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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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Janelle Genovese

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Federal law prohibits discrimination based on race, color, religion, sex, handicap, familial status or national origin in connection with the sale of rental of residential real estate, in advertising the sale or rental of housing, in the financing of housing, and in the provision of real estate brokerage services.



PRESIDENT'S MESSAGE



**2025 NBAOR President
John Yasko**

Dear Members,

First, I want to acknowledge and thank Natalie Shaw for her service on the NBAOR Board of Directors and most recently as President. Her leadership and commitment have left a lasting impact on our Association, and we wish her every success going forward.

I am honored to address you for the first time as President of the Newport Beach Association of REALTORS®.

I step into this prestigious role with gratitude and determination to build on our strong foundation. I became a member of this Association in January 2010, when I began my residential real estate career with the Tim Smith Real Estate Group at Coldwell Banker Realty. However, it wasn't

until a few years ago, when I became involved on the Board, that I truly understood the work the Board does and how much they do. I have experienced firsthand how our Association empowers our REALTORS® and strengthens our community.

Over the last four years, I have served as a Board Director, completed two terms as Treasurer, chaired various committees and task forces, traveled as a State Director to California Association of REALTORS® meetings statewide, representing our Association and Region 32. I was humbled to be recognized by the members with the 2023 Newport Beach REALTOR® of the Year award, particularly after learning that the history of the trophy dates back to 1956! Most recently, I have spent the first seven months of 2025 serving as Vice-President, preparing for this moment.

Serving in these roles compelled me to become involved in areas I previously might not have. For example, as treasurer, I reviewed our income, expenses, balance sheet every month, skills I gained while earning a B.S. in Finance from USC, and had not used since my career as an executive at Enterprise Mobility (Enterprise, Alamo, National Rent-A-Car brands). I will admit, I did not fully understand the value the Association provides to its members or the depth of what the Board does, until I got involved in 2021, 11 years after becoming a member. This sentiment was echoed at our recent bi-monthly Board meeting when another Director, and long-time local practitioner said they too hadn't realized how much work and value NBAOR provides its members, until they participated as a board member. There is so much that goes on behind the scenes and all for the benefit of you, the members, and your success as REALTOR®!

PRESIDENT'S MESSAGE CONTINUED

Now, why did I get involved? Maybe a mid-career or mid-life crisis? Maybe an internal need to give back? Maybe just one of those things that casually land in your lap? In 2021, another REALTOR® member contacted me and asked if I had considered running for a position on the Board of Directors. I had not. I was reminded that I had built a successful career in real estate locally, and I was a bit inspired to give back to our industry and community. After all, we are in a career which allows us to serve others. I contemplated the idea but what got me over the hump, were my three children as they were becoming young adults, as I observed them building careers rooted in service to the public, and I felt this opportunity aligned with our core family values.

My children, Drew, Kate, and Carly, had jobs as ocean lifeguards while in high school at the City of Huntington Beach. The product of our Newport Beach junior lifeguard program, they are some of the few participants that move on to become the real ocean lifeguards. They were straight-A students while at Newport Harbor High School and in college, and each also Division 1 athletes...the list goes on. Yes, I am a proud dad. Drew earned a degree in mechanical engineering but upon graduation chose to pursue a career as a firefighter-paramedic, and began his journey during the pandemic in March of 2020. Kate, after earning dual degrees in 2020, returned to lifeguarding at HB, is a licensed paramedic, then became a Marine Safety Officer (that is the job title of a full-time, career lifeguard) at City of Laguna Beach Lifeguards. She now works part-time at the CHOC ER while earning another degree in nursing. She has since married a paramedic-firefighter (also a former co-worker and former Lifeguard III at HB). Carly, a valedictorian at NHHS in 2020, was at Columbia University in NYC at the time I made this decision, where she was also a student-athlete like her siblings, as a member of the women's swim team. This spring she completed her undergraduate degree, has returned to HB as a Lifeguard III this year, before pursuing a graduate degree and also pursuing a career that will help others.

People often comment on how admirable it is that I've raised my children to serve the public. My wife works in special education as an in-class aide at NMUSD. Seeing their dedication inspired me to step up and do more than, helping families sell, buy and invest in homes. Enter the opportunity to serve you—the members of the Newport Beach Association of REALTORS®.

If you are still following along, thank you and bear with me, I'm almost done. So why is this so important? Here is a quick history lesson. Our Association has a proud history dating back to

PRESIDENT'S MESSAGE CONTINUED

1929, when 41 real estate brokers in the area came together to form the “Newport Harbor Realty Board.” (You can read more about the history on our website.) They met at the Mesa Tavern (I don’t know if this is the same Mesa Tavern in Costa Mesa today), elected Lew Wallace as their first President, and began building an organization dedicated to raising standards, advocating for property rights, and supporting one another.

From early efforts to lobby for Newport Harbor improvements in the 1930s, to promoting zoning, fighting harmful legislation, and even influencing the development of UC Irvine, our members have always been more than just real estate professionals—we have been community builders and advocates. Today, we keep those same values alive and are doing the same things and more. Over the decades, the Association has evolved through name changes, expanded its reach, and adapted to an ever-changing market. But our mission has remained steadfast: to unite REALTORS®, uphold high ethical standards, and protect the dream of homeownership.

Today, as in 1929, we remain an Association driven by members, for members. That is why your involvement is critical to our future.

As President, my first order of business is to ask you to get involved—or become more involved.

How? Start small. Attend an event, maybe an annual event such as the Fashion Show (October), or play in the Pickleball Tournament (July), join a C.A.R. legislative update when they are scheduled, or come to the once a year, Annual Member Meeting or the NBAOR Installation Breakfast in December. Get involved with YPN or attend one of their many educational Lunch-n-Learns they organize. Take advantage of training courses at the Board or online. Support those affiliates that support our organization. Did you know you can even open a 401(k) through a program offered by the Newport Beach Association of REALTORS®?

There are so many benefits for you beyond that of networking and having a board that roots for and supports you.

My call for involvement reminds me of former Newport Beach Mayor Will O’Neill, who during his second term as Mayor spoke at one of our installation breakfasts and said he was not

PRESIDENT'S MESSAGE CONTINUED

only looking to find, but also to recognize “the helpers.” I saw he was quoted in Stu News around that time, “When I was a boy and I would see scary things in the news, my mother would say to me, ‘Look for the helpers. You will always find people who are helping.’” Be a helper. Get involved. Let’s grow our membership and strengthen each other and our community, together!

Just as those 41 brokers did in 1929, we must continue to unite, adapt, and lead. There is room for YOU to help shape the future of this Association. I encourage you to attend our events, serve on a committee, tap your peer on the shoulder that is a member of another association to join ours (our membership is less expensive than OCR, Laguna and PWR), nominate a fellow member to run for the Board, and share your voice—your participation keeps our legacy alive.

Thank you for your trust and support. I look forward to leading NBAOR with integrity, energy, and a commitment to both our history and our future. Together, we will make the remainder of 2025 a year of growth, advocacy, and success.

With gratitude and enthusiasm,

John



Congratulations

TO THE NEWLY ELECTED 2026 DIRECTORS



Officers:

President – John Yasko, Coldwell Banker Realty

Vice President – Reuben Gulledge, Compass

Secretary – Chris Maddy, Pacific Sotheby's Int'l Realty

Treasurer – Kevin Kubiak, Arbor Real Estate

Directors:

Rebecca Anderson, Surterre Properties

Todd Bousman, bouHAUS Properties

Dylan Mason, Compass

Krista McIntosh, Coldwell Banker Realty

Rob Norquist, Compass

Scott Singer, Pacific Sotheby's Int'l Realty

Cari Young, Compass



WELCOME

*New
Members*

MEMBER TRANSFERS

Steven Lavallee – from eXp Realty of California to eXp Realty of So. California

Jill McClain – from Home Bound to Douglas Elliman of California

Shala Nowroozi – from Surterre Properties to Berkshire Hathaway HomeServices

Mark Stanga – from Marterra to Compass

Jing Sun – from Keller Williams to Real Brokerage Technologies

DESIGNATED REALTOR® MEMBERSHIP

Peter Dursi

ROA California Inc.

REALTOR® MEMBERSHIP

Charlie Durante – Compass

Natalie Mauriello – Coastal Pacific Real Estate

Svetlana Martin – Compass

Alexis Palacio – Coldwell Banker Realty

Ian Toder – Compass

Valli, Craig – Surterre Properties

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Charlie Durante – Compass

Natalie Mauriello – Coastal Pacific Real Estate

Svetlana Martin – Compass

Alexis Palacio – Coldwell Banker Realty

Ian Toder – Compass

Valli, Craig – Surterre Properties

Milestone Anniversaries

50 Years!

Ski Skawinski

20 Years!

Micahel Korhan

40 Years!

Rodney Plasencia • Lucille Harmon • Edward Fitch

10 Years!

Kathryn Hughes • Linda Duffy • Angela Caliger • Karen Wight • Bill Calhoun • Tami MacDonald • Pat Patterson

30 Years!

Carrie Allen

5 Years!

Joseph Garrett • Edward Hsu • Tricia Tedio-Smith • Matilda Lumpkin-Silvers • Jeffery Williams • Shellsy Ashen • Cherie Axelson • Courtney Hackbarth

CHARITY PICKLEBALL TOURNAMENT



PROCEEDS BENEFITTING



FEDERAL TAX ID: 95-2884608

Event Photographer:

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THANK YOU SPONSORS



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Marisa



Adam Vaughn
& Pat Patterson



Terry LeClair &
Daniel Chiose

CHARITY PICKLEBALL TOURNAMENT



The 2025 Charity Pickleball Tournament, held on July 23 at The Tennis and Pickleball Club at Newport Beach, was another incredible success in support of Childhelp Orange County. This annual event brings the community together to raise awareness and funds for Childhelp's mission to serve the needs of abused, neglected, and at-risk children through advocacy, treatment, prevention, and outreach.

A special thank you goes to Tournament Chair Hope Carr of Old Republic Title, whose leadership and dedication helped make this year's tournament such a memorable day.

We are so grateful to our generous sponsors: Robyn Price and Mia Beatificato with Fidelity National Home Warranty; Candy Babcock with First American Natural Hazard Disclosures; Ellie Ortiz with Laguna Legal; Vivian Chen with Exceed Lending; and California Regional MLS.

Additional thanks to Lynne Suzanski of All Signs, Inc. for donating our event banners, and Bob Ortiz for capturing all the action!

We truly appreciate everyone who contributed their time, resources, and support to help us make a difference.



Annual Membership Meeting

Financial Wellness Workshop;
Do You Have Your Affairs In
Order?



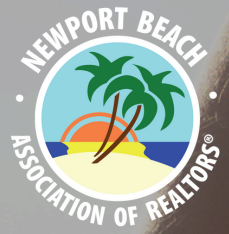
The Newport Beach Association of REALTORS® proudly hosted its 2025 Annual Membership Meeting at the Newport Beach Civic Center, bringing together members and affiliates for a morning of updates, education, and networking.



This year's meeting featured a legislative update highlighting key issues affecting the real estate industry, as well as a Financial Wellness segment focused on estate planning, 1031 exchanges, and retirement strategies. We were honored to welcome expert speakers who shared their knowledge and provided valuable tools to help our members better serve their clients and plan for the future.

We are grateful to all who attended and contributed to the success of this year's meeting. Your engagement and support help us continue to provide meaningful opportunities for growth and connection within our REALTOR® community.

BEACH CLEAN UP



Wednesday, August 6th

4:00pm

1 Newport Pier, Newport Beach, CA 92663

REGISTRATION IS REQUIRED.

Register by calling 949-722-2300

Open to NBAOR Members Only.

Mixer Afterwards at El Ranchito

2800 Newport Blvd, Newport Beach, CA 92663

Support your community and the environment by joining us for a local beach clean-up. It's a simple way to make a big difference, and a great opportunity to network with REALTORS® and affiliates outside the office.



FORMS & LEGAL UPDATE



REUBEN GULLEDGE, ESQ.
MANAGER, COMPASS



BRYAN ZUETEL, ESQ.
ZUETEL LAW GROUP



TUESDAY
SEPTEMBER 9TH



NEWPORT BEACH CIVIC CENTER

**100 CIVIC CENTER DR,
NEWPORT BEACH, CA 92660**

(949) 722-2300



TIME
1:00PM

NBAOR & LBOR REALTORS® - FREE
NON-MEMBERS - \$25.00

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JULIE LAUGHTON DESIGN BUILD & JLGC	JULIE LAUGHTON	JULIE@JULIELAUGHTON.COM	(714) 305-2861

Escrow

CHARTWELL ESCROW	DIANE ANTHONY	DANTHONY@CHARTWELLESCROW	949-354-1892
ESCROW TECHNOLOGIES	NATALIE WYTRZYMALSKI	NATALIE@ESCROWTECH.NET	847-651-1947
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PROMINENT ESCROW	JIM MECKLENBURG	JIM@PROMINENTESCROW.COM	949-375-4674

Health Benefits

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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
HOMEGUARD INC.	TINA MARIE SMITH	TSMITH@HOMEGUARD.COM	714-348-6463

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MONARCH COAST FINANCIAL	KEVIN BUDDE	KBUDDE@MONARCHCOASTFINANCIAL.COM	949-422-2075
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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
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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....

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WFG TITLE	ROBERT TOFFEL	ROBERT.TOFFEL@YAHOO.COM	949-702-3027

YOUR MEMBERSHIP TRIFECTA

THE

THREE-WAY

AGREEMENT

*The value of partnership
at every level.*

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Connections

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guidance and local market
expertise tailored to your business

Access to Multiple
Listing Service

Local networking and
educational opportunities

Grassroots advocacy
shaping local policies

Education opportunities
specific to your state

Legislative advocacy on
issues affecting your state

Statewide community of
real estate practitioners

State-level legal and
compliance resources

STATE
Expanding
Your Reach

Nationwide, unified
advocacy platform

Unmatched real estate
research, information,
expertise and education,
including accreditations
and designations

Cutting-edge
tech, legal and risk
management resources

National and global
network of professionals

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Your Future

YOUR DYNAMIC THREE-TIERED STRUCTURE:



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DIGITAL DOORKNOCKING: USING DMS AND COMMENTS TO BUILD RELATIONSHIPS

By Paige Brown

In real estate, relationships are everything. And while social media is packed with marketing potential, many agents are still using it as a one-way megaphone—posting listings and market stats, but stopping short of real connection. If you are not actively starting conversations, you’re leaving opportunities for lead generation on the table.

Think of social media as the dinner table. It’s where people gather, share their lives and talk about big decisions—like buying or selling a home. But how do you join those conversations without coming off as pushy or salesy?

That is where digital door knocking comes in! Reach out to your online audience in thoughtful, relationship-driven ways that can naturally lead to new clients and referrals. Here’s how you can start your digital doorknocking today!

Focus on engagement, not selling

Before you hit send on a direct message, or DM, as yourself: Am I adding value or just pitching? A warm lead starts with a warm conversation. Comment on posts, reply to Stories and send DMs that show genuine interest—whether it’s congratulating someone on a new job, complimenting their design style or offering advice when they mention the stresses of moving or homeownership.

Example DM: Hey! I saw your post about needing more space. If you ever want to chat about options, no pressure at all. Happy to answer any questions, anytime!

Use comments to plant seeds

Public comments are a great way to build visibility and credibility. Leave thoughtful, authentic comments on posts from friends, local businesses and community groups. Avoid generic lines like “Great post!” or “Thanks for sharing!” Instead, engage in the topic and add to the conversation.



This creates familiarity, so if you follow up with a DM later, you are not a stranger, you're someone they have already interacted with.

Turn replies into real conversations

Stories on Instagram and Facebook are a goldmine for casual conversation and connection. Story replies land directly in someone's DMs, making them a natural icebreaker.

Pro tip: Reply to Stories with specific comments or questions, not just reactions and emojis.

Example: That new restaurant looks amazing! Have you tried the steak? I've been wanting to check it out!

From there, keep the conversations going, and if it naturally turns toward real estate, great, if not, you're still building up that relationship.

Create conversation-friendly content

While you are on the hunt for posts and people to connect with, be sure that the content you post is in itself engaging. Post polls, "this or that" quizzes, question boxes or local tips that invite responses and encourage comments. The more your audience interacts with your content, and you interact with theirs, the easier it will be to slide into private conversations that feel natural.

The right time to transition the chat

If someone expresses real estate interest, offer helpful information or set up a casual call or in-person meet. Just don't force the transition too soon. Let the conversation evolve naturally and flow from personal to professional.

Example transition: It sounds like you're weighing your options. If it's helpful, I can send you a quick market update for your neighborhood—no pressure at all!

Go in with a "relationships first, business follows" mindset

Digital doorknocking isn't about cold-pitching strangers, it's about showing up consistently, being helpful and creating conversations that lead to real connections. Take the time to have conversations and get to know your audience and potential future clients. Be authentic and genuine in your conversations. When you prioritize relationships, the leads will come.



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**The market is
moving and so
should you!**

More Listings. Lower Rates.
More Opportunity.



Housing inventory is up

31.5%

vs. 2024*



Average mortgage rate is

6.6%

down from 7.04% in early 2025*

*Source: Realtor.com

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Monthly Market Report

Orange County

June 2025

Existing
SFR Home
Sales

1,061

% Change
from Last Year **+1.9%**

Existing SFR
Median Price

\$1.46M

% Change
from Last Year
+2.4%

Active Listings

2,612

% Change from
Last Year **+51.0%**

Market
Competition

Median Days
on Market **26**

Sales-to-List
Price % **99.7%**

% of Active
Listings with
Reduced Prices **38.1%**



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Monthly Market Report

Newport Beach, California

June 2025

Existing
SFR Home
Sales

62

% Change
from Last Year **+55.0%**

Existing SFR
Median Price

\$4.69M

% Change
from Last Year
-4.9%

Active Listings

290

% Change from
Last Year **+20.8%**

Market
Competition

Median Days
on Market **40**

Sales-to-List
Price % **97.4%**

% of Active
Listings with
Reduced Prices **35.2%**



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Monthly Market Report

Costa Mesa, California

June 2025

Existing SFR
Home Sales

47

% Change
from Last Year **+30.6%**

Existing SFR
Median Price

\$1.60M

% Change
from Last Year
+15.3%

Active Listings

58

% Change from
Last Year **+18.4%**

Market
Competition

Median Days
on Market **24**

Sales-to-List
Price % **98.7%**

% of Active
Listings with
Reduced Prices **29.3%**



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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.

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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.



JULIE LAUGHTON
DESIGN BUILD



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NEWPORT BEACH CITY MANAGER GRACE LEUNG TO RETIRE IN DECEMBER

After a 30-year career in local government, Newport Beach City Manager Grace K. Leung has announced that she plans to retire in late December 2025.

Leung has served as Newport Beach's city manager since September 2018, guiding the City of Newport Beach through a period of fiscal stability, strategic infrastructure investments and organizational improvements.

"Grace has provided strong, steady leadership for Newport Beach over the past seven years and will be greatly missed," said Mayor Joe Stapleton. "She leaves the City in excellent shape as we prepare for the next chapter in our leadership."

The Newport Beach City Council will discuss the selection process for her successor during a closed session at its July 8 meeting, Stapleton said.

During Leung's tenure, the City consistently maintained balanced budgets and high levels of service while paying down future debt obligations and investing in long-term infrastructure needs. She led organizational changes that improved efficiency and customer service, and placed a strong emphasis on public safety, technology and innovation.

Her accomplishments in Newport Beach include managing the City's response to the COVID-19 pandemic and state housing mandates, reducing homelessness, modernizing operations within the Police Department, and overseeing major infrastructure projects such as the Sunset Bridge, Newport Bay Trash Interceptor and the new Junior Lifeguard Headquarters.

Leung joined Newport Beach following more than two decades of public service in municipal administration, finance and budgeting. She previously held leadership roles with the cities of Sunnyvale and Irvine that included finance director, director of administrative services, assistant city manager, and interim city manager.



Maximize Your Retirement Savings with the NBAOR Solo(k) Solution!

As a **Newport Beach Association of Realtors (NBAOR)** member, you now have access to an exclusive **Fiduciary-Plus Retirement Plan Exchange Solo(k) Solution**—a turnkey 401(k) plan designed to help **business owners and their spouses** optimize their retirement savings while reducing administrative burdens.

Key Benefits:

- ✓ **Maximize Contributions** – Take advantage of higher contribution limits to grow your retirement fund faster.
- ✓ **Lower Costs** – Minimize administrative expenses with a streamlined, cost-efficient approach.
- ✓ **Expert Guidance** – Backed by **Marc DiDomenico & Erica Sylvia, Transamerica**, and **TAG Resources** to ensure expert support.
- ✓ **Smart Tax Strategies** – Enjoy both **pre-tax** and **Roth post-tax options** for greater flexibility.



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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

By providing information about the SoloK Plan, the Newport Beach Association of REALTORS® is not endorsing, recommending, or offering this plan as financial advice. The information provided is for informational purposes only and should not be considered a substitute for personalized investment advice from a qualified financial professional. Newport Beach Association of REALTORS® has not reviewed or evaluated the suitability of the SoloK Plan for any individual member. Each member is solely responsible for conducting their own due diligence and investigation before deciding to participate in this program. This includes carefully reviewing the plan documents, understanding the fees and expenses involved, and assessing the plan's investment options based on their individual financial goals and risk tolerance.

Newport Beach Association of REALTORS® specifically disclaims any and all liability arising from the use of the SoloK Plan. Members acknowledge that their participation in the plan is their own choice and assume all risks associated with such participation.

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The separate account investment choices offered are exempt from registration with the SEC; therefore, no prospectuses are filed for them. However, certain of the separate account investment choices, other than stable value investment choice(s), invest in mutual funds which are subject to SEC registration.

Target date options generally invest in a mix of stocks, bonds, cash equivalents, and potentially other asset classes, either directly or via underlying investments, and may be subject to all of the risks of these asset classes. The allocations become more conservative over time: The percentage of assets allocated to stocks will decrease while the percentage allocated to bonds will increase as the target date approaches. The higher the allocation is to stocks, the greater the risk. The principal value of the investment option is never guaranteed, including at and after the target date.

Stable value investments seek capital preservation, but they do carry potential risks. Stable value investments may be comprised of or may invest in annuity or investment contracts issued by life insurance companies, banks, and other financial institutions. Stable value investments are subject to the risk that the insurance company or other financial institution will fail to meet its commitments, and are also subject to general bond market risks, including interest rate risk and credit risk.

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CONTACT

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August

CALENDAR OF EVENTS

2025

Sun

Mon

Tue

Wed

Thu

Fri

Sat

1

2

3

4

Affiliates
Meeting 1:00pm

5

California
Residential
Purchase
Agreement-
Learnmyway

6

YPN Beach
Clean-Up
4:00pm

7

8

45 Hour License
Renewal Course
9:00am

9

10

11

Real Estate
Kickstarter

12

13

Supra eKey
Training
8:00am
NAR's Senior Real Estate
Specialist Designation
Day 1- Learnmyway

14

NAR's Senior Real
Estate Specialist
Designation
Day 2-
Learnmyway

15

16

17

18

Mastering Real
Estate
Representation

19

20

Growing Green:
Environmental
Awareness and
Your Real Estate
Practice

21

22

45 Hour License
Renewal Course
9:00am

23

24

25

26

27

CRMLS Matrix
Training: Cloud
CMA

28

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