

JUNE 2026

COASTAL REALTOR® NEWSLETTER

OFFICIAL PUBLICATION OF THE
NEWPORT BEACH ASSOCIATION OF REALTORS®





COASTAL REALTOR®


NEWSLETTER

Official Publication of the
Newport Beach Association of REALTORS®

ABOUT NBAOR

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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PRESIDENT'S MESSAGE



2026 NBAOR President
John Yasko



As we head into summer, one thing is becoming increasingly clear, that is the real estate industry is navigating one of the most significant periods of technological, structural, and philosophical change in decades!

Between fluctuating mortgage rates, affordability challenges due to increasing oil prices, increasing inflation and mortgage rates, artificial intelligence, evolving listing

strategies, portal partnerships, and ongoing debates surrounding transparency and cooperation, there is certainly no shortage of conversation topics in real estate right now. Over the past several months, I've shared thoughts about the importance of adaptability, professionalism, and maintaining perspective during periods of uncertainty and transition. As we move into June, those themes continue to resonate even more strongly as both our industry and housing market evolve at an accelerated pace.

And if you've attended enough industry meetings lately like I have, you may have also learned that REALTORS® comfortably use terms like AI, CCP, MLS, IDX, VOW, syndication, and pre-marketing all within the same sentence — which either means our industry is evolving rapidly... or we've all simply become addicted to acronyms! There are so many I cannot keep up. At this point, half of the meetings sound less like real estate discussions and more like someone trying to reset the monthly office Wi-Fi password.

From a housing perspective, the market today is not frozen — it is cautious! Despite the headwinds, Newport Beach and Costa Mesa REALTORS® continue doing what REALTORS® do best: helping consumers navigate complicated decisions with professionalism, perspective, market knowledge, and our local expertise.

Housing affordability and inventory shortages have increasingly become national conversations receiving attention from policymakers, economists, and consumers alike. Discussions



surrounding institutional ownership of single-family homes, housing supply, taxation, affordability, and regulatory barriers continue dominating headlines while reinforcing how important housing policy has become not only for our industry, but for communities across the country.

Meanwhile, the real estate industry itself continues evolving rapidly.

The ongoing debates surrounding private listings, pre-marketing strategies, portal partnerships, seller choice, brokerage-controlled listing systems, and MLS transparency have intensified significantly over the past several months. Announcements involving Zillow Preview listings appearing on Realtor.com, brokerage-driven listing platforms, and expanding pre-market strategies all point toward an industry undergoing meaningful structural change. Somewhere, a consumer is wondering why their home is listed in five different places but somehow still impossible to find.

At the same time, many MLS leaders across the country continue emphasizing that the MLS remains essential infrastructure for cooperation, transparency, efficiency, and broad consumer access to inventory, that is provided. MLSs continue adapting and adding value to the marketplace. Even the leaders of our CRMLS have been called out publicly and it appears they may be listening! We may see some valuable changes in a few months in our own CRMLS.

Ultimately, the future of organized real estate will likely depend less on who “wins” the listing wars and more on which organizations continue providing the most trust, professionalism, transparency, efficiency, and value to both brokers and consumers.

Technology and AI are also rapidly reshaping our profession. From marketing and transaction workflows to customer communication and data analysis, artificial intelligence is already transforming how real estate business gets done. But even with all this innovation, one thing remains unchanged; consumers still value trusted relationships, strong negotiation skills, local expertise, and professional guidance when making some of the biggest financial decisions of their lives. Thankfully, AI still cannot host an open house, explain coastal commission rules, or politely answer the question, “What’s the absolute lowest the seller will take?” for the fourth time in ten minutes.

In many ways, today’s market increasingly favors REALTORS® who can combine technology with authenticity, communication, and storytelling. Consumers are not simply buying square footage, they are buying lifestyle, confidence, trust, and connection.

PRESIDENT'S MESSAGE *continued*



The Newport Beach Association of REALTORS® continues working to provide education, advocacy, networking, and professional resources that help our members navigate this rapidly evolving environment. And delivers all of this at a lower cost than other Associations in Orange County. Your membership matters more than ever and collectively benefits us all.

On behalf of the Newport Beach Association of REALTORS®, I would also like to extend a sincere thank you to Rebecca Anderson of Surterre Properties for volunteering to serve as NBAOR's Ambassador for the REALTORS® Relief Foundation's 25th Anniversary Campaign. As part of this nationwide effort, the REALTORS® Relief Foundation is working toward a goal of having at least one Ambassador representing every local board across the country to help promote awareness, encourage participation, and continue supporting families in times of need. You may be hearing from her soon!

I would also encourage our members to join us for NBAOR's upcoming Charity Poker Tournament on Wednesday, June 24, 2026 at Flemings Newport Beach, benefiting Childhelp OC. Whether you are an experienced poker player, casual card player, or simply looking for a fun networking event supporting a meaningful cause, we hope you will attend. Casino game tables will also be available for non-poker players, proving once again that REALTORS® are always willing to gamble a little... preferably for charity and not on interest rate predictions.

As always, thank you to our members, Board of Directors, committee leaders, volunteers, affiliates, and staff for your continued involvement and professionalism.

Wishing everyone a successful, productive, and hopefully at least somewhat relaxing start to summer. And if summer plans include taking a break from industry news for a few days, honestly, that may be the healthiest market strategy of all.

John Yasko



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CHARITY POKER TOURNAMENT

WEDNESDAY, JUNE 24, 2026

Flemings Newport Beach

455 Newport Center Dr, Newport Beach, CA 92660

4:00 PM CHECK-IN

4:30 PM PLAY STARTS

ENTRY: \$125

Re-Buys Available (unlimited until break)
Casino Game Tables available for non-poker players

PROCEEDS BENEFITTING



FEDERAL TAX ID: 95-2884608

REGISTRATION

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PAYMENT INFORMATION

Name on Card _____ Amount to Charge _____

Credit Card # (Circle Visa or MasterCard) _____

CVC _____ Expiration Date _____ Phone _____

Email _____

(PLEASE MAKE CHECKS PAYABLE TO "NBAOR")

NEWPORT BEACH ASSOCIATION OF REALTORS®

CHARITY POKER TOURNAMENT

WEDNESDAY, JUNE 24, 2026

Flemings Newport Beach

455 Newport Center Dr, Newport Beach, CA 92660

PROCEEDS TO BENEFIT: FEDERAL TAX ID 95-2884608

SPONSORSHIP OPPORTUNITIES:

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MARINERS ESCROW

Since 1982

Presents

CHARITY POKER TOURNAMENT

WEDNESDAY, JUNE 24, 2026

Flemings Newport Beach

455 Newport Center Dr, Newport Beach, CA 92660

BENEFITTING



FEDERAL TAX ID 95-2884608

Childhelp is committed to giving every child a chance at a better life through prevention programs, treatment services, and education focused on ending child abuse.

* YES, I wish to donate a Silent Auction item for the 20256 Charity Poker Tournament to be held on Wednesday, June 24, 2026. I understand that my donation must be received at the Association Office no later than June 10, 2026 .

I plan to give the following:

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Value:\$ _____

Please recognize my company as:

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Address: _____

Email Address: _____

**All donations must be received no later than June 10, 2026
in order to be recognized in the program.
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LEARN ALL ABOUT

- WHY OLDER HOMEOWNERS ARE SELLING**
What are the specific cash flow, tax, and estate issues older homeowners are concerned with?
- LOANS, REVERSE MTGS, FINANCING**
Learn advanced strategies for reverse mortgage refinances and reverse mortgage for purchases, and how higher interest rates cause issues for our retired homeowners.
- HEIRS, TRUSTS, AND TITLE ISSUES**
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SPEAKER

RYAN KLEIS

Reverse Mortgage Educator

JULY 1

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Raymond Lee- Paramount Realty

Morgan Evans- Morgan Evans, Broker

REALTOR® MEMBERSHIP

Taylor Thorne- Original Services, Inc.

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20 Years!

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Jesi Pearce • Lisa Schulz • Jena Bondugji

1 Year!

Ali Tavakoli • Makenna Miller



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	MEMBER RATES	NON-MEMBER RATES
Half Day (4 Hours)	\$400	\$500
Full Day (8 Hours)	\$600	\$750
Deposit	\$200	\$200



NEWPORT BEACH ASSOCIATION OF REALTORS®

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

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ORANGE COUNTY DECLARATION FOR ANTI-PRICE GOUGING FOR RENTALS IS IN EFFECT UNTIL 6/22/2026

Governor Gavin Newsom issued a state of emergency proclamation for Orange County as the state continues to assist in local response efforts following a hazardous chemical incident at an aerospace facility that resulted in the evacuation of tens of thousands of residents from the surrounding area. This declaration triggered California's anti-price-gouging law (PC 396 (e)) and limiting rent increases to no more than 10% above pre-emergency levels. This will expire on June 22, 2026, unless extended. Anyone convicted of violating the statewide anti-price-gouging law can face a year in county jail, a fine of up to \$10,000, or both, as well as civil penalties. The emergency proclamation for Orange County can be found [here](#).

[Learn More About OC State of Emergency.](#)

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Monthly Market Report

Orange County

April 2026

Existing SFR Home Sales

1,092

% Change from Last Year **+0.5%**

Existing SFR Median Price

\$1.46M

from Last Year **+3.3%**

Active Listings

2,154

% Change from Last Year **-12.1%**

Market Competition

Median Days on Market **22**

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

% of Active Listings with Reduced Prices **31.0%**



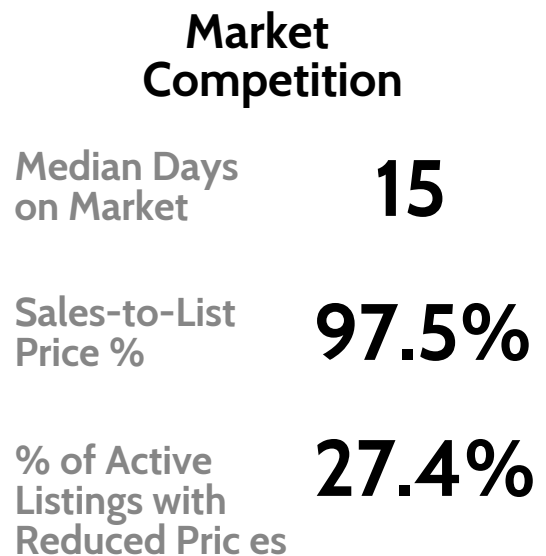
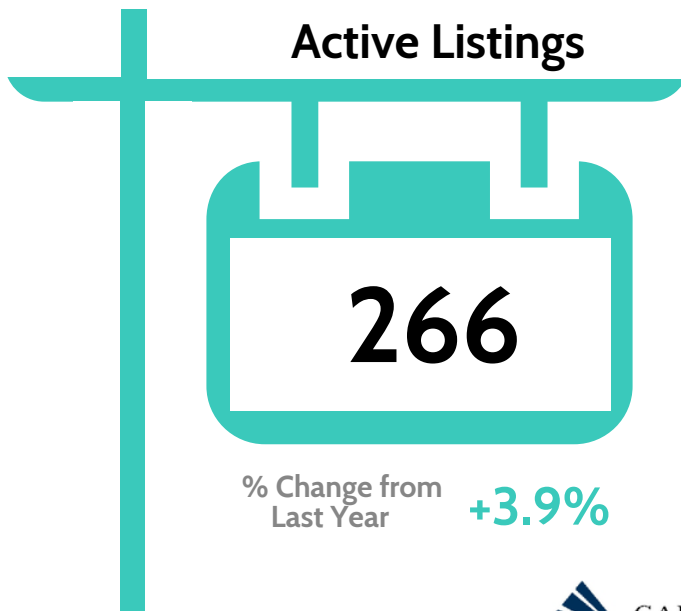
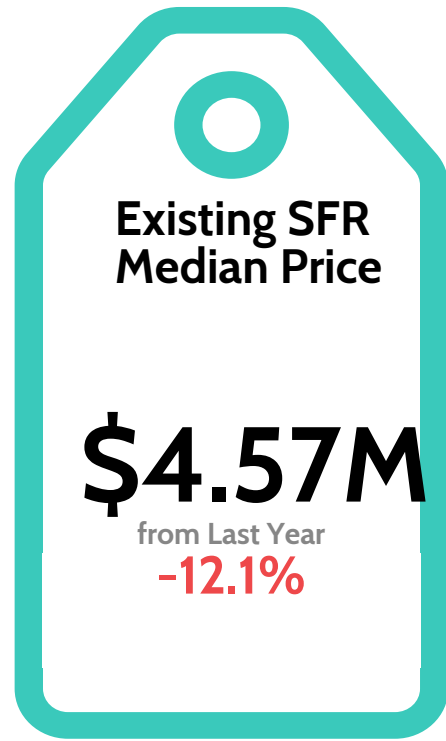
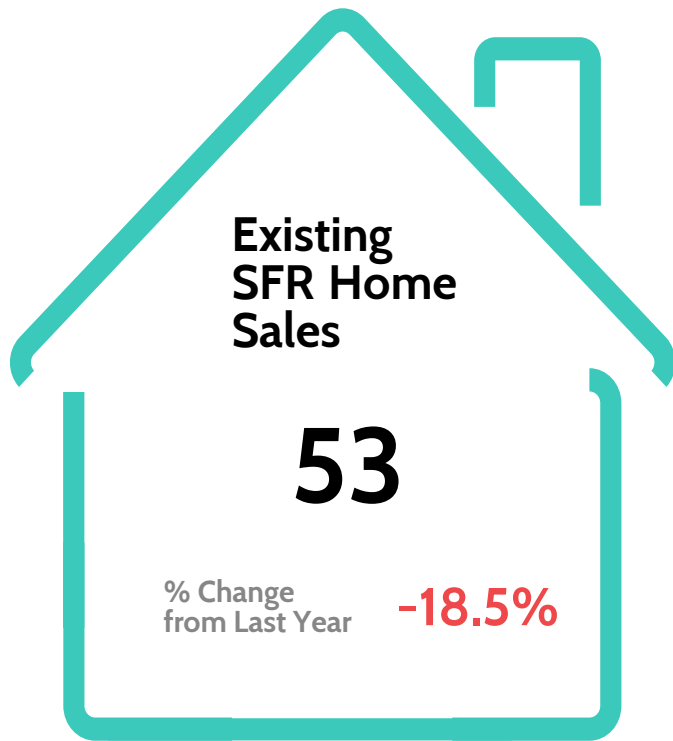
CALIFORNIA
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Monthly Market Report

Newport Beach, California

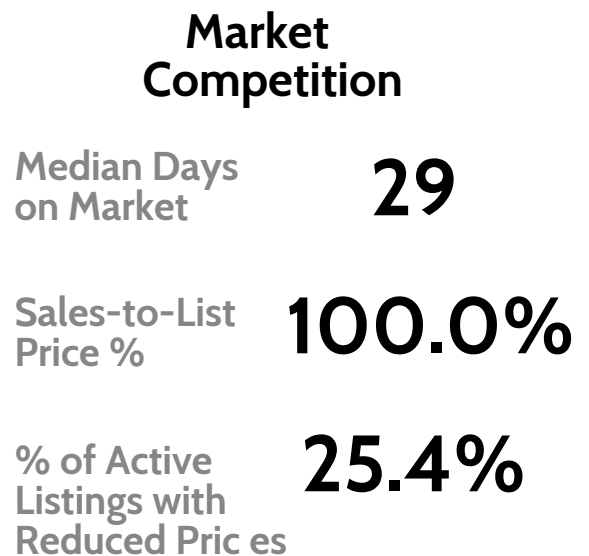
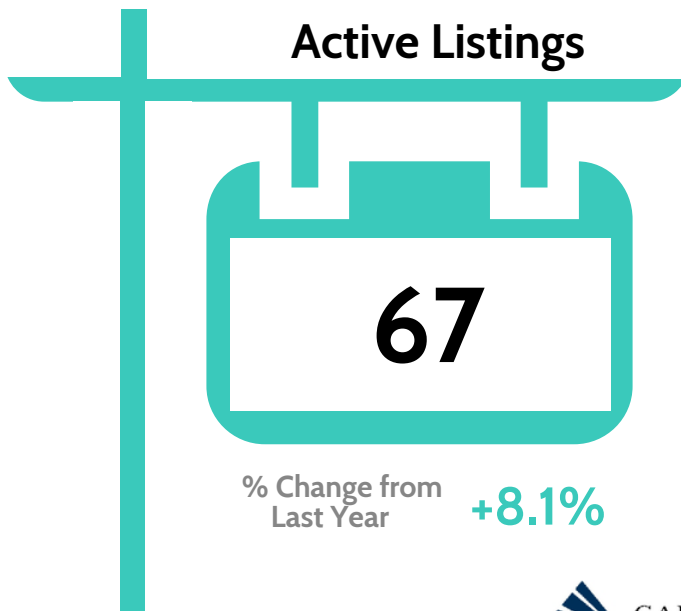
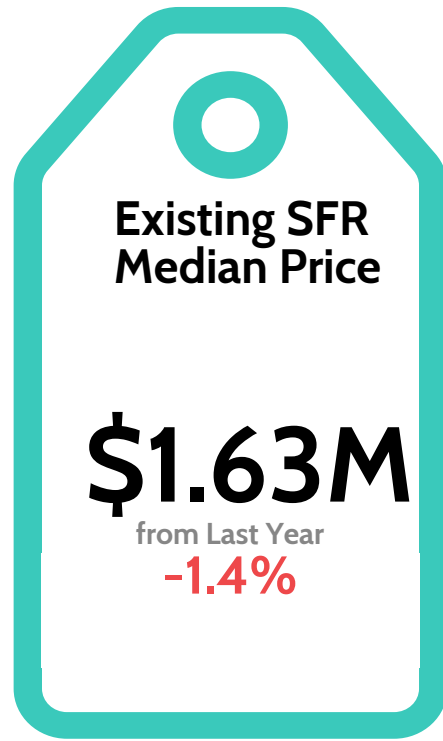
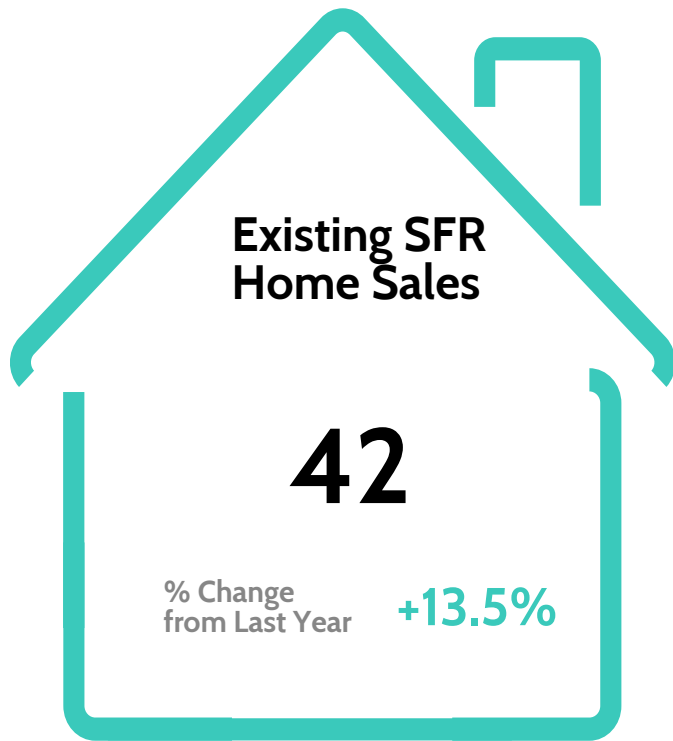
April 2026



Monthly Market Report

Costa Mesa, California

April 2026





BRANDI RIVERA

SENIOR ESCROW OFFICER

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Irvine, CA 92612

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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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PHISHING SCAMS ON THE RISE

Real estate professionals are being warned about a growing phishing scam targeting listing inquiries sent through popular real estate platforms. According to industry alerts and advisories from the California Department of Real Estate (DRE), scammers are sending messages that appear to reference legitimate property listings and often follow up with requests to schedule Zoom calls. Reports from multiple markets indicate the Zoom links may install malware capable of monitoring email conversations between agents, clients, lenders, and title companies in an effort to intercept wiring instructions and redirect funds.

The DRE also warned that scammers are impersonating licensed real estate professionals through fake websites, email addresses, social media accounts, and online listings using publicly available information such as license numbers, photos, and agent names to appear legitimate. Common warning signs include repeated inquiries across multiple listings, vague or generic messages, unsolicited video meeting requests, unexpected MFA prompts, disappearing emails, unfamiliar inbox rules, and sudden changes to wiring instructions.

Additionally, C.A.R. is offering a Cybercrime & Transaction Fraud Certification course designed to help members identify scams, prevent fraud, and better protect clients during transactions. The four-hour certification course is available free to C.A.R. members using discount code FREECERT through C.A.R. Education.

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RIDE THE BALBOA PENINSULA TROLLEY

The Balboa Peninsula Trolley is a free service to get you easily moving around the Peninsula without having to pay for parking or worry about finding a place to park. The trolley operates each Saturday and Sunday during the summer beginning on May 23, 2026 and ending on September 7, 2026. The trolley will also be in service during the summer's major holidays:

- Memorial Day on Monday, May 25
- Independence Day on Friday, July 3 (Observed Holiday)
- Independence Day on Saturday, July 4
- Labor Day on Monday, September 7.

The trolley's regular hours of operation are on Saturday and Sunday from 10 a.m. until 9:30 p.m.

General Trolley Information

The trolley route is the same as prior years. Stop number one is located next to the Avon Street Parking Lot, which is near the intersection of Tustin Avenue and Avon Street within Mariners' Mile.

TIP: Download the "ParkMobile" app and set up your profile (vehicle make, model and license plate) in advance. Then, enter the promotion code in ParkMobile's Settings, before you pay for parking or enter the code "TROLLEY26" at the kiosks to receive free parking. Note: This parking code is valid in the Avon Street Parking Lot only.

From there, you can ride for free along the route down the Peninsula and get off and back on at any of the 22-marked trolley stops - all for free.

There will be a total of four trolleys operating each day. An additional trolley will be added into the rotation on the holidays. It is estimated that a trolley will be at each stop every 15 minutes; however, service may be delayed during periods of heavy traffic.

RIDE THE BALBOA PENINSULA TROLLEY

What Can I Bring on the Trolley?

- Bicycles - There is a rack on the front of the trolley that can accommodate two bicycles.
- Surfboards - Riders will have to hold their surfboard in an upright position and the surfboard has to be no longer than six feet.
- Beach gear - There is space for you to load up all your beach gear.
- Luggage - Travelers to Catalina Island can bring their luggage on board.

Trolley Tracker

Riders can view real-time trolley locations online at PeninsulaTrolley.TripShot.com or on the mobile app. To download the app, search for "TripShot" in the app store and download. Once installed, search for "City of Newport Beach (Balboa Peninsula Trolley)" from the list of agencies and get ready to ride.

FREE

SATURDAY & SUNDAY MEMORIAL DAY, JULY 8TH AND LABOR DAY, SEPTEMBER 5TH 10 AM TO 9:00 PM

TROLLEY STOP
BIKE ROUTE
FREE TROLLEY PARKING
PUBLIC PARKING

TROLLEYS ARRIVE AT STOPS EVERY 15 MINUTES

DOWNLOAD THE APP
Download the TripShot app and search for "Newport Beach" from the list of agencies.

BALBOA PENINSULA TROLLEY

PENINSULATROLLEY.COM
Access the website or download the app for a real-time trolley location.

STOP LIST:

- 1 AVON & FREE TROLLEY PARKING
- 2 NEWPORT & SHORT
- 3 NEWPORT & 30TH
- 4 BALBOA & 30TH
- 5 MARINA PIKE
- 6 BALBOA & 15TH
- 7 BALBOA & 17TH
- 8 BALBOA & 8TH
- 9 BALBOA & ISLAND
- 10 BALBOA & ADAMS
- 11 BALBOA PIER
- 12 BALBOA & ADAMS
- 13 BALBOA LIBRARY
- 14 BALBOA & 6TH
- 15 BALBOA & 12TH
- 16 BALBOA & 15TH
- 17 MARINA PIKE
- 18 BALBOA & 30TH
- 19 NEWPORT & 30TH
- 20 LAFFETTE & 12ND
- 21 VIA 1000 & VIA UPRIDE
- 22 AVON & BERRIDGE

SavvyCard® for Real Estate Agents

Take Your Leads Back from the Portals

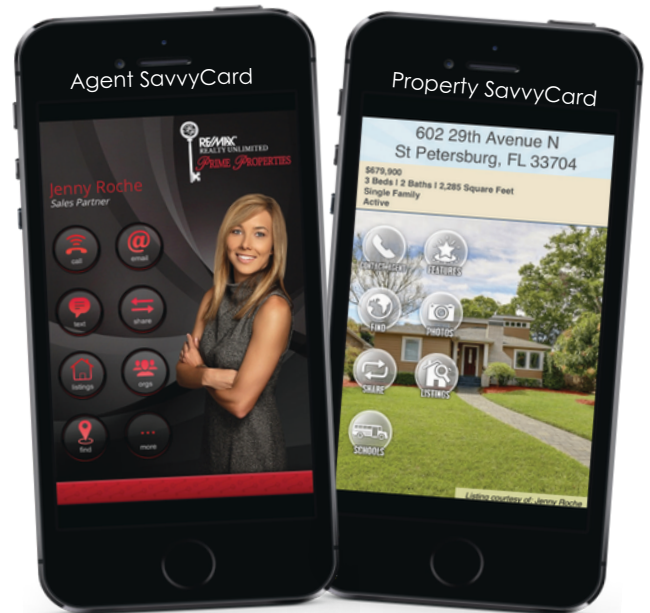
SavvyCard® for Real Estate uses MLS data to automatically create and maintain lead generating SavvyCards for you and your listings. Use SavvyCards to generate leads online through Social Media and through your customer's friends and family, quickly and inexpensively!

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."

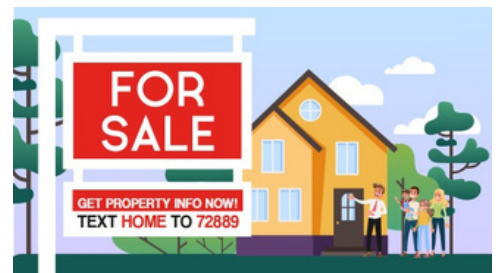
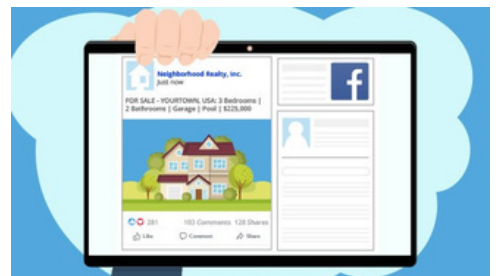
(Continued on back)

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





MAYOR AND CITY MANAGER TAKE PART IN TWO LEADERSHIP TOMORROW PANELS ON GOVERNMENT

Mayor John Stephens and City Manager Cecilia Gallardo-Daly recently participated in two Leadership Tomorrow workshops at the Norma Hertzog Community Center.

Mayor Stephens took part in a panel where local elected officials shared insights on the challenges and rewards of public service and leadership.

Moderated by Newport Beach Chamber of Commerce President Steve Rosansky, the panel gave Leadership Tomorrow participants the opportunity to hear directly from regional leaders on civic engagement, local government, and community leadership.

Mayor Stephens joined Mayor Larry Agran of Irvine, Mayor Pro Tem Noah Blom of Newport Beach, and Mayor Austin Lumbard of Tustin for the discussion and Q&A session.

City Manager Gallardo-Daly also took part in a City Manager Panel moderated by Al Zelinka, Director with Baker Tilly's public sector advisory practice.

She was joined by Irvine Assistant City Manager Pete Carmichael, Newport Beach City Manager Seimone Jurjis and Tustin City Manager Aldo Schindler.

For more information [visit Leadership Tomorrow here.](#)



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



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(949) 722-2300

SOLO(k) SOLUTION



Newport Beach Association of Realtors RETIREMENT PLAN EXCHANGE[®]

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[®]

Fiduciary-Plus[®]



TRANSAMERICA[®]

INVESTMENT STRUCTURE - FIDUCIARY-PLUS

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



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866-315-1463

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Retirement Plan Exchange® 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.

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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® 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.

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June

CALENDAR OF EVENTS

2026

Sun

Mon

Tue

Wed

Thu

Fri

Sat

1

Affiliate Meeting
1:00pm

2

Getting Started with zipForms - Basics
10:00 AM

Maximize Rents, Value, and Minimize Expenses
9:30 AM

3

Your Guide to the California RPA and Related Forms 9:00 AM

CCRE Workshop Series: Local Government & Community Partnering for Success 2:00PM

4

NAR's Military Relocation Professional Certification
9:00 AM

Explore Advanced Tools in zipForms
1:00PM

5

6

7

8

9

NAR's Pricing Strategy Advisor Certification
9:00AM

Digital Signatures inside zipForms & Transact 11:00AM

10

Supra eKey Basic & Professional Training
8:00AM

CCRE Workshop Series: Local Government & Community Partnering for Success 2:00PM

11

Boost Efficiency and Productivity in zipForms 1:00PM

12

45 Hour License Renewal Course
9:00am

13

14

15

Mastering Real Estate Representation

16

NAR's How Partitions Work and Why Should Be Working on These Transactions 9:00AM

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

17

Growing Green: Environmental Awareness and Your Real Estate Practice

18

19

20

21

22

Real Estate Kickstarter

23

Real World Real Estate: From License to Real Life 10:00 AM

24

2026 Charity Poker Tournament

25

26

45 Hour License Renewal Course
9:00am

27

28

29

CRMLS Matrix: Creating a CMA 9:00AM

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