small Cap Index Ret Acct WORLD/FOREIGN STOCK Fidelity Total International Index Ret Acct
ACTIVE CORE OPTIONS	
CASH EQUIVALENT Transamerica Stable Value Advantage INTERMEDIATE-TERM BOND Metropolitan West Total Return Bond Ret Acct PIMCO Income Ret Acct LARGE CAP VALUE BlackRock Equity Dividend Ret Acct LARGE CAP GROWTH JPMorgan Large Cap Growth Ret Acct SMALL CAP VALUE DFA U.S. Targeted Value Portfolio Ret Acct	SMALL CAP GROWTH Janus Henderson Triton Ret Acct REAL ESTATE DFA Global Real Estate Securities Ret Acct WORLD/FOREIGN STOCK MFS International Diversification Ret Acct

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May

CALENDAR OF EVENTS

2025

Sun

Mon

Tue

Wed

Thu

Fri

Sat

1

2

3

4

5

Affiliates
Meeting
1:00pm

6

7

Growing Green:
Environmental
Awareness and
Your Real Estate
Practice

8

9

45 Hour License
Renewal Course
9:00am

10

11

12

13

14

Supra eKey
Training
8:00am
Lunch & Learn
11:30am

15

16

17

18

19

Mastering Real
Estate
Representation

20

21

Real Estate
Kickstarter

22

23

45 Hour License
Renewal Course
9:00am

24

25

26

Memorial
Day
Office Closed

27

28

CRMLS Matrix
LIVE Training

29

30

31

Join us for committee meetings, educational offerings, and great community and charity events!

THURSDAY 11:00 am - 2:00 pm Broker Open House, areas 9, 11, 12, 25-27

FRIDAY 11:00 am - 2:00 pm Broker Open House, areas 1-8, 10, 14-17