

STAFF REPORT

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**SUBJECT: RESOLUTION TO AWARD A REAL ESTATE BROKER SERVICES CONTRACT TO COLDWELL BANKER AND AUTHORIZE THE EXECUTION OF AN AGREEMENT FOR PROFESSIONAL SERVICES**

Board of Directors of Coastside Fire Protection District:

**Recommendation:**

It is recommended that the Fire Board adopt the attached resolution awarding a real estate broker services contract to Coldwell Banker and authorize the Board President to execute the contract. (Attachment 1)

**Background and Discussion:**

Earlier this summer, the Board directed issuance of a Request for Proposals (RFP) for Real Estate Broker Services. (Attachment 2) The Scope of Services in the RFP was defined as:

- Develop strategies for the sale of two (2) District owned properties,
- Perform market analyses,
- Coordinate real estate transaction closings, and
- Handle all other customary activities and services associated with real estate transactions.

The attached three (3) responses were received on June 18, 2018 from: Coldwell Banker proposing a 6% commission; Starboard Commercial Real Estate proposing a 6% commission/\$225/hr. for meetings; and Tranzon Asset Strategies proposing a 4.75% commission. (Attachment 3) The responses were reviewed by Directors Cockrell and Stockman, acting in their capacity as the Land and Structures Subcommittee.

Based upon its presence on the Coast and its years of local experience, the Subcommittee recommends that the Fire Board accept the proposal submitted by Jan Gray and Barbara La Vey on behalf of Coldwell Banker and authorize a contract with Coldwell Banker to perform the above-referenced services.

**Fiscal Impact**



Coldwell Banker now proposes a 5% commission fee for its services.

**Conclusion**

It is recommended that the Fire Board adopt the attached resolution awarding a real estate broker services contract to Coldwell Banker and authorize the Board President to execute the contract with Coldwell Banker.

**Attachments:**

1. Resolution
2. Request for Proposals for Real Estate Broker Services
3. Responses by:
  - a. Coldwell Banker
  - b. Starboard Commercial Real Estate
  - c. Tranzon Asset Strategies



**ATTACHMENT 1**

**RESOLUTION**



**RESOLUTION NO. 2018-28**

**A RESOLUTION TO AWARD THE REAL ESTATE BROKER SERVICES CONTRACT TO COLDWELL BANKER; AND AUTHORIZE THE EXECUTION OF THE AGREEMENT FOR PROFESSIONAL SERVICES**

WHEREAS, the District issued a Request for Proposals for Real Estate Broker Services and on June 18, 2018, three proposals were received; and

WHEREAS, the Land and Structures Subcommittee reviewed the proposals received from Coldwell Banker, Starboard Commercial Real Estate, and Tranzon Asset Strategies; and

WHEREAS, the Land and Structures Subcommittee recommends that the Board award a contract to Coldwell Banker due to its presence on the Coast and its years of local experience; and

WHEREAS, the Board, having reviewed the three proposals, wishes to implement the recommendation of the Land and Structures Subcommittee.

NOW, THEREFORE, BE IT RESOLVED, by the Fire Board of the Coastsid Fire Protection District that:

1. A real estate broker services contract to Coldwell Banker is hereby approved;
2. The Fire Board directs that an agreement providing for 5% commission be negotiated in a form acceptable to the District's Attorney and the President hereinafter be authorized to execute the agreement on behalf of the District.

PASSED AND ADOPTED as a Resolution of the Coastsid Fire Protection District at the regular meeting held on the 25<sup>th</sup> day of July 2018, by the following vote:

AYES:  
NOES:  
ABSENT:  
ABSTAIN:

\_\_\_\_\_  
Gary Burke, Board President

ATTEST:

\_\_\_\_\_  
Assistant Chief Paul Cole, District Secretary





## **RFP FOR REAL ESTATE BROKER SERVICES**

Coastside Fire Protection District seeks a real estate broker/firm to provide services to the District. It is the intent of this RFP to have the successful broker/firm enter in to a Professional Services Contract with the District to supply real estate services.

Sealed responses should be submitted to Chief Paul Cole, by June 18, 2018; clearly marked on the outside "Proposal – Real Estate Broker Services".

All questions should be sent to Paul Cole, Chief, 1191 Main Street, Half Moon Bay, CA 94019 or e-mail at pcole@coastsidefire.org. Question deadline will be June 15, 2018.

### **A. SCOPE OF SERVICES**

The successful broker/firm shall agree to contract with the District to provide the following:

- Develop strategies for the sale of two (2) District owned properties,
- Perform market analyses,
- Coordinate real estate transaction closings, and
- Handle all other customary activities and services associated with real estate transactions.

Services may include consultation with District staff and the Board relating to the sale of real property owned by the District. Presentations at public meetings may be required.

### **B. BROKER'S QUALIFICATIONS**

Respondents to this RFP shall have the following qualifications:

- Must be licensed and in good standing with the State of California.
- Must have an excellent reputation in the real estate community.
- Must be knowledgeable in the local real estate market and have experience with small and large commercial properties.
- Must be knowledgeable in the use of all public real estate records.
- Must be knowledgeable in the purchase and/or sale of publicly owned real estate.

### **C. INSURANCE REQUIREMENTS**

For proposal purposes, proposers must submit copies of certificates of insurance for general liability and workers' compensation. The successful contractor must provide original certificates prior to commencing services.

### **D. FEE SCHEDULE**

The proposed fee schedule shall be included in the proposal.



**E. TERM OF CONTRACT**

The contract period for the successful broker/firm will be from date of award until either party choose to discontinue the contract. The contract may be terminated by either party with 60 (sixty) days prior notice.

**F. EVALUATION AND AWARD PROCESS**

Issuance of this RFP and receipt of proposals does not commit the District to award a contract. The District reserves the right to postpone receipt date, to accept or reject any or all proposals received in response to this RFP, or to negotiate with any of the brokers/firms submitting an RFP, or to cancel all or part of this RFP.

**G. ORAL PRESENTATION/INTERVIEWS**

Brokers/firms submitting a proposal in response to this RFP may be required to give an oral presentation of their proposal. Additional technical and/or cost information may be requested for clarification purposes, but in no way will change the original proposal submitted. Interviews are optional and may or may not be conducted.

**H. SELECTION CRITERIA**

1. Knowledge of local real estate market in San Mateo County with particular emphasis on properties on the San Mateo Coast.
2. Global reach for marketing the property.
3. Commercial real estate experience, qualifications and references.
4. Experience in purchase/sale of publicly owned property, including marketing of property declared to be surplus.
5. Proven commercial real estate track record.
6. Ability of the contractor(s) to meet or exceed the requirements defined in the RFP.
7. Local reputation.
8. Fee schedule.
9. Completeness of response to RFP as outlined in this solicitation.

**I. RFP SUBMITTAL REQUIREMENTS**

By submitting a proposal, you represent that you have (1) thoroughly examined and become familiar with the scope of services outlined in this RFP and (2) are capable of performing quality work to achieve the District's objectives.

**The following information must accompany your proposal:**

1. List years in business, previous names of firm, if any.
2. Description of firm including size of firm, location, number and nature of the professional staff to be assigned to District; staff experience and training, including a brief resume for each key person listed.



3. Description of experience (minimum five years previous experience with proven effectiveness) broker/firm has in pertinent real estate experience.
4. Experience in assisting similar sized entities, including any and all services for government agencies.
5. List of at least three references, where and when broker/firm provided services to these references. Please provide names and telephone numbers of contact persons for each reference.
6. Additional services offered by broker/firm.
7. Listing of current litigation, outstanding judgments and liens.
8. Fee schedule:
  - State commission rate for listing and selling of properties
  - State any other costs the District may anticipate relating to the real estate services to be provided.





June 18, 2018

248 Main Street, Suite 200  
Half Moon Bay, CA 94019  
P 650.726.1100  
F 650.726.8676

Chief Paul Cole  
Coastside County Fire Protection District  
1191 Main Street  
Half Moon Bay, CA 94019

Dear Chief Cole,

RE: Request for Proposal  
Real Estate Broker Services

We are pleased to be given the opportunity to respond to your request for real estate broker services. We have attached our resumes and will use your RFP as an outline to respond to the balance of the list.

We have previously worked with the San Mateo County Harbor District to sell two of their surplus properties. The first, Burnham Strip was purchased by the Granada Sanitary District. The second was the Post Office Lot sold by SMCHD to Cal-Fire for the new station in El Granada.

The fee schedule is an industry standard of six percent (6%).

The term of contract for small agency-owned properties is determined by negotiations after the appraisal has been received by Cal-Fire which will contain a Fair Market Value that coincides with current market conditions for our area.

We will be prepared to present ourselves to the Board of Directors for an oral interview, and will answer any questions, or will clarify anything contained in our RFP.

We work for Coldwell Banker, a company that began in San Francisco after the 1908 earthquake. We have a world-wide reach and extensive local knowledge. We have lived on the San Mateo County Coast since 1968; Jan's been in real estate for 44 years, and Barbara for 18 years. Our local office has 32 agents with experienced support staff of four. We have no outstanding litigation at this time.

Listed below are four references:

**Raymond and Emily Hoche-Mong** (650) 728-5451  
A client since 1983, owners of the  
Goose & Turrets Bed & Breakfast in  
Montara

**Deborah Penrose** (650) 726-4358  
Known for many years, she was a client of  
When we had her home in Montara listed,  
Currently mayor of Half Moon Bay

**Jeanine Fish** (650) 799-5954  
Formerly an independent appraiser, now  
County Manager for Appraisal Department for  
United American Bank

**Peter Grenell**  
Retired general manager for San Mateo County  
Harbor District, we worked with him on the sale  
of two surplus properties. He has retired, no phone  
contact number

With 44 and 18 years, respectively, of local real estate experience, we enjoy a good reputation with local business leaders, other real estate agents and title/escrow people. We are conversant with zoning and land use regulations on the San Mateo County Coast.

We are ready, willing and able to work with Cal-Fire in the sale of the two surplus properties. Enclosed are the requested licenses and copies of insurance certificates.

Sincerely,



Jan Gray

Barbara LaVey



# BARBARA LAVEY

## EDUCATION

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2006	Senior Real Estate Specialist – SRES	Half Moon Bay, California
2005	Graduate Realtor Institute-GRI	San Mateo, California
2005	College of San Mateo <i>Legal Aspects of Real Estate</i>	San Mateo, California
1993-1995	California State University <i>Bachelor's Degree – Human Development</i>	Hayward, California
1989-1993	College of San Mateo <i>Associate Degree – Liberal Arts</i>	San Mateo, California

## PROFESSIONAL EXPERIENCE

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- February 2002 Coldwell Banker Half Moon Bay, California  
*Realtor*
- Specializing in listing and selling homes in the all towns along the coast with an emphasis on technology to meet the demands of today's buyer's and seller's expectations, i.e. managing personal website, online disclosures, emails and advertising

## ADDITIONAL PROFESSIONAL ACTIVITIES

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- Chair of San Mateo County Association of Realtors (SAMCAR) Coastside Legislative Committee
- Advocating private property rights by attending City Council Meetings, &
- Board of Supervisor's Hearings and monitoring the ever changing politics on the local level

## PROFESSIONAL MEMBERSHIPS

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- Half Moon Bay Chamber of Commerce
- San Mateo County Association of Realtors (SAMCAR)
- California Association of Realtors (CAR) DRE # 01361161
- National Association of Realtors (NAR)



# JANET HILL GRAY

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

DRE # 00478786

## Background

California real estate salesperson 1974; broker's license 1979  
Sales manager Canyon Realty, Half Moon Bay, 1974-1976  
Partner/owner Canyon Realty 1976-1982  
Partner/owner Oceanshore Brokerage 1982-1992

## Education

Kansas State College, Liberal Arts/Journalism  
Skyline College, Collage of San Mateo, Canada College, College of Notre Dame  
General Education and various real estate and appraisal classes  
Graduate Realtors® Institute – GRI  
Certified Real Estate Broker/Manager – CRB  
Certified Residential Sales Specialist – CRS  
Seniors Real Estate Specialist – SRES

## Community Service

President Half Moon Bay Coastside Chamber of Commerce 1989  
President Toastmasters of Pacifica-Half Moon Bay Board of Realtors® -- 1988  
President Pacifica-Half Moon Bay Association of Realtors® -- 1994  
State Director California Association of Realtors® 1995  
Vice Chair North, Consumer Protection Committee – 1995  
Director at Large California Association of Realtors® -- 1996 and 1997  
Board of Directors San Mateo County Association of Realtors® 1994-1998 & 2002-2005  
Board of Directors Half Moon Bay Open Space Trust (HOST)  
Member Coastside Legislative Committee  
Member Capital Campaign Committee for new Senior Center in HMB  
Member, General Plan Advisory Committee, City of Half Moon Bay  
Villages of the Coastside, Committee Member

## Special Awards

*Circle of Excellence* for top producers – Pacifica-Half Moon Bay Board of Realtors®  
*Sales Achievement Milestone Awards* – San Mateo County Association of Realtors®  
*“Realtor® of the Year 1998”* San Mateo County Association of Realtors  
*Coldwell Banker Annual International Sales Awards: 2000 to 2016*  
*“Best of the Coastside 2003”* voted by the readers of the *“Half Moon Bay Review”*  
*Longevity Award, Chamber of Commerce – 40 years in Service 2013*  
*Realtor Emeritus (1974-2014) National Association of Realtors*  
*International President's Circle Sales Award, 2010 through 2016*  
*Top Team, Coldwell Banker Half Moon Bay 2015 and 2016*

***Resident of San Mateo County Coastside since 1968***





# CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)  
12/05/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Aon Risk Services Northeast, Inc. Morristown NJ Office 44 Whippany Road, Suite 220 Morristown NJ 07960 USA	<b>CONTACT NAME:</b> PHONE (A/C. No. Ext): (866) 283-7122      FAX (A/C. No.): 800-363-0105		
	<b>E-MAIL ADDRESS:</b>		
<b>INSURED</b> Realogy Holdings Corp. NRT, LLC 175 Park Avenue Madison NJ 07940 USA	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	INSURER A: National Union Fire Ins Co of Pittsburgh		19445
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
INSURER F:			

Holder Identifier :

**COVERAGES**      **CERTIFICATE NUMBER: 570069412973**      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.      **Limits shown are as requested**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	
	<b>AUTOMOBILE LIABILITY</b>  <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION						EACH OCCURRENCE AGGREGATE	
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT E.L. DISEASE-EA EMPLOYEE E.L. DISEASE-POLICY LIMIT	
A	E&O-MPL-Primary			038403961 Claims Made Policy SIR applies per policy terms & conditions	12/17/2017	12/17/2018	Each wrongful Act Aggregate    \$5,000,000 SIR (each claim)    \$1,000,000	

Certificate No : 570069412973

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Proof of E&O Insurance for Coldwell Banker / NRT West, Inc. The above coverage applies to all real estate agents affiliated with Coldwell Banker Residential Brokerage / NRT West, Inc. and REO related services.

<b>CERTIFICATE HOLDER</b>  NRT West, Inc. dba Coldwell Banker Attn: Dan Mueller-Legal 1855 Gateway Blvd., #670 Concord, CA 94520 USA	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  <i>Aon Risk Services Northeast, Inc.</i>
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# CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)  
07/25/2017

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> Aon Risk Services Northeast, Inc. Morristown NJ Office 44 Whippany Road, Suite 220 Morristown NJ 07960 USA	<b>CONTACT NAME:</b> PHONE (A/C. No. Ext): (866) 283-7122      FAX (A/C. No.): (800) 363-0105 E-MAIL ADDRESS:														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">INSURER(S) AFFORDING COVERAGE</th> <th style="width: 20%;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Continental Casualty Company</td> <td style="text-align: center;">20443</td> </tr> <tr> <td>INSURER B: American Casualty Co. of Reading PA</td> <td style="text-align: center;">20427</td> </tr> <tr> <td>INSURER C: Transportation Insurance Co.</td> <td style="text-align: center;">20494</td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Continental Casualty Company	20443	INSURER B: American Casualty Co. of Reading PA	20427	INSURER C: Transportation Insurance Co.	20494	INSURER D:		INSURER E:		INSURER F:	
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INSURER E:															
INSURER F:															
<b>INSURED</b> Realogy Holdings Corp. NRT, LLC 175 Park Avenue Madison NJ 07940 USA															

Holder Identifier :

**COVERAGES      CERTIFICATE NUMBER: 570067693387      REVISION NUMBER:**

**THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.      Limits shown are as requested**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			GL4014102958	08/01/2017	08/01/2018	EACH OCCURRENCE      \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence)      \$1,000,000 MED EXP (Any one person)      \$10,000 PERSONAL & ADV INJURY      \$1,000,000 GENERAL AGGREGATE      \$2,000,000 PRODUCTS - COMP/OP AGG      \$2,000,000
	AUTOMOBILE LIABILITY  <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION						EACH OCCURRENCE AGGREGATE
B	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY <input type="checkbox"/> ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	WC4014102779 California WC4014102815 All other States	08/01/2017	08/01/2018	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT      \$1,000,000 E.L. DISEASE-EA EMPLOYEE      \$1,000,000 E.L. DISEASE-POLICY LIMIT      \$1,000,000

Certificate No : 570067693387

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 General Liability and Workers' Compensation coverage applies to all NRT Real Estate Agents in California.

<b>CERTIFICATE HOLDER</b>  NRT West, Inc. DBA Coldwell Banker Attn: Branch Manager 1855 Gateway Blvd., Suite 670 Concord CA 94520 USA	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  
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# ADDITIONAL REMARKS SCHEDULE

AGENCY Aon Risk Services Northeast, Inc.		NAMED INSURED Realogy Holdings Corp.	
POLICY NUMBER See Certificate Number: 570067693387			
CARRIER See Certificate Number: 570067693387	NAIC CODE	EFFECTIVE DATE:	

**ADDITIONAL REMARKS**

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER	
INSURER	
INSURER	
INSURER	

**ADDITIONAL POLICIES** If a policy below does not include limit information, refer to the corresponding policy on the ACORD certificate form for policy limits.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YYYY)	POLICY EXPIRATION DATE (MM/DD/YYYY)	LIMITS
	WORKERS COMPENSATION						
C		N/A		WC4014102734 AZ, OR, WI	08/01/2017	08/01/2018	





# State of California

Bureau of Real Estate

## Real Estate Salesperson License

Barbara Lynn LaVey

**BROKER AFFILIATION**

NRT WEST, INC.  
1855 GATEWAY BLVD STE 750  
CONCORD, CA 94520

A handwritten signature in black ink, appearing to read 'T. J. ...', positioned above the title of the Real Estate Commissioner.

*Real Estate Commissioner*

*Identification Number:* 01361161

*Issued:* December 12, 2014

*Expires:* December 11, 2018



# State of California

Bureau of Real Estate

## Real Estate Broker License

Janet Hill Gray

**MAIN OFFICE ADDRESS**

248 MAIN ST #200  
HALF MOON BAY, CA 94019

A handwritten signature in black ink, appearing to read "Janet Hill Gray".

*Real Estate Commissioner*

*Identification Number:* 00478786

*Issued:* September 02, 2016

*Expires:* September 01, 2020





## Proposal for Real Estate Broker Services for Coastside Fire Protection District.

Chief Paul Cole  
1191 Main Street  
Half Moon Bay, CA 94019  
pcole@coastsidefire.org

### **Regarding RFP for Real Estate Broker Services**

#### **Broker/Firm: Starboard Commercial Real Estate**

List years in Business, previous names of firm, if any.

Years in Business = 27 years

Partners Previously members with TRI Commercial

**Frank Vella** will be the primary Broker assigned to this project.

Frank has worked with commercial and residential properties along the coast since 1991 and has been a valued member and senior Broker with Starboard Commercial Real Estate since 1997. Frank has extensive experience with commercial leasing and sales and is well versed with the following: The American Disabilities Act, environmental/contamination issues, and water/sewage issues along the coast. Frank was the top producing agent for Starboard for the years 2001, 2003, 2004, 2005, and 2008.

Frank has recently worked with the Federal Aviation Administration. Helped the FAA relocate to a warehouse/office space in South San Francisco.

Frank has experience with Bank and Lending institutions, Small business Loans (SBA lending), personal financing and foreclosure sales.

Frank is a coastal resident and has been very involved with local civic issues including City, County and State issues in both San Mateo and San Francisco Counties. Currently Frank is a Pacifica Government affairs Vice Chair with the San Mateo County Association of Realtors and is running to be a Government Affairs Committee member for San Mateo County. Frank is also very involved with the Local Coastal Plan regarding the San Mateo County coast line. Frank has worked with both buyers and sellers of Commercial Land, Retail, Recreational, Industrial, Office Buildings, Leasing and Sales.

Frank is a Member of:

- St Peter Mens Club
  - Club Treasurer since 2011.
- San Mateo County Association of Realtors
  - Member since 1991
- National Association of Realtors
  - Member since 1991
- Pacifica Chamber of Commerce
- San Francisco Chamber of Commerce

## Description of firm:

### **Starboard Commercial Real Estate:**

- Main location is 44 Montgomery Street, San Francisco, CA 94104
- Size of Firm: 22 Agents
- Staff: Accountant, receptionist/office coordinator, marketing team on and off site, website development on and off site.
- Our staff is experienced working with various types of properties and clients. We deal with private individual(s), llc's, corporate structures, as well as government organizations. We are also affiliated with a nationwide network called The Commercial Network, TCN.

TCN, The Commercial Network, is a is an alliance of top independent brokerage firms serving more than 200 markets. We offer our clients the ability to work with a global leader while accessing the unique knowledge that only local offices can provide.

TCN provides support and brokerage firms in 24 countries, 200+ markets, 160+ affiliated offices, 5000+ professionals, 445,000,000+ square footage under management, 58.6 Billion+ in transactions.

## Services Include:

- Relocations
- Space Expansion and Consolidation
- Lease Renewal, Cancellation and Renegotiation
- Financial and Operational Analyses
- Market Evaluations and Sublease Marketing
- Strategic Planning and Needs Analysis
- Market Surveys and Analysis
- Lease Negotiations
- Site Selection
- Lease Analysis and Occupancy Administration
- Marketing
- Property Positioning
- Leasing Strategy

## **Some Recent TCN Transactions:**

### **Starboard Commercial Real Estate/TCN Worldwide in San Francisco Announces The Sale of 570 Market Street for \$14.5 Million**

*Member Deal Announcement: Rare Property Sold for \$14.5 Million in Downtown San Francisco's Financial District. The buyer was represented by Starboard Commercial Real Estate's Frank Chiu. Built in 1922, the narrow two-story building is situated in a unique spot north of Market and is currently home to a mix of retail and office tenants, including Daiso Japan, Creative Marketing Concepts, ABC Cleaners, Lucky Nails, Mercury Maintenance and Jack's Shoe Repair.*

### **Sitar Realty/TCN Worldwide in New Jersey Sells 27-Unit Monmouth County Apartment Building for \$2,200,000**

*Member Deal Announcement: Sitar Realty Company announced the recent sale of a 27-unit apartment building in Wall Township, New Jersey for \$2,200,000. Robert JanTausch, Senior Associate and Ronald Schrader Jr., Vice President, represented the seller, the original developer, and the unnamed buyer.*

### **Norris & Stevens/TCN Worldwide Brokers The Sale of Office/Retail Complex at Prominent Corner in Portland, Or for \$3,500,000**

*Member Deal Announcement: Norris & Stevens announced that EPC Holdings 929, LLC has purchased 2275 W. Burnside, Portland, Oregon for \$3,500,000. Todd VanDomelen, Vice President, Investment Properties, of Norris & Stevens, Inc., and Kevin Adatto, Partner, Capital Pacific, represented the Seller, 2275 W. Burnside, LLC.*



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**Unique Properties/TCN Worldwide in Denver Reports  
Advanced Property Services LLC Purchased 11149 Bradford  
Road in Littleton for \$7.63 million**

*Member Deal Announcement: Advanced Property Services LLC purchased 36,841 office/flex square feet on 3.02 acres at 11149 Bradford Road in Littleton for \$7.63 million from Lot 17A B1 KCBP LLC. Tim Finholm and Sam Leger represented the buyer.*

**Schuckman Realty/TCN Worldwide in Long Island  
Instrumental in Bringing Tesla Auto Supercharging Station to  
Islandia Shopping Center, Islandia NY**

*Member Deal Announcement: Schuckman Realty coordinated with Tesla Inc., Village of Islandia and the owners of the Islandia Shopping Center to bring a centrally located Tesla Auto Supercharging station to Long Island.*

**Starboard Commercial Real Estate covers the following markets:**

Berkeley, Campbell, Ceres/Modesto, Clear Creek, Cotati, Daly City, Fairfax, Fremont, Mill Valley, Mountain View, Oakland, Pacifica, Palo Alto, Los Altos, Rohnert Park, San Anselmo, San Bruno, San Francisco, Sausalito, Walnut Creek

**USA Markets (In conjunction with The Commercial Network)**

Atlanta, GA, Birmingham, AL, Chicago, IL, Cleveland, Oh, Dallas/Fort Worth, TX, Denver, CO, Detroit, Mi, Farmington, CT, Fort Lauderdale, FL, Harrisburg, PA, Houston, TX, Kansas City, MO Las Cruces, NM, Long Island, NY, Los Angeles, CA, Minneapolis, MN, New York, NY, Oklahoma City, OK, Omaha, NEA, Orange County, CA, Philadelphia, PA, Phoenix, AZ, Portland, OR, Reno, NV, Richardson, TX, San Rafael, CA Sherman Oaks, CA Tulsa, OK, Vienna, VAH, Washington, D.C. Wilkes-Barre, PA, Yorktown, VA

**International Markets:**

Bribane, Austraila, Clagary, Canada, Edmonton, Canada, Hong Kong, Mexico, Monterrey, Mexico, Montreal Canada, Ottawa, Canada, Milan Italy



**Some of the coastal properties, of which Frank Vella has represented for either the Buyer or Seller:**

**650 Cape Brenton Drive; (Park Pacifica Stables)**

- 122 Acres. 3 separate lots with three different zoning classifications. Property included an operating equestrian business.
- [http://sfhomelife.com/IDX/650-CAPE-BRETON-DR-Pacifica-CA-94044/7890417\\_REIL/0005607](http://sfhomelife.com/IDX/650-CAPE-BRETON-DR-Pacifica-CA-94044/7890417_REIL/0005607)

**711 & 731 Oceana Blvd, Pacifica**

- Two newly built 2500 square foot commercial buildings.
- Built by O'Brien homes s bare shell buildings, buyers had to finish each building to their specifications.
- Sold to a Veterinarian and to a Dental Professional.

**5550 Coast Highway, Pacifica**

- 22,000 square foot multi-tenant building.
- Originally purchased to house Fresh and Easy. Currently the property is occupied by Grocery Outlet and a restaurant.
- This property had an existing environmental issue that had to be dealt with. Frank worked with the sellers, buyers, county, city, coastal commission and environmental remediation company to see this issue resolved.
- This property also had issues that involved Cal Trans, the adjacent property owner, the coastal commission with parking access to the beach, and city/neighborhood issues, all of which Frank worked to help resolve.



### **59 Bill Drake Way, Pacifica (former Pacifica Tribune building)**

- 4,575 square foot building - 9,626 square foot lot
- Two units on one lot
- Private sale to a local business
- Family owned since the early 70's
- Currently is occupied by the new owners with two different businesses.

### **347 Harvard Avenue, Half Moon Bay (Princeton Harbor)**

- 10,500 square foot lot
- Commercial
- 3 contiguous lots with separate parcels
- Located in the Industrial – Marine district overlay

### **0 Stanford Avenue, Half Moon Bay (Princeton Harbor)**

- 9,605 square foot lot
- Commercial
- Located in the Industrial – Marine district overlay

### **1320 Adobe Drive, Pacifica**

- 2,000 square foot office building
- 21,339 square foot lot, zoned office/commercial
- Former “Firehouse” located in the Linda Mar area
- 1031 exchange property for seller.

## **270 Rockaway Beach Avenue, Pacifica**

- Former “Romanos Restaurant”
- Foreclosure sale with Bank of America.
- Sold to local Hotel owner.
- Worked as the listing agent as well as helping the buyer.
- Worked through issues with the city, coastal commission and county.
- Property is being built upon to expand a nearby hotel.

### **Starboard Commercial:**

Starboard Commercial Real Estate is a leading San Francisco commercial real estate firm, providing clients with full, all-inclusive services since 1991. Locally based, Starboard has organically acquired substantial relationships with tenants, investors, contractors, architects and accountants throughout the San Francisco-Bay Area.

As the largest, independently owned commercial real estate firm in San Francisco with both national and international affiliates, including TCN Worldwide, GVA, AREA, and Office Finder, Starboard delivers clients the highest level of local expertise while offering a global reach.

Starboard agents are positioned to know the San Francisco Bay Area real estate market like no other, knowing the ins and outs of the City and has access to networks of approximately 2,000 office buildings and more than 100 million square feet of office space throughout the Bay Area. Through these networks and unique inside knowledge, Starboard makes it obtainable to assist buyers

and quickly find their ideal space in one of the hottest real estate markets in the world.

### **References:**

- 1) Robert Behmeke – Client & Business Owner; 650-224-3328
  - Sold Commercial office building (former firehouse).
  - Assisted with 1031 Exchange
- 2) Eddie Lau – Client & Business Owner; 650-898-8221
  - Represented Mr. Lau in purchasing a commercial building in a multi tenant/owner shopping center complex for his business.
- 3) ND Patel – Client & Business Owner; 650-464-4321
  - Represented Mr. Patel in the purchase of a bank owned commercial property. This property is currently under development by Mr. Patel who is incorporating the property into his existing nationally franchised Hotel.
- 4) Katherine Moresco – Client and Business Owner; 415-449-4853
  - Currently in Escrow on a multi-unit property in Sonora
  - Represented her in the purchase of a multi-unit commercial property in Pacifica as well as a multi-unit commercial property in Sonora.

- 5) Mario DiGrande – Client and Business Owner; 415-559-1479
  - Currently leasing out a warehouse in San Francisco
  
- 6) April Schneider – Broker, Business Owner, Client; 650-922-2069
  - Frank Represented April in the sale of her 111 acre Equestrian and commercially zoned property in Pacifica.
  
- 7) Rafel Cons – Long Term Client; 650-359-4284
  - Frank has worked with the Cons family for last two decades.
  - Representing them in the sale and purchase of many properties.

### **Professional Community References:**

- 1) Ginz Zari – Government Affairs Director, San Mateo County Board of Realtors; 650-696-8200
  - Frank works with Gina on local, county and statewide Real Estate issues.
  
- 2) Mike O’Niel – Current Pacifica Council Member, former Mayor and Realtor; 650-302-2470
  - Worked with on various Real Estate transactions over the years.
  - Worked with on various city issues.

3) Sue Vauterlaus – Broker Realtor, Current City Council Member, Mayor Pro Tem; 650-291-0470

- Worked with on various Real Estate transactions over the years.
- Worked with on various city issues.

**Additional services offered by broker/firm.**

Starboard Commercial provides services that are unique to each client and to each property. We work with other companies that may be best suited for our clients needs in other cities, states, and countries in the event that we cannot service our client properly.

Marketing, Photographers, web design depending upon the property and client.

Source for environmental issues, architectural, construction.

Services will certainly include internet marketing, MLS ( San Mateo county Board of Realtors), COSTAR ( Commercial MLS), Loopnet, to name a few.

Direct marketing program consisting of mailing, phone calls directly to owners and tenants in the area, contact to recent property buyers and sellers in the area. Depending upon the property, marketing may be targeted to those who may require a specific zoning.



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Property owner may need to have a “discrete” method of marketing depending upon various factors with seller. Landlords and owners depend on us to identify qualified tenants or buyers through targeted marketing. We help landlords lease or sell their properties to qualified prospects. We have the staffing, technology and commitment to effectively market office, retail, industrial and investment properties. Listings are featured in our Exclusive Listing Summaries, which is shared with our local brokerage community network.

**Current Litigation, outstanding judgements and liens:**

- None

**Fee Schedule**

Listing/Selling fee 6%

Fees may vary depending upon the type of property, term, etc..

Leasing fees are usually 6% of gross rent amount.

Necessary meetings with governmental agencies are handled on an hourly rate of \$225 per hour.

Sincerely, 

Frank Vella

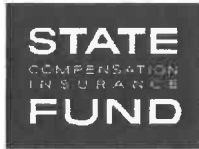
Broker Associate                      DRE#01104977

Broker                                      DRE#01103056

Starboard Commercial Real Estate

650-464-8062

[Frank@Starboardnet.com](mailto:Frank@Starboardnet.com)



P.O. BOX 8192, PLEASANTON, CA 94588

**CERTIFICATE OF WORKERS' COMPENSATION INSURANCE**

**ISSUE DATE: 04-28-2018**

**GROUP:**  
**POLICY NUMBER: 9157975-2018**  
**CERTIFICATE ID: 3**  
**CERTIFICATE EXPIRES: 04-28-2019**  
**04-28-2018/04-28-2019**

**AVISON YOUNG**  
**44 MONTGOMERY ST STE 3300**  
**SAN FRANCISCO CA 94104-4808**

**NA**

This is to certify that we have issued a valid Workers' Compensation insurance policy in a form approved by the California Insurance Commissioner to the employer named below for the policy period indicated.

This policy is not subject to cancellation by the Fund except upon 10 days advance written notice to the employer.

We will also give you 10 days advance notice should this policy be cancelled prior to its normal expiration.

This certificate of insurance is not an insurance policy and does not amend, extend or alter the coverage afforded by the policy listed herein. Notwithstanding any requirement, term or condition of any contract or other document with respect to which this certificate of insurance may be issued or to which it may pertain, the insurance afforded by the policy described herein is subject to all the terms, exclusions, and conditions, of such policy.

Authorized Representative

President and CEO

**EMPLOYER'S LIABILITY LIMIT INCLUDING DEFENSE COSTS: \$1,000,000 PER OCCURRENCE.**

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\_\_\_\_\_  
  
\_\_\_\_\_

EMPLOYER

**STARBOARD COMMERCIAL BROKERAGE, INC.**  
**44 MONTGOMERY ST STE 1850**  
**SAN FRANCISCO CA 94104**

**NA**







# Proposal for Real Estate Broker Services



Fire Station 41 - 531 Obispo Rd., El Granada, CA  
Vacant Lot on Obispo Rd., El Granada, CA

Prepared For:  
Coastside Fire Protection District  
Paul Cole, Chief  
1191 Main Street  
Half Moon Bay, CA 94019

Presented by:  
Tranzon Asset Strategies





June 14, 2018

Coastside Fire Protection District  
Attention: Chief Paul Cole  
1191 Main Street  
Half Moon Bay, CA 94019

Dear Chief Cole:

Tranzon is pleased to submit this proposal, and we are excited about the opportunity to sell the former Fire Station 41 located at 531 Obispo Road in La Granada, along with the vacant lot on the south side of Obispo Road. Our commitment to the Coastside Fire Protection District (CFPD) will be to locate a financially sound buyer and maximize the value of the properties.

Working closely with the CFPD, our team will formulate a marketing message that conveys the unique opportunity presented to a prospective buyer. We will then employ a comprehensive campaign utilizing various media to publicize the sale to a broad range of buyers. One of our most powerful tools is the ability to create extensive due diligence reports, using a number of advanced resources. We believe that by fully educating a prospective buyer up-front, we can eliminate many issues that may come up during the escrow process.

During the course of the marketing and due diligence phases of the campaign, we will prepare regular update reports for the CFPD. We have sophisticated tracking resources that allow us to provide up-to-the-minute statistics and graphs to show the progress of our efforts.

The strategy that we propose to employ is a dual-phase round of bidding. The first phase will be to identify prospects and solicit an initial round of offers. We will then invite the most qualified prospects to submit best and final offers, and we will present the offers and our recommendations to the CFPD.

If Tranzon is selected to handle the sale of the properties, we will begin work on the project immediately. Based on past experience, we anticipate that the project timeline will be 16 weeks. However, this timeline can be adjusted up or down to accommodate requirements by the CFPD.

June 14, 2018  
Page Two

With a success rate of over 90%, we have demonstrated our ability to manage the sale of properties from start to finish. Our team has a core belief in the principles of customer service, and we work actively with buyers and sellers on every phase of a project.

WFS, Inc. dba Tranzon Asset Strategies is a California corporation, and holds a corporate broker license with the State of California Bureau of Real Estate. A copy of the Corporate Resolution is attached. The contact person for this RFQ/P is:

Michael C. Walters, President  
9891 Irvine Center Drive, Suite 200  
Irvine, CA 92618  
Phone: 949.727.9036

This proposal shall remain in effect for ninety (90) days from the date of submittal.

Please feel free to contact me if you have any questions or require further clarification.

Best Regards,



Michael C. Walters, President  
Direct: 949.727.9036  
Cell: 949.439.4750  
Fax: 949.727.9022  
[mwalters@tranzon.com](mailto:mwalters@tranzon.com)

## FIRM EXPERIENCE

Tranzon Asset Strategies was formed in 2001 and has been conducting sales of real estate throughout the United States since 2001. Prior to that we operated as Walters & Associates, which was formed in 1973.

Tranzon Asset Strategies has sold for numerous government agencies and municipalities throughout the United States including the California Department of Insurance (DOI), Federal Deposit Insurance Corporation (FDIC), Resolution Trust Corporation (RTC), General Services Administration (GSA), U.S. Marshal's Service, U.S. Federal and Bankruptcy Courts and many more.

Our firm has extensive experience in the sale of all types of property, including commercial, industrial, retail, development lots and land, residential, and special purpose. All members of our staff have been involved in these projects, each with a minimum of 10 years of experience. Our senior staff members have 25+ years of experience in the sale of real estate throughout California and the Western United States.

Tranzon Asset Strategies operates offices in Northern California, Southern California, Washington State and Colorado.



## STAFF EXPERIENCE

Below is a summary of the qualifications and experience for key staff members who will be working on different phases of the project.

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**Professional Qualifications**  
**Michael C. Walters - Lead Broker**

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As President of Tranzon Asset Strategies, Mike Walters possesses a wide scope of reference pertaining to nearly all property types and possesses the ability to successfully market real estate and capital assets. Over the past 35 years, Mr. Walters has provided professional services for the state and federal courts, lending institutions, developers, the private sector, and a number of government agencies, including the Federal Deposit Insurance Corporation (F.D.I.C.), Resolution Trust Corporation (R.T.C), and the U. S. Small Business Administration (U.S.S.B.A.). His experience includes the sale of real property, capital assets and financial instruments, as well as appraisals and full brokerage services.

In addition to a Bachelor of Business Administration degree in Finance and Real Estate from the University of North Texas, Mike completed graduate studies in Finance and Real Estate at Southern Methodist University's Cox School of Business as well as graduate courses in Environmental Issues in Real Estate at Texas A & M University. Mike holds a California Real Estate Broker license, and is a member of the National Association of Realtors, the California Association of Realtors, and the Pacific West Association of Realtors.

As Lead Broker, Mike will be responsible for general oversight of the project. His roles would include: executing all contracts; working with the Successor Agency to establish terms and conditions of the sale and prepare purchase contracts; overseeing Tranzon staff on marketing and due diligence; attending all property showings; updating the Successor Staff on marketing efforts and prospective buyers; guiding prospects through the sale process and requirements; evaluation of offers; preparation of reports relating to economic analyses of all offers; recommendation to Successor Agency of the best offer; and management of escrow and closing.



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### Professional Qualifications

#### Tiffany R. Cook

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As Vice President of Marketing for Tranzon Asset Strategies, Tiffany Cook is responsible for all aspects of property marketing and project management. In addition, she is in charge of the daily operations of the Irvine office of TAS. With over 25 years of experience in the real estate industry, she is experienced in all phases of the sale process for real and personal property. Tiffany is in charge of all marketing, including design and production of brochures, newspaper advertisements, and due diligence materials for a wide variety of assets. In addition, she works closely with buyers and sellers, and manages property showings.

Tiffany attended Chaminade University in Honolulu, and is a licensed Real Estate Broker in California and Nevada. She is also a member of the National Association of Realtors, the California Association of Realtors, and the Pacific West Association of Realtors.

As Marketing Manager for this project, Tiffany will be responsible for design and preparation of all marketing materials, including a direct mail brochure, placement of newspaper and online advertisements, emails and showing materials. In addition, she will be preparing the due diligence package to be disseminated to prospective buyers. Tiffany will be present at all property showings, and will work closely with other staff throughout the project to assist with prospect management, report preparation and the escrow process.





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**Professional Qualifications**  
**Peter Wessling**

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Peter joined Tranzon in 2005 where his focus has been on the disposition of both business and real property assets. With a primary concentration on commercial properties, Peter has been involved in the sale of real property from multiple asset classes, including residential, multi-family, development land, office buildings, industrial and manufacturing facilities, shopping centers, small retail service stations, and convenience stores. Peter works closely with banking, legal, and real estate communities throughout the US providing representation for sellers in need of expedient real estate disposition solutions that range from single property holdings, to complex multiple property portfolios.

Peter received his BA from Colorado State University where he was captain of the ski team and led the team to the national championships in 2000. Peter holds a California real estate license and a Colorado broker license. Peter is also the President-Elect for the Rocky Mountain Turnaround Management Association.

As Buyer Manager for this project, Peter will be fielding all inquiries from prospective buyers. He will be responsible for maintaining a database with all prospect contact information, including detailed notes of conversations and feedback. He will also be providing prospects with access to all due diligence materials. He will be present at all property showings, and will work closely with Mike Walters to evaluate the level of interest and prospect qualifications.



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### Professional Qualifications

#### Lonny Papp

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Lonny has been involved in the real estate and mortgage industry since 2001 and joined the Tranzon team in 2009. His main focus has been in the fields of residential & commercial real estate and represents Tranzon in the Sacramento area of Northern California. Lonny has been involved in hundreds of residential, commercial and capital asset sales, using both the traditional and auction methods of selling. Lonny is an account manager for government operations including the FDIC and is incredibly familiar with the communication & reporting needs between Tranzon and our government agency clients.

Lonny is a USPAP certified Appraiser and holds a California Real Estate License. Lonny works with numerous charities, schools and other non-profits including the American Heart Association. He operates in Roseville, California and provides our Northern California real estate services from this location.

Working as sales support for this project, Lonny will be involved in the assemblage of due diligence materials, and will be responsible for field operations. He will also be present at all property showings and will be available to fill in as needed.





## PREVIOUS SALES

### Santa Cruz Sentinel Building - Santa Cruz, CA

The original home of the Santa Cruz Sentinel newspaper, the building sat empty when the newspaper relocated to larger facilities. Tranzon was hired to sell the historic downtown building, and we generated interest from over 50 prospective buyers. The property sold for \$4,240,000, and the new owners worked with city leaders to renovate the building to a green-certified, high-tech collaborative work space. The exterior was preserved, and the new use has helped to revitalize the downtown area.

Mike Walters acted as the lead broker for the project, managed the extensive due diligence process, and handled the closing; Tiffeny Cook managed the marketing campaign and prospect management; Mike Walters and Tiffeny Cook handled property showings.

*Before*



*After*



### **J. Harold Dollar Building - San Francisco, CA**

Built in 1919, this 16-story office building located at 351 California Street sits in the heart of the Financial District. Built as an expansion to the Dollar Shipping Company's headquarters, the building served as the headquarters of Pacific Bank and was the one-time office of former Mayor Willie Brown. Tranzon was retained to facilitate the sale of this historic building, and marketing efforts resulted in 188 inquiries from prospective buyers. The final sale price for the building was \$35,000,000, and the beautiful Renaissance-Baroque ornamentation remains as a testament to the architecture of that era.

Mike Walters acted as the lead broker for the project, managed the extensive due diligence process, and handled the closing; Tiffeny Cook managed the marketing campaign and prospect management; Mike Walters, Peter Wessling, and Tiffeny Cook handled property showings.



### **Villa Nova Ristorante - Newport Beach, CA**

This iconic dining spot located on the water in Newport Beach was the long-time home to Villa Nova Ristorante. After running the restaurant for 20 years, the owner made the decision to retire, and hired Tranzon to sell the property. With expansive views of Newport Harbor and frontage on Coast Highway, the desirable location generated interest from over 125 prospective buyers. The property ultimately sold for \$6,600,000, and the building was remodeled to update its tired façade into a more elegant profile.

Mike Walters acted as the lead broker for the project, and managed the closing; Tiffeny Cook managed the due diligence, marketing campaign and prospect management; Peter Wessling, Lonny Papp and Tiffeny Cook handled property showings.

*Before*



*After*



## M Street Arts Complex - Fresno, CA

Tranzon was hired to sell a vacant commercial property in downtown Fresno. Built in 1954, the 24,000sf single story building was primarily used as a warehouse. Our marketing campaign produced 20 prospects, and the property sold for \$675,000. The property is now in use as an artists collective, and is a prime example of how an older building revisioned can bring life to a downtown area.

Mike Walters acted as the lead broker for the project, and managed the closing; Peter Wessling worked in conjunction with Mike on buyer interaction and property showings; Tiffeny Cook managed the due diligence and marketing campaign; Lonny Papp also worked on due diligence.

Before



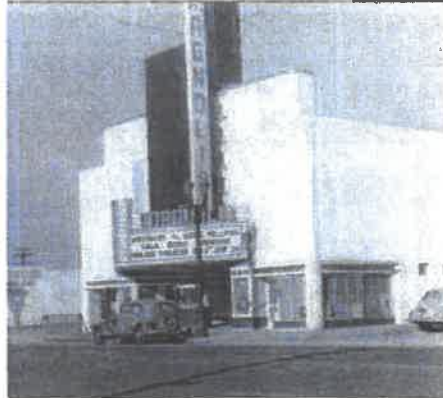
After



## Magnolia Theatre Building - Burbank, CA

Tranzon handled the sale of the historic Magnolia Theatre building located in Burbank, California. Constructed in 1940, the property had a long run as a movie theatre before being converted to a recording studio in the 1970's. It's art deco façade has been featured in many movies, most recently *LaLa Land*. Notable artists to record there include Frank Sinatra, Barbra Streisand, Michael Jackson, Whitney Houston, Paul McCartney and many more. As a result of our marketing efforts, Tranzon received inquiries from 350+ prospective buyers, and showed the property to 135 groups. The final sale price was \$5,650,000.

Mike Walters acted as the lead broker for the project, managed the extensive due diligence process, and handled the closing; Tiffeny Cook managed the marketing campaign and prospect management; Mike Walters, Peter Wessling, and Tiffeny Cook handled property showings.



## BUSINESS REFERENCES

Robert P. Mosier, Receiver  
Mosier & Co.  
3151 Airway Avenue, Suite A-1  
Costa Mesa, CA 92626  
Phone: 714.432.0800  
[rmosier@mosierco.com](mailto:rmosier@mosierco.com)

Randle Barnett  
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Roseville, CA 95661  
Phone: 916.787.9228  
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Kevin Donahoe  
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J. Henk Taylor  
Lewis Roca Rothgerber LLP  
201 East Washington Street, Suite 1200  
Phoenix, AZ 85004-2595  
Phone: 602.262.0254  
[htaylor@lrriaw.com](mailto:htaylor@lrriaw.com)



## MARKETING EXPERIENCE

Tranzon Asset Strategies has extensive experience marketing commercial properties throughout the Western United States. Our clients include municipal, state and federal government agencies; national lenders; US Bankruptcy Court; federal and state court Receivers; developers; and private sellers. We have held contracts with the California Department of Insurance (DOI), Federal Deposit Insurance Corporation (FDIC), Resolution Trust Corporation (RTC), General Services Administration (GSA), U.S. Marshals Service, and various municipalities.

We have sold numerous properties that are sensitive to development standards, zoning restrictions, environmental issues and existing tenancies. The majority of the properties that we sell are of a complex nature, and we pride ourselves on being able to offer a high level of expertise for these types of transactions. All members of our staff have been involved in these projects, each with a minimum of 10 years of experience. Our senior staff members have 25+ years of experience in the sale of properties for government agencies.

Tranzon maintains a Best Practices policy, with each step of the process outlined in detail. We use fieldwork forms to conduct property research; marketing checklists to ensure that each property receives maximum exposure; prospect and seller checklists for effective and timely communication; and closing process forms to keep track of key milestones throughout the escrow process.

Tranzon has an in-house team that produces high-impact professional marketing materials that are designed to highlight the attributes of each property. Our designers utilize professional photography and videography, and employ the most current technology available.

The following is an overview of the various components for the recommended marketing campaign:

### **Direct Mail**

Tranzon will oversee the production of customized direct mail pieces to send to the targeted market, regional and market specific brokers and buyers within our exclusive database. The brochure details specific property information, explains the method of sale and provides an overview of the terms and conditions of the sale.

### **Display and Digital Advertising**

Tranzon will prepare and place attractive, high-impact advertisements in various newspapers in order to attract potential buyers. Ads will contain the sale date and time, property photos, and property highlights based on publication and target audience. Ads will also contain our toll-free phone number and web address for easy access to further information. We have relationships with advertising representatives for every major newspaper in the state, and we work closely with them to obtain the best coverage for each specific property.

### **Internet Marketing**

The property will be listed in detail on our website, which averages over 85,000 hits per business day. When a property is posted on the website it is automatically linked with up to 73 additional websites. The other websites include Property Line, LoopNet, CCIM, Commercial Brokers Association, CoStar, GlobeSt.com, CBA, and various real estate websites.





### **E-Mail Distributions**

Tranzon submits email distributions via a number of nationwide services to prospective buyers, real estate brokers and investors. E-mail has been successfully utilized in the past and is an excellent conduit for reaching buyers in a timely fashion.

### **Buyer Database**

We maintain a database of all buyer communications and notes through our CRM platform, and gather as much contact information as possible. Our database has over 20,000 members who have visited our website, contacted us directly and/or subscribed to the property list based on their registered property type and geography interest. The database is maintained on a regular basis to ensure that it is up-to-date and extensive notes are kept for each prospect.

### **Public Relations**

Working cooperatively, we will establish an appropriate "marketing message" which explains the basis for the sale. This message will be elaborated into the form of a press release for immediate distribution.

### **Property Information Packages**

The more educated a buyer is the easier it is to make a buying commitment. Tranzon produces property information packages containing all available information on the property. A typical package includes, but is not limited to, the following components:

- Descriptive Project Summary
- Photographs
- Location Maps
- Demographics and Traffic Counts
- GIS Reports
- Parcel Maps
- Assessor and Property Tax Information
- Zoning Code
- Site Plans and Building Sketches
- Environmental Reports
- Tenant and Lease Information

We have the capability of requiring confidentiality agreements before a prospect is granted access to the package. This can be done electronically through our website, or through a data room for larger files.

### **Telemarketing**

Telemarketing furnishes us a strong indication of how many serious offers to expect and what information to provide or concerns the buyers may have of the property. This information is relayed to the seller in progress reports, telephone updates and personal meetings, and used by Tranzon to adjust marketing efforts.





## DISCLOSURES

Are there any prior or pending legal proceedings or actions that have been filed against applicant or its wholly owned subsidiaries, or any prior or pending arbitrations or mediations?

No.

Does applicant have any outstanding judgments or liens against it?

No.

Has applicant ever defaulted on a loan or other financial obligation?

No.

Are there any prior or pending administrative complaints/hearings against, or any debarment or suspension of or other administrative determination by any federal, state or local government entity relating to applicant against, any of applicant's affiliated corporations or partnerships in which applicant is a general partner, or other business entity?

No.

Has applicant or its wholly owned subsidiaries ever filed for bankruptcy?

No.



## **BROKER FEE / COMPENSATION**

Tranzon proposes the use of a 4.75% commission, to be paid through escrow.

In the event that a buyer is represented by a licensed California real estate broker, we will offer a commission of 2.5% to a properly registered buyer broker, to be paid from our commission.

All marketing and sale expenses as outlined in this proposal shall be paid by Tranzon from its fee.



## **INSURANCE REQUIREMENTS**

### **Licensure - State of California**

WFS, Inc. dba Tranzon Asset Strategies – BRE License # 01850659

Michael C. Walters, Broker – BRE License 01146795

Tiffany R. Cook, Broker – BRE License 01406706

Peter J. Wessling, Salesperson – BRE License 01756045

Lonny R. Papp, Salesperson, BRE License 01781892

### **Insurance Coverage**

#### Farmers Insurance Company - Commercial General Liability Policy

General Aggregate - \$4,000,000

Products and Completed Operations Aggregate - \$2,000,000

Personal and Advertising Injury Each Occurrence - \$2,000,000

Automotive Liability - \$2,000,000

Deductible on each - \$500

#### Farmers Insurance Company – Workers Compensation Insurance Policy

Each Occurrence - \$1,000,000

#### Real Estate Professional Errors & Omissions Insurance Policy

Each Claim - \$1,000,000

Deductible on each - \$5,000

#### Beazley Breach Response – Database, Information Security and Privacy Breach Policy

Each Claim - \$1,000,000

Deductible on each - \$2,500





## The Tranzon Difference

- **Intimate property knowledge:** We do our research, and prepare a comprehensive due diligence package. Our focus is to become familiar with the neighborhood and the property, and pass this information on to our buyers.
- **Versatility:** In order to achieve the best results possible, we use a number of different strategies including live, on-line, sealed bid and hybrid auctions.
- **Property-Specific Marketing:** The seller gets more than just a sign and a web listing, or a generic ad hoping for random interest. A targeted market is created for each property, identifying end users as our primary buyer, not just investors.
- **92% Success Rate:** In 2016, Tranzon Asset Strategies successfully sold and closed 92% of all properties taken to auction.
- **Realistic Results:** We educate sellers on the property and current market conditions. The last thing we want is to waste the seller's time and money with unrealistic recovery expectations.
- **Experience:** We have a company history going back to 1963, 750+ combined years of experience throughout the Tranzon team, and a proven track record of success.
- **Long-term Clients:** With clients who have used us for 20+ years, including major US financial institutions, trustees and receivers, we've shown our ability to maintain strong business relationships and provide personal attention to each customer.
- **Knowledge:** We have a broad knowledge base with experience in virtually every type of asset.
- **Tranzon Partners:** Tranzon has the largest licensed footprint in the industry, which offers the benefit of experienced Tranzon partners nationwide.
- **Ethics:** Tranzon has a written code of ethics and extensive training for our entire team. All associates are licensed, and we pride ourselves on a clean license history, continuing education, and risk management policies in place.