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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®*

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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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Kimberly Foreman, RCE  
Janelle Genovese

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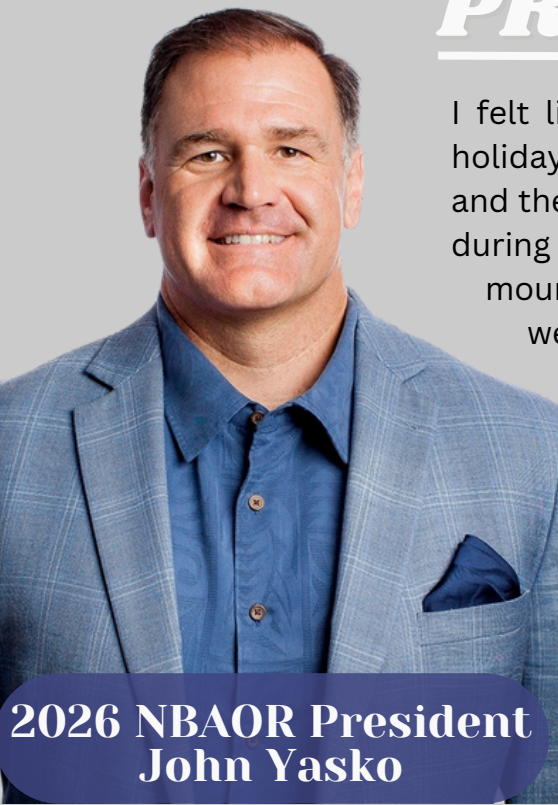
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# ***PRESIDENT'S MESSAGE***

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**2026 NBAOR President  
John Yasko**

I felt like I've missed Winter and moved straight from the end of year holidays to Summer. I haven't gotten enough ski days on my IKON pass and the significant storm that left Mammoth with about 80 inches of snow during February's Ski Week has already melted in town. Up on the mountain, however, coverage and conditions were still great this past week, that is from 8:30 a.m. to about 1:00 p.m. But with the lack of snow in town, that meant getting out the bikes and cycling up to Twin Lakes and to the snow line. Spring skiing is expected to continue at Mammoth Mountain until Memorial Day so if you are heading there for your spring break next week, you'll have a great time. But how about this Summer weather we have had in Winter? While it has not helped the ski industry, or our water supply, the heat has lent itself to a Winter buying frenzy in our local real estate market. January and February months appear to have been well ahead of last year. That is what I am hearing locally, though maybe not on a national level.

However, if you've felt like the market hit the pause button over the past few weeks.... you may not be wrong. Between global headlines, rising oil prices and inflation this month, and mortgage rates jumping faster than most of our buyers would like, this spring market may be coming in with a bit more hesitation than hype. Rates have moved from approximately 5.99% at the onset of the conflict in Iran to 6.38% in just a matter of weeks, reminding us all that while we don't control the market, we are expected to navigate it.

The result of these variables? A housing market that, in many ways, may go into a holding pattern. Buyers are still out there, but appear more cautious, more analytical, and more payment sensitive as world events unfold. At the same time, there appears to be more sellers entering the market, and the new inventory appears being absorbed at nearly the same pace. There are still many sellers that will stay put a bit longer, locked into their historically low rates. This isn't a lack of demand, it's a temporary standoff between motivation and affordability.

And yet, this is exactly where great REALTORS® separate themselves. There are always sellers and buyers in the marketplace, and it is our job to find them, and serve them.

At the same time, our industry is undergoing one of the most significant, and fastest-moving shifts I've seen in years. I am watching closely but it is hard to keep up with the news. What began as a high-profile lawsuit between a broker and Zillow months ago, over listing control, now appears to be evolving into a complete rethinking of how homes are brought to market. Zillow's introduction of "Zillow Preview," which allows pre-market listings to be publicly displayed, prompted a broker to drop its lawsuit, effectively ending one of the industry's most closely watched battles. And in doing so, has sparked something bigger.

# ***PRESIDENT'S MESSAGE CONTINUED***

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Hopefully you participated in the survey emailed from CRMLS to thousands of its members (that is if you had already transacted in 2026) requesting your opinion about CCP (Clear Cooperation Policy). There has been a rapid adoption of new listing strategies, with major brokerages aligning around both public pre-market exposure and private listing networks. What was once a debate has quickly become a race, one centered on control, access, and visibility. The question is no longer whether the industry is changing, it's how, and how fast.

On one side, there is a push for greater transparency and broader exposure. On the other, a move toward more controlled, platform-driven ecosystems. And as these models evolve, questions around fair housing, cooperation, and consumer access are becoming more important than ever. And speaking of Fair Housing, April is Fair Housing Month, and Fair Housing Day is on April 14th. Sharing the C.A.R. event link here in case it's helpful: <https://www.fairhousingcalifornia.org/event-info/2026-c-a-r-5th-annual-fair-housing-day>

Recent data continues to reinforce that the MLS remains the backbone of cooperation in our industry.

And despite all the headlines following last year's NAR settlement, I just read that commissions have remained remarkably stable, further validating the value of your professional representation.

Here at the Newport Beach Association of REALTORS®, our mission remains clear, to unite those engaged in the recognized branches of the real estate profession for the purpose of exerting a beneficial influence upon the profession and related interests. To be the advocate for REALTORS® professionalism, profitability and success while defending the private property rights of the communities we serve.

Happy Spring,

*John Yasko*





# BRANDI RIVERA

## SENIOR ESCROW OFFICER



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[brivera@GenEscrow.com](mailto:brivera@GenEscrow.com)

*Brandi brings 28 years of experience in escrow, backed by a deep understanding of the real estate industry from customer service to complex transactions. As a trusted, neutral professional, she protects her clients' funds and information while providing reassurance, clarity, and exceptional service—especially for first-time homebuyers.*

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# *IMPORTANT: STATUS UPDATE REQUIRED FOR PREVIEW INCLUSION*

We are seeing an increasing number of listings in **Coming Soon** status missing the Preview Sheet.

If you are planning to launch your listing on preview day, please remember: **The listing must be converted from Coming Soon to Active status prior to the preview cutoff deadline.**

Per MLS Rules, no showings are permitted while a listing is in Coming Soon status. Because of this restriction, the Matrix system will not include Coming Soon listings in the preview report. If the status is not updated to Active before the deadline, the property will not appear on the Preview Sheet.

## **Newport Beach / Costa Mesa Preview Schedule**

**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

## **Important Deadline**

**Cutoff: 9:00 AM the day prior to the scheduled preview date**

To ensure your listing is included, please update the status before the deadline.

If you have any questions about timing or status changes, feel free to reach out to the Association staff, we're happy to help. If you find yourself converting a Coming Soon listing to Active specifically for Preview, our staff would be happy to double-check that it is appearing on the list before it is emailed to the membership.

# WELCOME

## DESIGNATED REALTOR® MEMBERSHIP

**David Austin**- David Austin, Broker

**Lilyanna Reed**- Lilyanna Reed, Broker

## MLS ONLY BROKER

**Tuan Tran**- 3T Homes Inc

## REALTOR® MEMBERSHIP

**Olga Jakonowska** – Coldwell Banker Realty

**Chelsea Jarrell** – Seven Eight Realty

**Brandon Schmitt** – Abrams Coastal Properties

**Melissa Stein** - Compass

## AFFILIATE

**Hallie Paciard**- First American Title

**Jason Kelly**- Grasons Co Newport Beach

**Harrison Koenig**- Granite Escrow & Settlement Services

## MEMBER TRANSFERS

**Jessica Cano** – from Real Broker Technologies to eXp Realty of California

**Lisa Hoffman** – from Compass to First Team Real Estate

**Alex Horne** – from Coldwell Banker Realty to Reframe

**Tricia Tedio-Smith** – from Douglas Elliman to Pacific Sothebys Int'l

**Gigi Thomas** – from eXP Realty of California to First Team R.E. Orange

**Alex Turner** - from Compass to LPT Realty

**Carter Weir** – from Berkshire Hathaway HomeServices to Pacific Sotheby's Int'l

## Milestone Anniversaries

### **30 Years!**

Chris Moore • Tony Bartos

### **20 Years!**

Lori Wright • Annie Clougherty • Kirstin Temesvary • Tom Billings • Derrick Mercurio •  
Regan Beegle • John Lake • Chris McCray • Adriana Farfan

### **10 Years!**

Alan Forniss • Jason Foreman • Liz Hansche • Stephanie Peterson •  
Ariana Gaffoglio

### **5 Years!**

Randall Mycorn • Blair Walsh • Mark Delgado • Jeff Stearman • Patrick Leeke

### **1 Year!**

Isaiah Kim • Nasimeh Miles • Blake Lincoln • Michele Howorth • Sebastian Miles • Roman Kozak •  
Kevin Kiser • Leah Cowley • John Aguilera • Noelle Bagnall • Jeannine Jacobs-Abraham • Patrice  
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# *YPN LUNCH & LEARN:* **BUILDING SUCCESS IN REAL ESTATE**

*IN HONOR OF WOMEN'S HISTORY MONTH*



The Newport Beach Association of REALTORS® Young Professionals Network recently hosted a successful Lunch & Learn titled Building Success in Real Estate, held in recognition of Women's History Month.

The event featured an engaging panel of industry professionals, including Marcy Weinstein and Cari Young, who shared their personal experiences, career journeys, and insights into building lasting success in real estate. Each speaker offered a unique perspective, highlighting the importance of resilience, adaptability, and relationship-building in today's market.

The conversation offered practical takeaways that attendees could apply to their own businesses, from staying consistent through market shifts to building a strong personal brand and client base. The panelists emphasized that success in real estate is built over time through dedication, authenticity, and continuous growth.

We appreciate everyone who joined us for this event and contributed to such a positive and engaging atmosphere. A special thank you to our sponsors, Generations Escrow and My NHD, for helping make this program possible.

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DAY**

**TUESDAY, APRIL 14, 2026  
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**[on.car.org/fhday26](https://on.car.org/fhday26)**



FAIR HOUSING



CALIFORNIA  
ASSOCIATION  
OF REALTORS®





# 5TH ANNUAL

# FAIR

# HOUSING

# DAY

APRIL 14, 2026  
UNIVERSITY OF CALIFORNIA, BERKELEY



KEYNOTE SPEAKER  
ANDRE M. PERRY

## 2026 Keynote Presentation: Race and Structural Inequality, Education, and Economic Inclusion

We're excited to announce that Andre M. Perry will be our keynote speaker at the 5th Annual C.A.R. Fair Housing Day on April 14! Perry is a senior fellow and director of the Center for Community Uplift at the Brookings Institution. He is also a professor of practice of economics at Washington University of St. Louis. Perry is a regular contributor to MSNBC and has been published by numerous national media outlets, including The New York Times, The Washington Post, The Nation, Bloomberg CityLab and CNN.com. Perry has also made appearances on HBO, CNN, PBS, National Public Radio, NBC, and ABC. Perry's research focuses on race and structural inequality, education, and economic inclusion.

Perry's pioneering work on asset devaluation has made him a go-to researcher for policymakers, community development professionals and civil rights groups.

Perry co-authored the groundbreaking 2018 Brookings Institution report, "The Devaluation of Assets in Black Neighborhoods," and has presented its findings on the price of homes in Black neighborhoods across the country, including to the U.S. House Financial Services Committee.

[Click Here to Register](#)

# AFFILIATE

of the Month

ALEX  
KAZARYAN



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(818) 497-4072



**PROPERTY**  
LENDING GROUP

Alex Kazaryan is a dedicated loan officer committed to helping clients navigate the complexities of the mortgage process with clarity and confidence. Known for providing personalized guidance and securing the most competitive loan solutions available, Alex takes pride in delivering results that align with each client's unique financial goals.

With deep industry knowledge and a passion for client success, Alex specializes in a wide range of residential loan programs. His expertise spans from straightforward full-documentation loans to more complex scenarios, including bank statement programs, profit-and-loss (P&L) loans, stated-income solutions, DSCR loans, asset depletion loans and alternative documentation financing.

His approach is simple: **BORROW SMART FROM THE START** - understand the client's situation, structure the deal correctly, and get it done. **For Alex, it's never about fitting the client into a loan—it's about finding the right loan for the client.** If you're looking for experience, versatility, and results, you're in the right place.

**@KazaryanAlex**

# NEWPORT BEACH ASSOCIATION OF REALTORS® AFFILIATE ROSTER



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FLAGSTAR PRIVATE BANK	ALISON SCHWEITZEL	<a href="mailto:ALISON.SCHWEITZER@FLAGSTAR.COM">ALISON.SCHWEITZER@FLAGSTAR.COM</a>	949-274-3560
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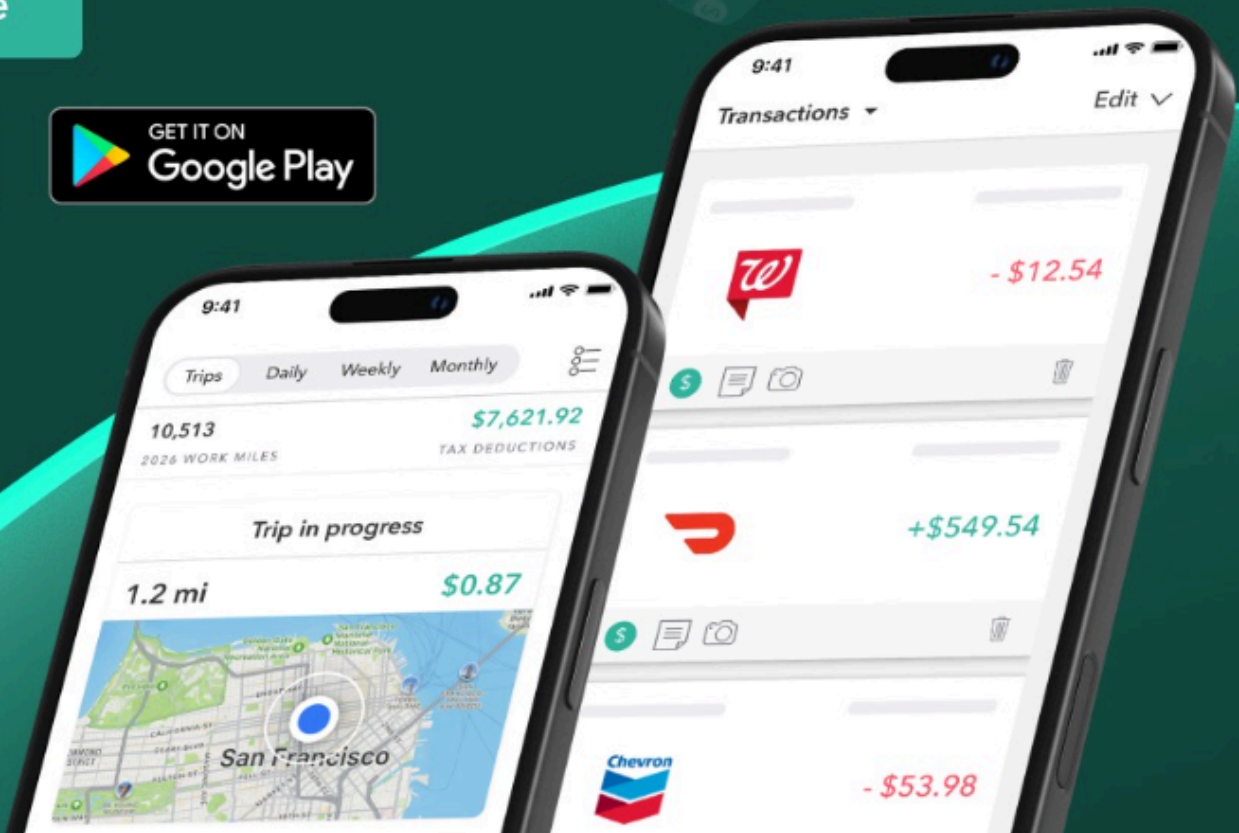
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***COMING SOON LISTINGS  
ENTERED SINCE MARCH 10 WILL  
NOW BE PUBLICLY SYNDICATED***

## **CRMLS UPDATE**

Due to the 21-day Coming Soon period, listings entered into the MLS on or after March 10 will now begin appearing in IDX syndication and be visible on public portals and third-party sites.

This update was made in response to feedback from CRMLS users and their clients. Increased exposure for sellers, greater buyer interest, and improved transparency and cooperation between agents are key benefits.

Please note, showings are still not permitted while a listing is in Coming Soon status. Listings must be changed to Active before any showings can take place.

No action is required. You may begin seeing more Coming Soon listings visible to the public.

# PROMINENT

ESCROW SERVICES

## MEET TEAM JASON

### JASON MILLER

With 25 years of escrow experience in Southern California's premier coastal markets, Jason is a luxury Escrow Officer known for expertly closing high-value, complex transactions in Newport Beach and surrounding communities.

### BETTY HERNANDEZ

Betty brings over 20 years of escrow experience, specializing in residential sales and delivering smooth, detail-driven transactions from start to finish.

### PROUDLY INDEPENDENT

Proudly independent and not affiliated with any brokerage, allowing us to remain completely neutral while always putting your best interests first.



23 Corporate Plaza Dr, Suite 200, Newport Beach, CA, 92660

Jason Miller | Escrow Officer | Direct (949) 258-4804 [Jason@ProminentEscrow.com](mailto:Jason@ProminentEscrow.com)

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# *YOUR SOCIAL MEDIA PROFILE IS THE FIRST PLACE CLIENTS LOOK—MAKE SURE IT'S WORKING FOR YOU*

When potential clients hear your name, the first thing they often do is look you up online. More often than not, the first result they click is not your brokerage website—it's your social media profile.

Whether it's your Instagram, Facebook, LinkedIn or even TikTok, your social platforms have become your digital first impression. Buyers and sellers are using these landing pages to decide if you look professional, appear knowledgeable and, most important, seem like someone they can trust.

While some agents treat their profiles like a place to post listings, it can act as an important marketing tool that works for you every day. Taking the time to review and refine your social media presence can make a significant difference in how many inquiries you receive, and the quality of the clients reaching out to you.

## ***Start with your bio: Make it clear who you help and where***

One of the most common mistakes agents make is writing a bio that is too vague. A profile that simply says “Realtor” or “Helping people buy and sell homes” doesn't give potential clients a reason to choose you over someone else.

Your bio should quickly answer:

- Who you help: Do you specialize in homebuyers, homesellers, etc.?
- Where you work: Your market(s) are one of the most important pieces of information when it comes to clients working with you.
- What makes you different: If you have a niche, promote it here. Luxury, relocation, families, first-time buyers, etc.

Instead of a generic description, try something more specific:

- Helping first-time buyers in New York City find the right home
- Luxury home specialist serving the Scottsdale area
- Local market expert | Buyers, sellers and relocation clients

Clarity builds confidence, and when someone lands on your social media profile, they should immediately know they're in the right place.



# *YOUR SOCIAL MEDIA PROFILE IS THE FIRST PLACE CLIENTS LOOK—MAKE SURE IT'S WORKING FOR YOU*

## **Utilize visuals: Check your profile photo and branding**

Your profile photo is often the first thing people notice, and it should reflect the same level of professionalism you would bring to a listing presentation. Your photo should be a high quality, well-lit headshot, recent and consistent across all of your platforms.

Beyond your profile photo, look at your overall branding. Your colors, logo, banner images and highlights should feel cohesive. If your Facebook looks one way, your Instagram another and your LinkedIn something else entirely, it can make your brand feel less established.

Consistency helps build recognition, and recognition builds trust.

## ***Make updates: Remove old posts that don't represent your business***

Scroll back through your feed the way a potential client visiting your profile would. What do they see in the first few rows of posts, the first few links or the first set images? If the answer is outdated listings, blurry photos, long gaps between posts or content that doesn't reflect your current business, it may be time for an update.

While you don't have to (and shouldn't) delete everything, you should consider removing or archiving posts that:

- Contain outdated contact information
- Look unprofessional or no longer represent your business
- No longer reflect your market or niche
- Confuse what it is you do

Your social media profile should feel active and current, even if you're not posting every day.

Read: [Balancing Your Social Content For Better Lead Gen: The 70/20/10 Rule](#)

Promote the important items: Pin or highlight the content you want clients to see first. Most platforms allow you to pin posts or create highlights, and agents should be using these features strategically. Pinned posts should act as your introduction to new visitors, including: Short introduction video; recent success story or testimonial; or market updates.

Reprinted with permission of RISMedia



# *YOUR SOCIAL MEDIA PROFILE IS THE FIRST PLACE CLIENTS LOOK—MAKE SURE IT'S WORKING FOR YOU*

On Instagram, story highlights can serve the same purpose. Create highlights for things such as buying tips, selling tips, local spots, market highlights, recent closings, client reviews, etc. This helps potential clients quickly understand what you do without having to scroll through months of content.

## ***Include contact info: Make it easy for potential clients to reach you***

One of the biggest missed opportunities on social media is not making it obvious how to get in touch. Make sure that your profile includes your phone number, email address, website link, brokerage name (and branding), location and market area. Be sure to test the links yourself to make sure they work. A broken link or missing contact information can mean losing a lead before you even knew they were interested.

If possible, link to a page where people can easily take the next step, such as a home search page with your current listings, a contact or lead generation form, a buyer or seller guide, or your booking calendar. The easier you make it to reach you, the more likely people are to do it.

## ***Small updates can lead to better leads***

You don't need a full rebrand or a complicated strategy to improve your social media presence. Often, a simple audit of your profile can make a noticeable difference in how potential clients see you online.

Your social media page isn't just a place to post listings. It's your introduction, your reputation and your marketing—all in one. Making sure it accurately reflects your business, professionalism and personality can help turn more profile visits into real conversations, and conversations into clients.



# LAGUNA LEGAL

Living Trusts • Probate • Document Recording • Deeds • Divorce



**GET NEW LISTINGS!  
USE OUR MONTHLY MEMBERSHIP  
TO HELP YOUR CLIENTS  
AND GAIN LOYALTY**

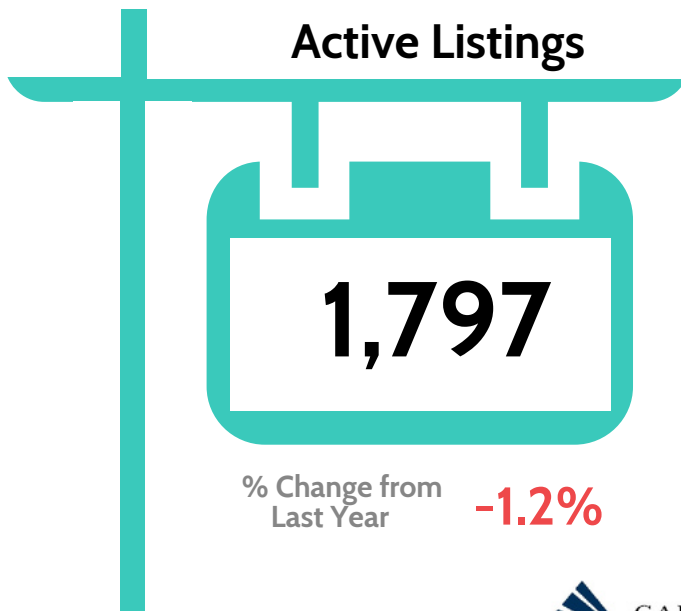
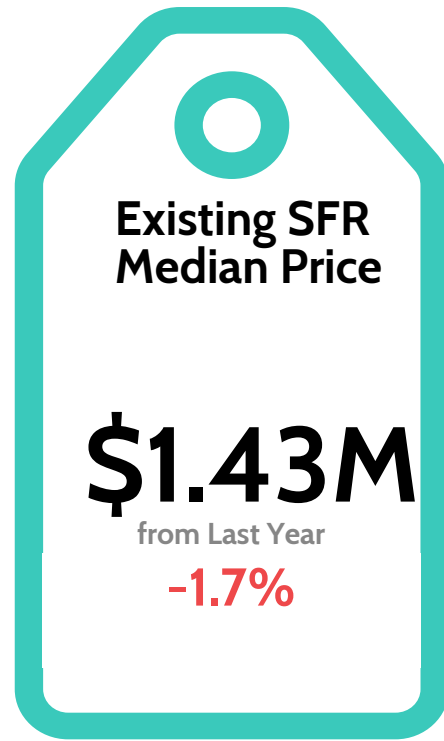
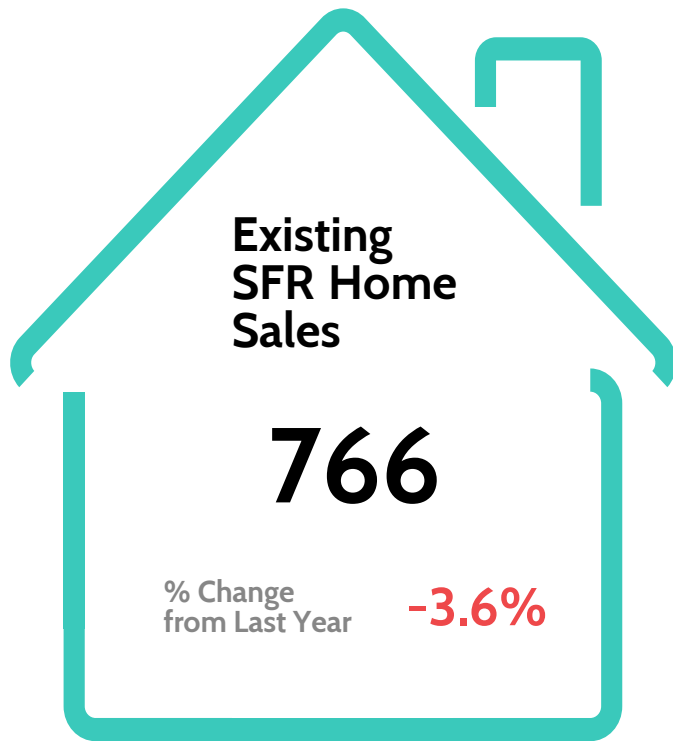
**2025  
ANNUAL BUSINESS REPORT  
IS NOW AVAILABLE**

**[CLICK HERE TO VIEW](#)**

# Monthly Market Report

## Orange County

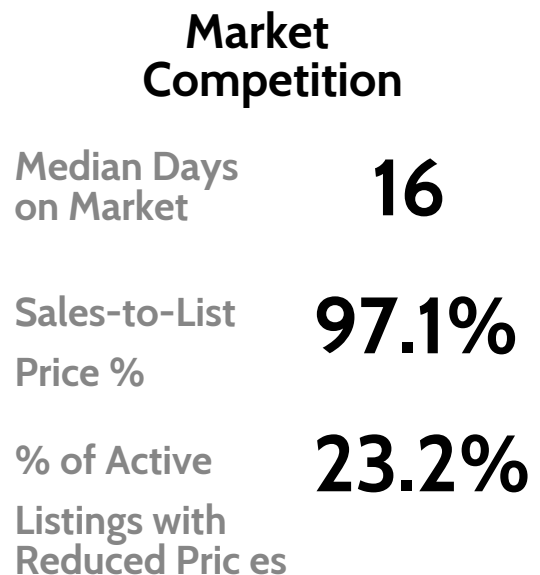
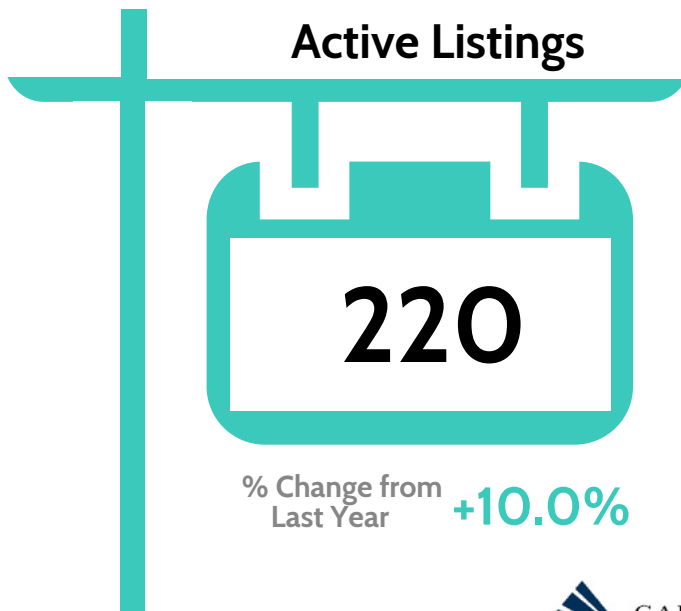
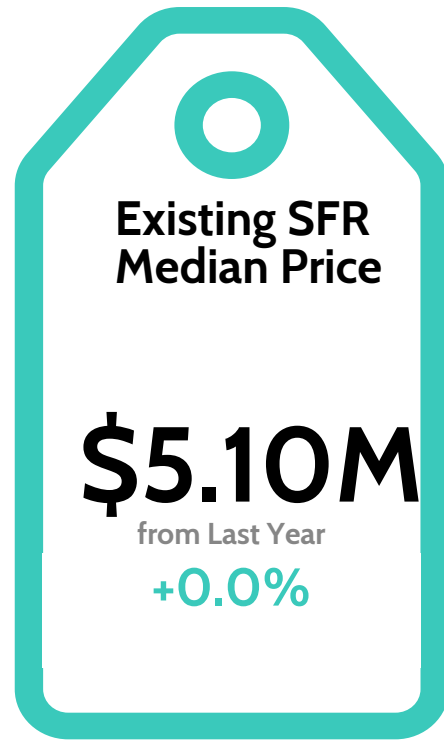
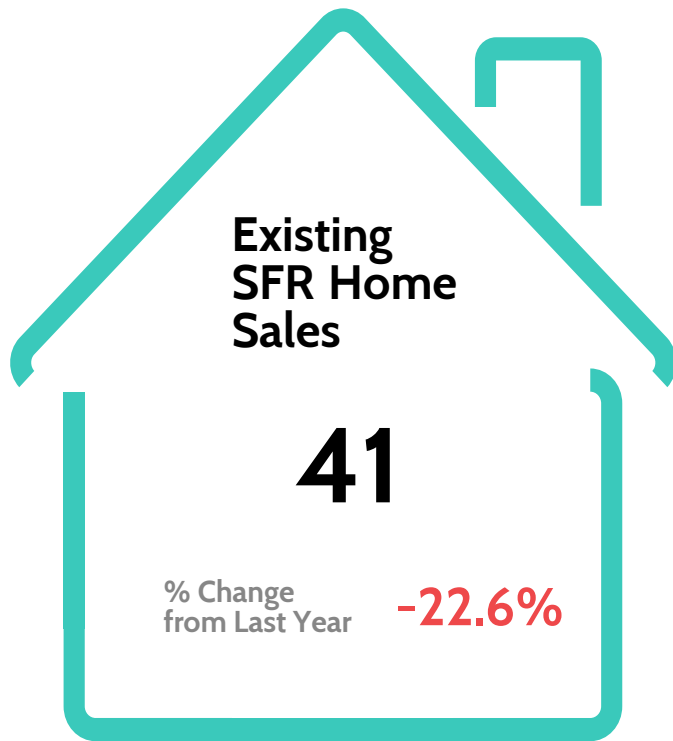
### February 2026



# Monthly Market Report

## Newport Beach, California

### February 2026



# Monthly Market Report Costa Mesa, California

## February 2026

Existing SFR  
Home Sales

**23**

% Change  
from Last Year **-34.3%**

Existing SFR  
Median Price

**\$1.65M**

from Last Year  
**+2.2%**

Active Listings

**54**

% Change from  
Last Year **-3.6%**

Market  
Competition

Median Days  
on Market **20**

Sales-to-List  
Price % **100.0%**

% of Active  
Listings with  
Reduced Prices **38.9%**





## When your buyers want a larger loan, we're ready to make it happen

Learn more about how our local market knowledge and jumbo loan options which may help your affluent buyers bring their plans to life.

For questions about services or help getting started, call or text anytime for assistance.



**Matt Didier**  
Private Mortgage Banker  
949-371-9718  
OCMortgageLender.com  
NMLSR ID 463518





## E-Waste & Document Shredding Event

**SATURDAY**  
**APRIL 25, 2026**  
8:00 AM - 12:00 PM

*Please Contact the Municipal Operations Department with any questions - 949-644-3055*

### Document Shredding

- Up to 10 boxes per household
- No X-Rays
- No Binders

*While Services Last*

### E-Waste\*

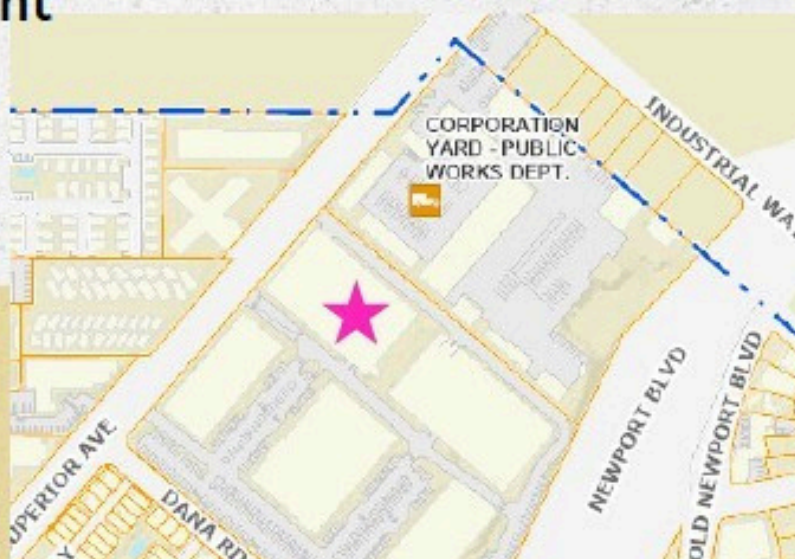
- Computers, Tablets, VCR's, and Monitors
- Stereos/Radios, Calculators, etc.
- TV's - Flat Panel, LCD, OLED, Plasma
- Fax Machines, Copiers, Printers
- Phones - Cell and Corded
- Answering Machines
- Window A/C Units
- Microwaves and Mini Refrigerators

*\*No Batteries or Hazardous Waste*

### Municipal Operations Department

**Corporation Yard**  
**592 Superior Ave**  
*Please Enter on Superior*

**For Current Newport Beach Residents**  
**Please bring photo ID or other proof**  
**of residency that includes your zip**  
**code.**



# SavvyCard® for Real Estate Agents

## Take Your Leads Back from the Portals

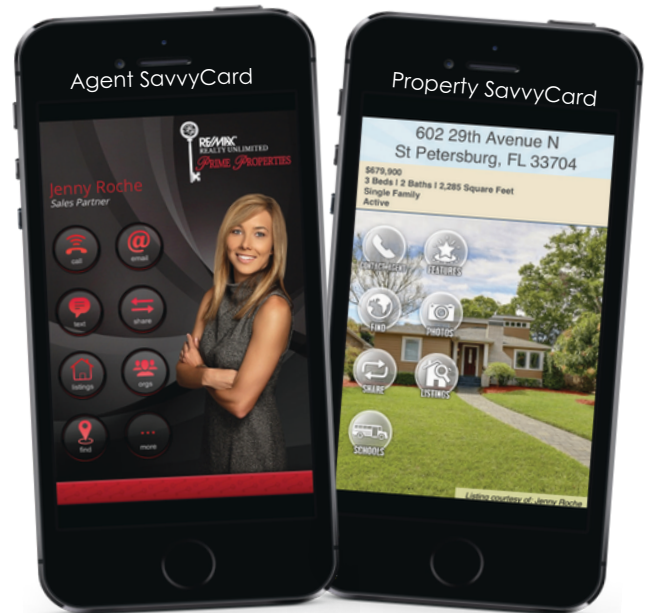
SavvyCard® for Real Estate uses MLS data to automatically create and maintain lead generating SavvyCards for you and your listings. Use SavvyCards to generate leads online through Social Media and through your customer's friends and family, quickly and inexpensively!

### Grow Your Business

- Generate leads with push-button ease
- Empower your referral networking
- Increase social media exposure
- Close more deals

### Valuable Tools at Your Fingertips

- Stand-alone web apps for you and all your listings
- Lead capture forms
- Push-Button social media marketing
- Real-time referral notifications (with contact info)



Lee Childress REALTOR®, Premiere Homes Group

"SavvyCard is the best Real Estate tool I have, in fact I am closing on a Property this weekend because of it. I love that it reports referrals back to me. This is how I got my last customer."



Tim Gupton REALTOR®/Broker, Realty One

"To be able to text people I meet a tool with an MLS search right to their phone is a great way to keep them locked in with me as their agent. And, having the seller share their listing to their circle of friends reaches a whole new level of potential clients through social media, too."



Shelly Hartman - Broker Associate, RE/MAX Realty Consultants

"Property SavvyCards are super easy to post to Facebook and the ability for me to access SellerShare™ at the time put the listing into Matrix is awesome. My listings are getting a lot of activity, which is what all us agents want."

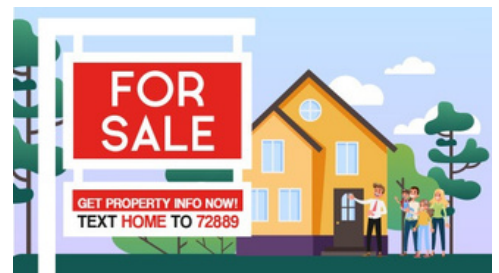
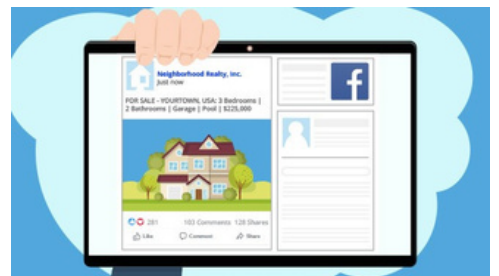
(Continued on back)

# SavvyCard® for Real Estate Agents

## Take Your Leads Back from the Portals

### Advanced Features and Services

- SavvySchool - Your on demand resource center
  - Orientation & Training Videos
  - eBooks & Infographics
  - Sales Strategy Videos
  - Downloadable Tutorials & Guides
- Automated Facebook Ads - Done-for-You Facebook Ads service
  - Maximize lead generation
  - Maximize brand exposure
  - Maximize social engagement
- SavvySigns - Uses geo-location to provide buyers immediate access to property information
  - Easy to use - text HOME to 72889
  - No set-up, maintenance, installs or downloads
  - Universal sign rider for all your listings
- SellerShare - A powerful push button marketing tool
  - Brings your sellers into the marketing process
  - Leverages your seller's sphere of influence
  - Puts your "for sale" sign in your seller's digital front yard




**Now Available on Your MLS Dashboard**  
**SavvyCard Education & Training**





## COSTA MESA RECOGNIZED WITH TREE CITY USA DESIGNATION FOR THE 21ST YEAR



The City of Costa Mesa has once again been recognized as a Tree City USA by the Arbor Day Foundation. 2025 marks the 21st year that the city has met all the criteria required to receive this designation.

Earning Tree City USA recognition is a great accomplishment for our community as it recognizes the City's commitment to growing and maintaining its urban forest.

According to the Arbor Day Foundation, a thriving urban forest offers a number of advantages to the community such as:

- Trees help absorb the sounds of traffic in urban areas by 40%.
- Neighborhoods with trees are seven to nine degrees cooler than those without.
- Trees reduce energy costs up to 25% by shading buildings and protecting them from winter winds.
- Homes with trees have higher property values.
- Green space plays a major role in improving mental and physical health.
- Planting and maintaining trees absorbs carbon dioxide in the atmosphere, mitigating the effects of climate change.



# 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.



[www.nbaor.com](http://www.nbaor.com)



[info@nbaor.com](mailto:info@nbaor.com)



(949) 722-2300

# SOLO(k) SOLUTION



## Newport Beach Association of Realtors RETIREMENT PLAN EXCHANGE<sup>®</sup>

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: \$43,500<sup>1</sup>
- 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.

<sup>1</sup> Maximum profit share is contingent upon income.



## INVESTMENT STRUCTURE - FIDUCIARY-PLUS

TARGET DATE FUNDS/ASSET ALLOCATION FUNDS	
<p><b>TARGET DATE FUNDS (QDIA)</b>            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</p>	<p><b>ASSET ALLOCATION FUNDS</b>            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</p>
PASSIVE CORE OPTIONS	
<p><b>INTERMEDIATE-TERM BOND</b>            Fidelity U.S. Bond Index Ret Acct</p> <p><b>LARGE CAP BLEND</b>            Fidelity 500 Index Ret Acct</p> <p><b>MID CAP BLEND</b>            Fidelity Mid Cap Index Ret Acct</p>	<p><b>SMALL CAP BLEND</b>            Fidelity Small Cap Index Ret Acct</p> <p><b>WORLD/FOREIGN STOCK</b>            Fidelity Total International Index Ret Acct</p>
ACTIVE CORE OPTIONS	
<p><b>CASH EQUIVALENT</b>            Transamerica Stable Value Advantage</p> <p><b>INTERMEDIATE-TERM BOND</b>            Metropolitan West Total Return Bond Ret Acct            PIMCO Income Ret Acct</p> <p><b>LARGE CAP VALUE</b>            BlackRock Equity Dividend Ret Acct</p> <p><b>LARGE CAP GROWTH</b>            JPMorgan Large Cap Growth Ret Acct</p> <p><b>SMALL CAP VALUE</b>            DFA U.S. Targeted Value Portfolio Ret Acct</p>	<p><b>SMALL CAP GROWTH</b>            Janus Henderson Trilon Ret Acct</p> <p><b>REAL ESTATE</b>            DFA Global Real Estate Securities Ret Acct</p> <p><b>WORLD/FOREIGN STOCK</b>            MFS International Diversification Ret Acct</p>

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.

Registered funds are available by prospectus only. Any mutual fund offered under the plan is distributed by that particular fund's associated fund family and its affiliated broker-dealer or other broker-dealers with effective selling agreements such as Transamerica Investors Securities Corporation (TISC), member FINRA, 440 Mamaroneck Avenue, Harrison, NY 10528. For more information on any registered fund, please call Transamerica Retirement Solutions at 800-755-5801 for a free summary prospectus (if available) and/or prospectus. All investments involve risk, including loss of principal, and there is no guarantee of profits. You should consider the objectives, risks, charges, and expenses of an investment carefully before investing. The summary prospectus and prospectus contain this and other information. Read them carefully before you invest. All Transamerica companies identified are affiliated.

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.

## Contact Us Today



### CONTACT

TAG Resources



### EMAIL

[info@tagresources.com](mailto:info@tagresources.com)



### CALL

866-315-1463

This is provided for informational purposes only and is not intended to constitute compliance with any applicable legally required disclosures, including, but not limited to, disclosures required under ERISA Section 408(b)(2). Other fees may apply.

*Retirement Plan Exchange*<sup>®</sup> is a registered service mark of Transamerica. The plan is not a Multiple Employer Plan (MEP). Unlike a MEP, certain plan qualification and ERISA requirements are applied at the individual plan level. An employer participating in the plan retains certain fiduciary responsibilities, including responsibility for retaining and monitoring the 3(16) plan administrator, for determining the reasonableness of its fees, and for periodically reviewing the plan as a whole.

Before adopting any plan, you should carefully consider all of the benefits, risks, and costs associated with a plan. Information regarding retirement plans is general and is not intended as legal or tax advice. Retirement plans are complex, and the federal and state laws or regulations on which they are based vary for each type of plan and are subject to change. In addition, some products, investment vehicles, and services may not be available or appropriate in all workplace retirement plans. Plan sponsors and plan administrators may wish to seek the advice of legal counsel or a tax professional to address their specific situations.

Logos and trademarks are the intellectual property of their respective owners. Administrative Group, LLC dba TAG is a wholly owned subsidiary of Transamerica, but there are no other affiliations between the two and any other organization referenced.

The Fiduciary-Plus Investment Manager 3(38) services, when offered, are provided by RPA Financial, LLC, a registered investment advisor. RPA Financial, LLC does not provide legal or tax advice.

By providing information about the SoloK Plan, the Newport Beach Association of REALTORS<sup>®</sup> 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<sup>®</sup> 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.

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# April

## CALENDAR OF EVENTS

# 2026

Sun

Mon

Tue

Wed

Thu

Fri

Sat

**1**

Growing Green:  
Environmental  
Awareness and  
Your Real Estate  
Practice

**2**

**3**

Office Closes  
at 12:00PM

**4**

**5**

Happy  
Easter

**6**

Affiliate  
Meeting  
1:00pm

**7**

**8**

Supra eKey  
Basic &  
Professional  
Traning 8:00AM

**9**

C.A.R. Dispute  
Resolution Center  
and Best Practices  
12:00 PM  
Boost Efficiency and  
Productivity in zipForms  
1:00PM

**10**

45 Hour License  
Renewal Course  
9:00am

**11**

**12**

**13**

Mastering Real  
Estate  
Representation

**14**

Digital Signatures  
inside zipForms &  
Transact  
**FAIR HOUSING  
DAY**

**15**

**16**

**17**

**18**

**19**

**20**

Real Estate  
Kickstarter

**21**

C.A.R. Expert  
Office Hours  
10:00am

**22**

The California  
Rental Market Right  
Now: Data, Demand,  
and Opportunity  
10:00 AM

**23**

**24**

45 Hour License  
Renewal Course  
9:00am

**25**

**26**

**27**

CRMLS Matrix:  
Managing  
Listings  
9:00AM

**28**

Rebuilding the  
California Dream:  
Pathways to Entry-  
Level Homeownership  
3:00pm

**29**

**30**

*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**