

AGENDA SUMMARY
OVERSIGHT BOARD TO THE SUCCESSOR AGENCY TO THE
DISSOLVED ARROYO GRANDE REDEVELOPMENT AGENCY
THURSDAY, JUNE 16, 2016
2:00 P.M.
ARROYO GRANDE CITY HALL CONFERENCE ROOM
300 E. BRANCH STREET, ARROYO GRANDE

1. CALL TO ORDER

2. ROLL CALL

3. FLAG SALUTE

4. PUBLIC COMMENT

Members of the public wishing to address the Oversight Board on any item described in this Agenda may do so when recognized by the Presiding Officer.

5. PRESENTATIONS

None.

6. BUSINESS ITEMS

6.a. Consideration Of Recommendation Of Real Estate Agent For Faeh Avenue Property

Recommended Action: Approve the recommendation of the Ad Hoc committee for Real Estate Agent Services and forward the recommendation to the City Council for consideration.

Documents: [OB 2016-06-16_6a Real Estate Agent.pdf](#)

7. ADJOURNMENT

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**OVERSIGHT BOARD TO THE SUCCESSOR AGENCY
TO THE DISSOLVED REDEVELOPMENT AGENCY
OF THE CITY OF ARROYO GRANDE**

AGENDA REPORT

TO: Oversight Board
FROM: Debbie Malicoat, Director of Administrative Services, City of Arroyo Grande (Successor Agency)
MEETING OF: June 16, 2016
SUBJECT: Recommendation of Real Estate Agent for Faeh Ave Property

RECOMMENDATION

That the Oversight Board approve the recommendation of the Ad Hoc committee for Real Estate Agent Services and forward the recommendation to the City Council for consideration.

DISCUSSION

There are two parcels of real property owned by the Former Redevelopment Agency, one located on Faeh Avenue near El Camino Real and the other located on Pearwood Avenue. To assist in the process of disposing of these properties, the City advertised Request for Proposals (RFP) from qualified real estate agents. In addition, an Ad Hoc committee was created to review the proposals and make a recommendation on the selection of the agent(s). The Ad Hoc committee consists of one member of the Oversight Board, Lynn Compton, one member of the City Council, Kristen Barneich, and one member of the Planning Commission, Glen Martin.

The Ad Hoc committee met on March 24, 2016 to review the two proposals received and recommended that the City reject both proposals and readvertise the RFP as neither proposal was deemed responsive. Subsequently, three proposals were received from Lee & Associates, Triad Real Estate Group and Higgenbotham Auctioneers, which were reviewed by the committee on May 25, 2016.

Based on the review of the proposals, the Ad Hoc committee recommends that the City enter into an agreement for consultant services with Lee & Associates to provide real estate agent services for the Faeh Avenue property and that the Oversight Board approve this recommendation and forward it to the City Council for consideration. In addition, the Ad Hoc committee recommends that the City enter into an agreement for consultant services with Triad Real Estate Group to provide real estate agent services for the Pearwood Avenue property.

The sale of the Faeh property, as well as the approval of the agent, is subject to approval by the Oversight Board. The Pearwood property is not governed by the same

**OVERSIGHT BOARD
RECOMMENDATION OF REAL ESTATE AGENT FOR FAEH PROPERTY
JUNE 16, 2016
PAGE 2**

requirements for sale as the Faeh property and no Oversight Board approval is necessary to select an agent or sell the property.

ALTERNATIVES

- 1) Approve the recommended action affirming the selection of Lee & Associates and forward to the City Council for consideration;
- 2) Do not affirm the Ad Hoc committee recommendation, recommend Triad Real Estate Group as the agent and forward to the City Council for consideration; or
- 3) Provide direction to staff

ATTACHMENTS

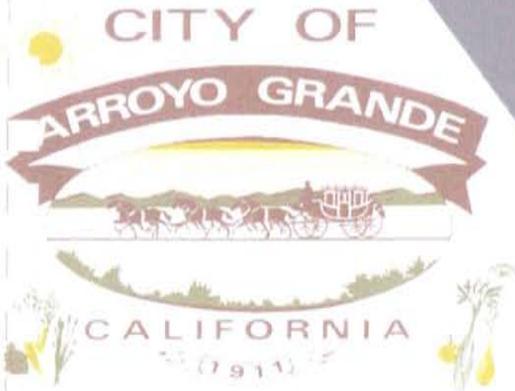
- 1) Proposal from Lee & Associates
- 2) Proposal from Triad Real Estate Group

FOR
SALE

727 El Camino Real
ARROYO GRANDE, CA 93420

Proposal For Commercial Services

April 21, 2016



Presented To:
Debbie Malicoat
Director of Real Estate Services
City of Arroyo Grande

Presented By:
Marty Indvik
Lic. #961882
Principal
805.782.9000 x 17
mindvik@lee-associates.com

Jeff Allen
Lic. #01313074
Associate
805.782.9000 x 20
jallen@lee-associates.com



Lee & Associates Central Coast
leecentralcoast.com
1230 Higuera Street, San Luis Obispo, CA 93401
805.782.9000

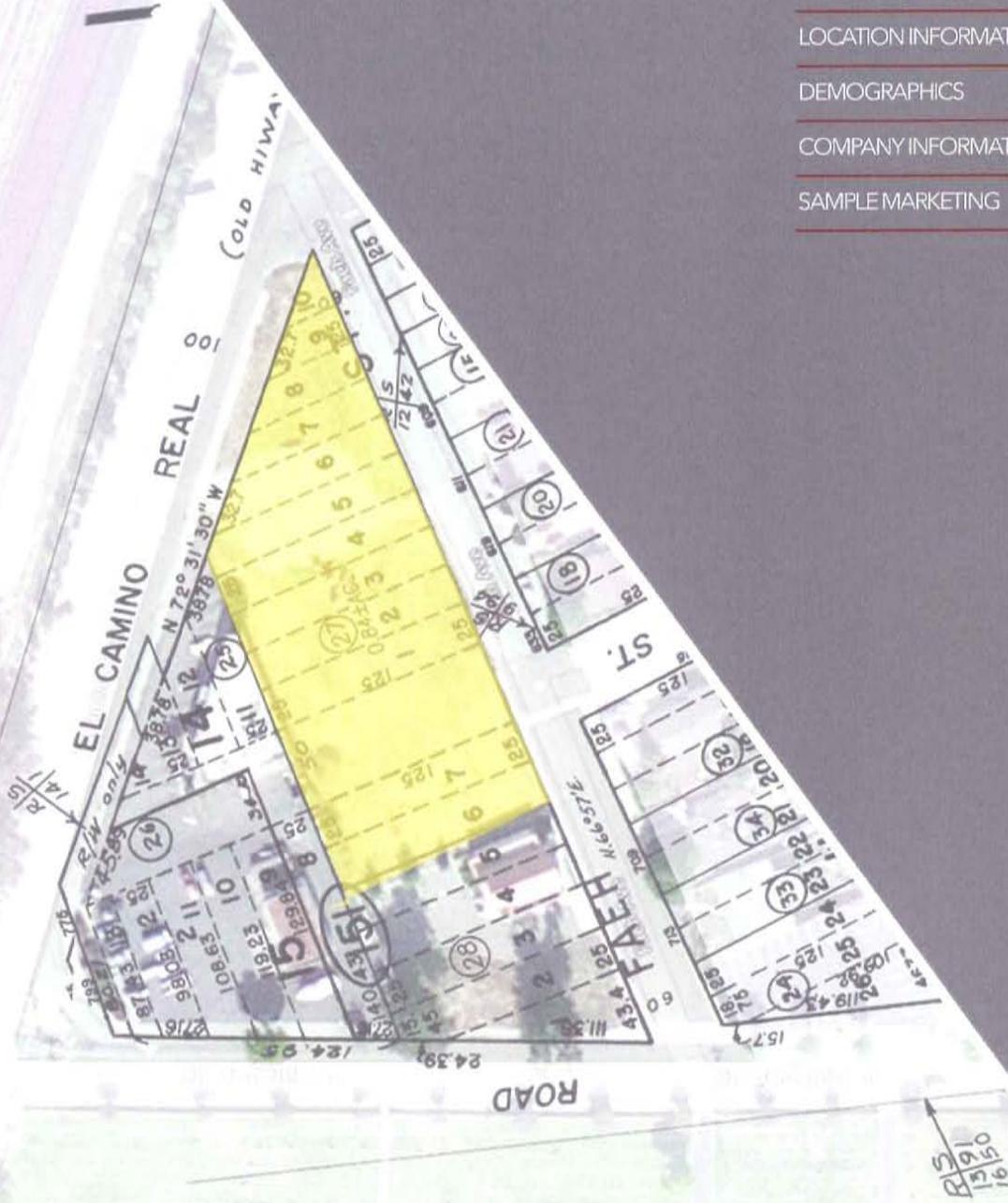


**FOR
SALE**

727 El Camino Real
ARROYO GRANDE, CA 93420

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April 21, 2016

Re: Real Estate Services RFP

Dear Ms. Malicoat,

Please let this presentation serve as indication of our desire for consideration for commercial services on the Faeh Avenue Property located at APN 006-151-027.

As detailed in the proposal, Lee & Associates is the largest broker-owned firm in North America with over 50 locations across the U.S, providing a wide range of specialized commercial real estate services on a local, regional and national level. Lee and Associates has brokered development, sales and leasing transactions throughout the Tri-County area and beyond.

Our extensive local market knowledge, seasoned agents and resources, uniquely position our firm to provide an integrated approach that extends outside the Central Coast.

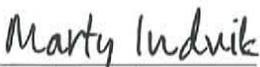
The Faeh parcel is a very compelling commercial property that will benefit from a strategic marketing campaign that extends to the local client base but also broadens its reach to an extensive brokerage and development community outside the Central Coast. With a network of more than 800 brokers nationwide, Lee & Associates has the unique ability to market this property throughout our own network to a broad spectrum of buyers creating greater market exposure. We are able to balance the broader approach while attending to the local assemblage of buyers. In our experience when the level of competition and awareness rises among buyers the pricing and terms rise with it.

To provide a sense of our recent work we have provide a brief list of relevant land transactions:

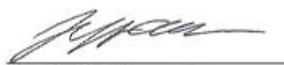
- » **802 Experimental Station, Paso Robles:** 12.2 Acre Multi-family Development Site
Under Contract Represented Seller: Established client based out of the area
- » **Golden Hill Road/San Antonio Winery:** 5 Acre Commercial Property: 90,000 square foot winery development. Sold. Represented Buyer: Los Angeles based client.
- » **Dallons Road, Paso Robles:** 2 Acre Commercial Property: Hotel Development (Hilton Garden Inn)
Sold. Represented Buyer: Out of area client
- » **265 Meissner Lane, San Luis Obispo:** 20 Acre Land: Development of 300,000 square foot commercial services park Under Contract. Represented Buyer: Well-established client. Bi-coastal based.

We trust the materials provided the basis from which to make an initial determination as to our firm's ability to represent the City on the sale of the subject property. We are excited at the prospect of serving as your consultants and representing your interest in the marketplace.

Sincerely,



Marty Indvik



Jeff Allen

Marty Indvik

Principal

805.782.9000 x17 | Lic# 0961882

mindvik@lee-associates.com

Jeff Allen

Broker Associate

805.782.9000 x20 | Lic# 01313074

jallen@lee-associates.com

Lee & Associates - Central Coast Coast

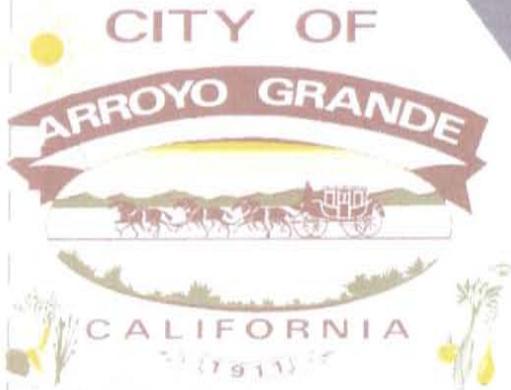
A Member of the Lee & Associates® Group of Companies

1230 Higuera Street | San Luis Obispo | CA 93401

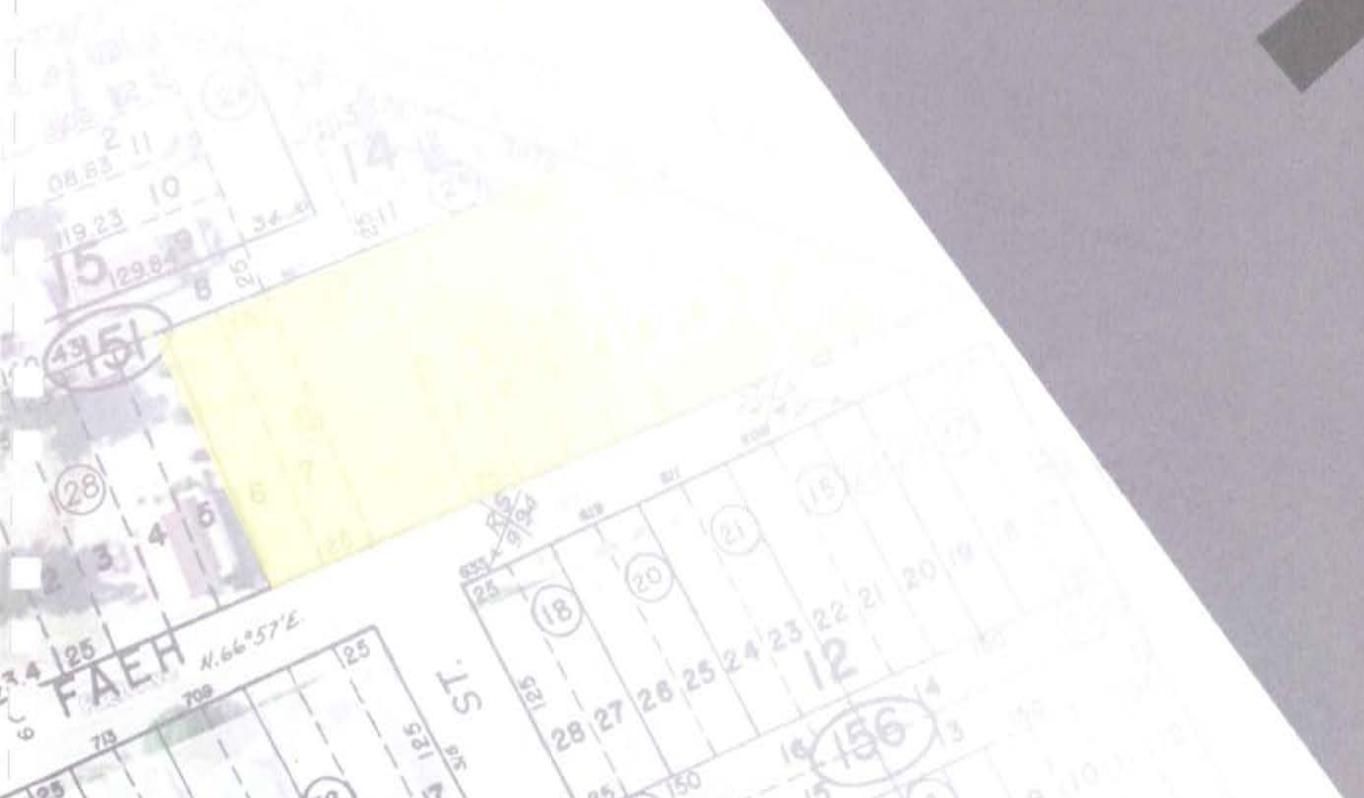
leecentralcoast.com

PROPERTY INFORMATION

- Executive Summary



1



**FOR
SALE**

727 El Camino Real
ARROYO GRANDE, CA 93420

SECTION 1 - Executive Summary



OFFERING SUMMARY

Lot Size: 0.83 Acres
36,250 SF

Sale Price: Subject To Offer

Parcel ID: 006-151-027

Zoning: Highway Mixed Use

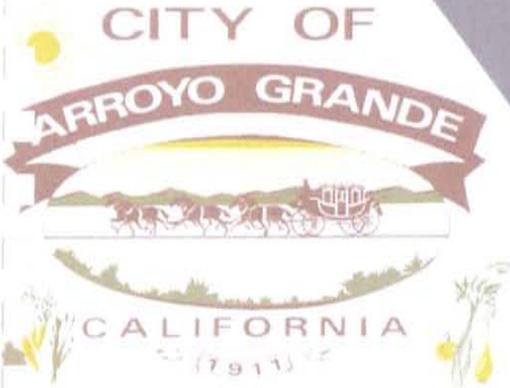
PROPERTY OVERVIEW

Vacant parcel of land located on Faeh Avenue in Arroyo Grande, CA. The 0.83 acre parcel (APN: 006-151-027) is on the corner of El Camino Real and Faeh Avenue. The lot area totals 0.83 acres minus public improvements is 0.79 acres, (34,630 sq. ft.).



LOCATION INFORMATION

- Regional Map
- Location Maps
- Aerial Map
- Site Plan

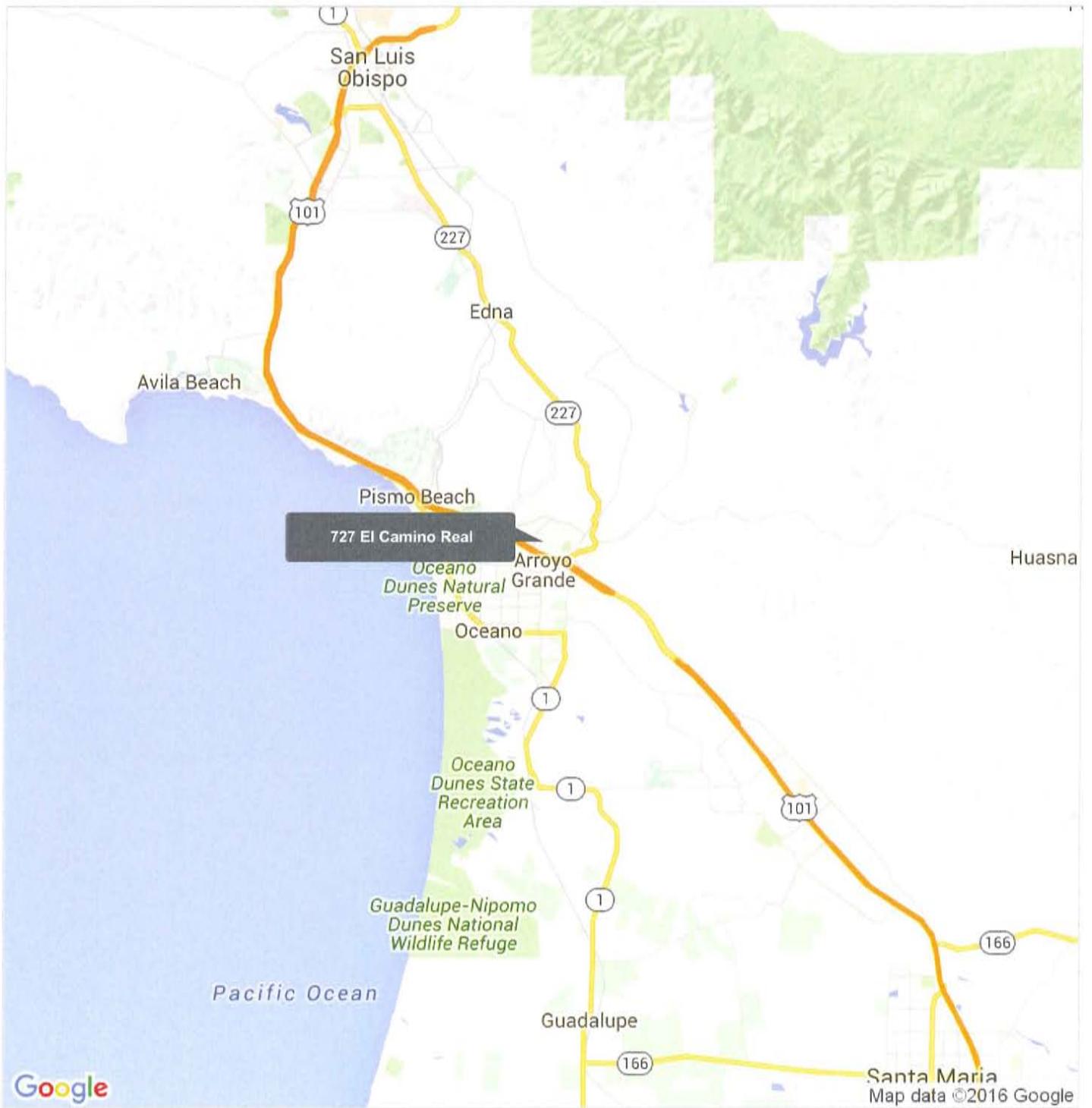


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**FOR
SALE**

727 El Camino Real
ARROYO GRANDE, CA 93420

SECTION 2 - Regional Map



**FOR
SALE**

727 El Camino Real
ARROYO GRANDE, CA 93420

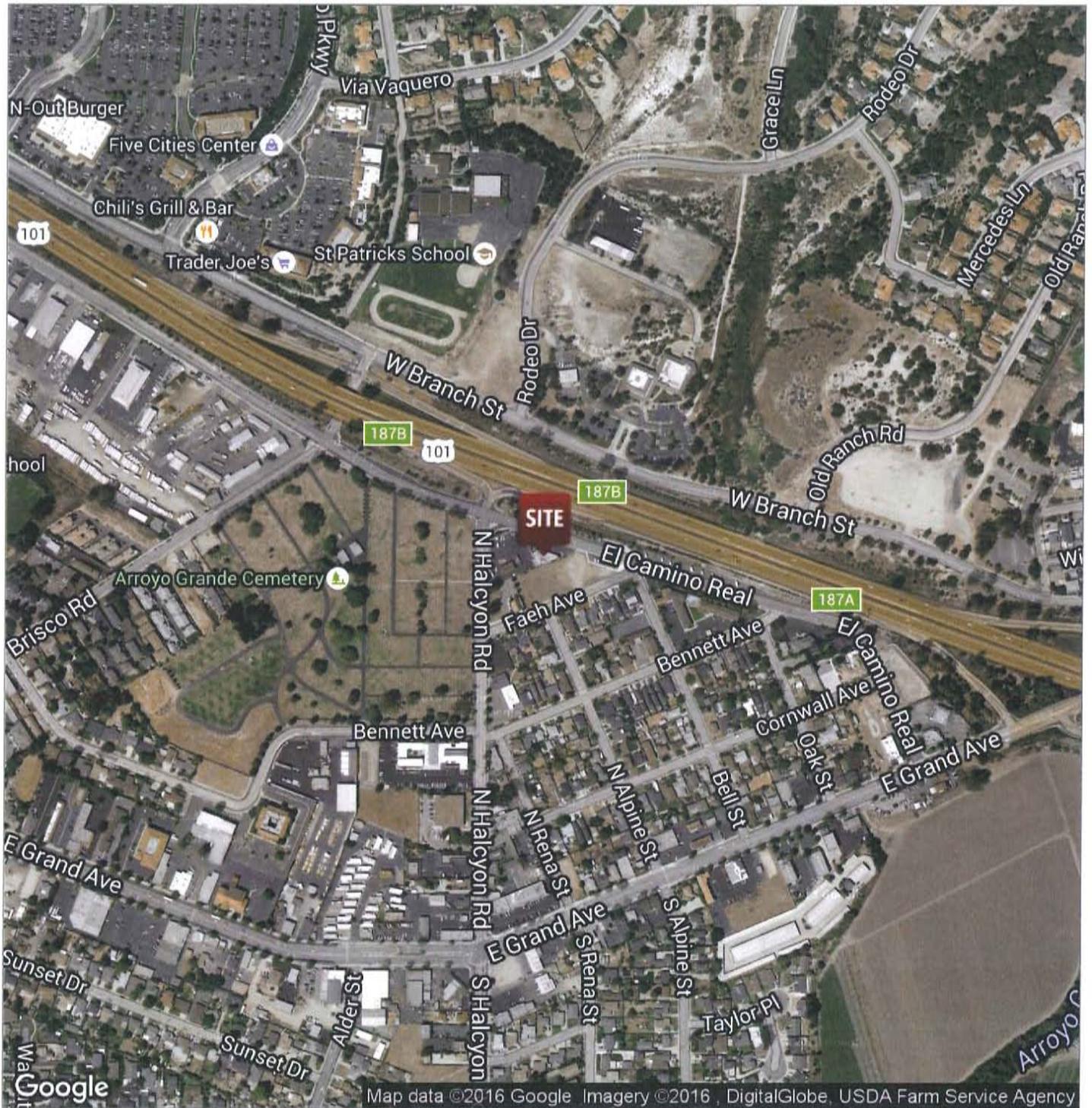
SECTION 2 - Location Maps



**FOR
SALE**

727 El Camino Real
ARROYO GRANDE, CA 93420

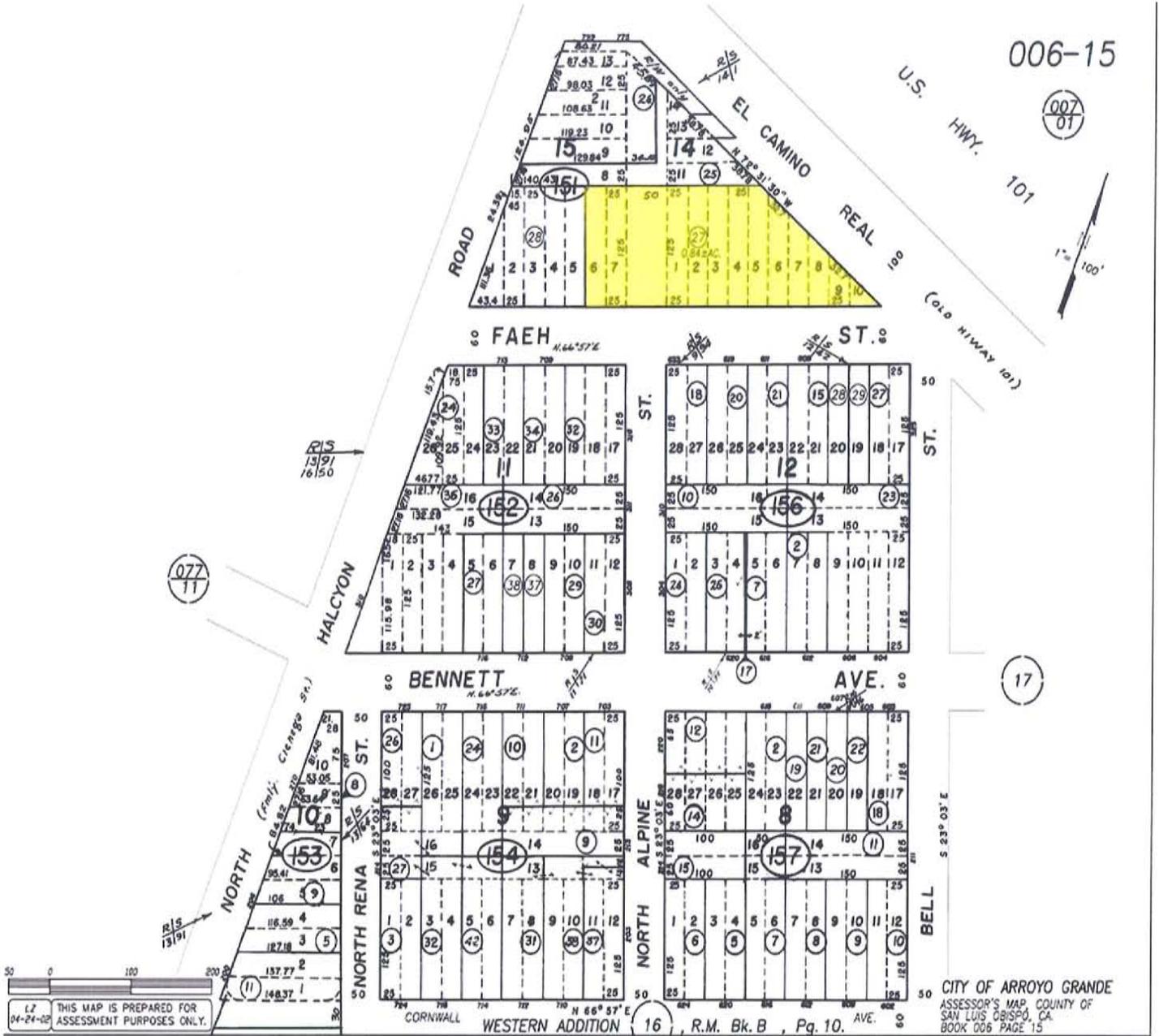
SECTION 2 - Aerial Map



FOR
SALE

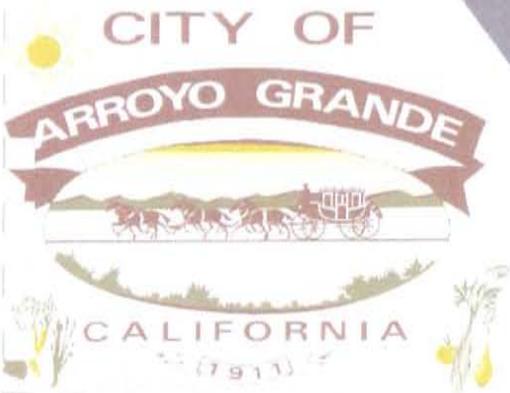
727 El Camino Real
ARROYO GRANDE, CA 93420

SECTION 2 - Site Plan



DEMOGRAPHICS

- Demographics Report
- Demographics Map



3



LEE &
ASSOCIATES®

COMMERCIAL REAL ESTATE SERVICES

Lee & Associates Central Coast
leecentralcoast.com
1230 Higuera Street, San Luis Obispo, CA 93401
805.782.9000

SECTION 3 - Demographics Report

	1 MILE	3 MILES	5 MILES
Total households	3,518	18,788	21,783
Total persons per hh	2.4	2.5	2.5
Average hh income	\$72,670	\$68,527	\$72,028
Average house value	\$463,390	\$440,516	\$468,555

	1 MILE	3 MILES	5 MILES
Total population	8,597	47,169	54,107
Median age	42.1	38.9	40.1
Median age (male)	41.2	37.6	38.7
Median age (female)	42.9	40.6	41.7



SECTION 3 - Demographics Map



POPULATION	1 MILE	3 MILES	5 MILES
TOTAL POPULATION	8,597	47,169	54,107
MEDIAN AGE	42.1	38.9	40.1
MEDIAN AGE (MALE)	41.2	37.6	38.7
MEDIAN AGE (FEMALE)	42.9	40.6	41.7

HOUSEHOLDS & INCOME	1 MILE	3 MILES	5 MILES
TOTAL HOUSEHOLDS	3,518	18,788	21,783
# OF PERSONS PER HH	2.4	2.5	2.5
AVERAGE HH INCOME	\$72,670	\$68,527	\$72,028
AVERAGE HOUSE VALUE	\$463,390	\$440,516	\$468,555



COMPANY INFORMATION

- Marty Indvik - Resume
- Jeff Allen - Resume
- References
- Land Expertise
- Lee & Associates - National
- Lee & Associates - Local



COMMERCIAL REAL ESTATE SERVICES

CENTRAL COAST

4



Marty Indvik

Principal

License ID# 0961882

office 805.782.9000

cell 805.440.6861

fax 805.782.9211

mindvik@lee-associates.com

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San Luis Obispo, CA 93401

PARTIAL CLIENT LIST

- » Wells Fargo Bank
- » Mission Community Bank
- » American Perspective Bank
- » CygNet Software
- » REC Group
- » AeroMech/AME UAS
- » Westpac Holdings
- » Amazon
- » TRW
- » Scanning Electron Analysis Lab
- » Thai Airways
- » Swiss Airways

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OFFICE, INDUSTRIAL, INVESTMENT, CONSULTING

Brokerage

PROFILE

Marty is a Principal with Lee Central Coast. Prior to moving to San Luis Obispo, he was an agent with the Lee & Associates City of Industry office where he had the opportunity to work with the firm's founder Bill Lee. Marty was recruited by Lee while he was an agent for Grubb & Ellis's South Bay office in Southern California. Marty has primarily specialized in office and industrial leasing and sales. In addition, he has been involved in various investment transactions. He has brokered over \$60 million in sales in the recent past.

Marty loves the Central Coast and enjoys being part of Lee and the team oriented atmosphere of the firm. When not attending the real estate business, Marty serves on the Board of the San Luis Obispo Classical Academy. Most of all, he enjoys spending time with his wife Denise and three sons.

NOTABLE TRANSACTIONS

As a Commercial Real Estate Advisor for Lee & Associates, Mr. Indvik has represented the interests of landlords, developers and tenants within northern Santa Barbara and San Luis Obispo counties. Mr. Indvik has been involved with many office and industrial projects, including:

» Tennis Warehouse	San Luis Obispo, CA	103,000 SF
» Belle Mill Landing	Red Bluff, CA	119,000 SF
» Center @ Nor'Wood	Colorado Springs, CO	73,000 SF
» Dioptics Facility	San Luis Obispo, CA	98,000 SF
» Granada Building	San Luis Obispo, CA	25,000 SF
» Visalia Shopping	Center Visalia, CA	102,000 SF
» Rail Road Square	San Luis Obispo, CA	23,000 SF
» River Oaks Center	Paso Robles, CA	20,000 SF
» Sycamore Court	Atascadero, CA	25,000 SF

EXPERIENCE

- 2003 ~ present: Broker Associate, Lee & Associates - Central Coast
- 1992 ~ 2003: Educator/Administrator, SLCUSD & TUSD, San Luis Obispo Co.
- 1987 ~ 1992: Lee & Associates - City of Industry/ Grubb & Ellis South Bay

EDUCATION

- Masters of Education, California Polytechnic State University
- B.S. in Business Administration with emphasis in Economics, University of Redlands



Jeff Allen

Broker Associate
License ID# 01313074

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mobile 805.801.7676
fax 805.782.9211

jallen@lee-associates.com

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San Luis Obispo, CA 93401

PARTIAL CLIENT LIST

- » *NBCUniversal*
- » *Deutsche Bank*
- » *RREEF*
- » *Jones Lang LaSalle*
- » *CBRE*
- » *AEW*

Specializing in

**INSTITUTIONAL INVESTMENT SALES,
OFFICE, INDUSTRIAL AND RETAIL LEASING,
& VALUE OPTIMIZATION**

Brokerage

PROFILE

Jeff Allen has 18 years of commercial real estate experience and has brokered more than 1,000 lease transactions. Mr. Allen specializes in institutional investment sales, office, industrial and retail leasing, and value optimization.

Prior to joining Lee, Jeff was a General Manager for several public and private companies including Transwestern, RREEF Management & Spieker Properties, where he was responsible for the leasing and management of 17 million square-feet. He represented clients such as AEW, Deutsche Bank, JLL, CBRE, Morgan Stanley, Spieker Properties, TIAA-CREF, LNR and NBCUniversal.

Jeff has been recognized for including Most Deals Done in the Western Region and 4th in customer service within the United States. Most recently, Mr. Allen founded Allen Commercial where he supported institutional clients in acquiring commercial real estate on the central coast.

Jeff is a graduate of California Polytechnic State University with a Bachelor of Science degree in Quantitative Economics.

NOTABLE TRANSACTIONS

» Hanjin Shipping	Cerritos, CA	26,000 SF
» Kennedy Wholesale	Irwindale, CA	34,000 SF
» Sues, Young & Brown	Irwindale, CA	39,000 SF
» ABS Computer Tech	City of Industry, CA	90,000 SF
» Brea Corporate Plaza	Brea, CA	119,000 SF
» Brea Central Business Park	Brea, CA	157,000 SF
» Brea Park Centre	Brea, CA	169,000 SF
» Walnut Tech Business Center	Walnut, CA	200,000 SF
» Tri-Freeway Business Park	Anaheim, CA	206,000 SF
» Cerritos Towne Centre	Cerritos, CA	360,000 SF
» Stadium Plaza Business Park	Anaheim, CA	806,000 SF

EXPERIENCE

- 2016 ~ Associate, Lee & Associates - Central Coast - San Luis Obispo, CA
- 2014 ~ 2016: Owner, Allen Commercial - Shell Beach, CA
- 2009 ~ 2014: General Manager - Transwestern Investment Group - Anaheim, CA
- 2000 ~ 2009: District Manager - RREEF Management - Walnut, CA
- 1998 ~ 2000: Building Manager - Spieker Properties - Cerritos, CA

EDUCATION

- Bachelor of Science, California Polytechnic State University, San Luis Obispo

PERSONAL

Jeff recently moved with his son from Orange County to Pismo Beach. In his spare time, he enjoys body surfing, hiking, walking his dog, and training in Catch Wrestling.

Professional References

Please feel free to reach out to the individuals below whom we previously worked with. They can attest to the value we add to a property whether you consider making a change in leasing, or selling your asset.

MARTY INDVIK:

- » **Hamish Marshall**
President, Auzco Development:
hamish@auzcodev.com
Represented on several purchases of commercial properties and leasing assignments.
- » **Rudy Bachmann**
President, Specialty Construction:
bachmann@specialtyconstruction.com
Represented on sales and leasing of commercial properties in San Luis County.
- » **John Stevens**
Wells Fargo, National Association:
ORE Asset Manager Credit Management Group
john.stevens@wellsfargo.com
Represented on sales on several REO properties in San Luis Obispo County.
- » **Scot Arjun**
scot.s.arjun@gmail.com
Currently represent on sale on 12.5 acre development site.

JEFF ALLEN:

- » **Anthony Delorenzo,**
Senior Vice President, CBRE:
anthony.delorenzo@cbre.com
Partnered with CBRE in representing Deutsche Bank on the sale of a \$21.5M property.
- » **Mike Kent**
Former Head of U.S. Asset Management for RREEF Management:
mike.kent@goodman.com
Represented RREEF in the leasing of a 200K SF Business Park in Walnut, CA
- » **Scott Davis**
Vice President, Deutsche Bank:
Scott.davis@db.com
Represented Deutsche Bank on leasing of three commercial real estate projects in Brea and Fullerton.
- » **Dan Floriani,**
Co-Founder/Partner, Pacific Industrial:
(Former Project Manager at Spieker Properties)
danf@pac-industrial.com
Represented Spieker Properties in office and industrial transactions in Los Angeles and Orange County.

Marty Indvik

Principal
805.782.9000 x17 | Lic# 0961882
mindvik@lee-associates.com

Jeff Allen

Broker Associate
805.782.9000 x20 | Lic# 01313074
jallen@lee-associates.com

Lee & Associates - Central Coast Coast

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1233 FAIRWAY DRIVE
SANTA MARIA

4.23 ACRES

2238 BROAD STREET
SAN LUIS OBISPO



1.12 ACRES

1101 MONTEREY STREET
SAN LUIS OBISPO

7 ACRES

LOS OSOS VALLEY ROAD
SAN LUIS OBISPO



16.5 ACRES

3300 RAMADA ROAD
PASO ROBLES

4.8 ACRES



E. HIGHWAY 246
LOMPOC

328 ACRES

345 STIMSON AVENUE
PISMO BEACH

33 ACRES

2201 EMILY STREET
SAN LUIS OBISPO

2.73 ACRES

2120 CIENEGA STREET
OCEANO

1.19 ACRES

57

offices
and growing
nationwide

\$12+ billion

transaction volume
2015

850

agents
and growing
nationwide

**LOCAL EXPERTISE.
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At Lee & Associates® our reach is national but our expertise is local market implementation. This translates into seamless, consistent execution and value driven market-to-market services.

Our agents understand real estate and accountability. They provide an integrated approach to leasing, operational efficiencies, capital markets, property management, valuation, disposition, development, research and consulting.

We are creative strategists who provide value and custom solutions, enabling our clients to make profitable decisions.

**OFFICE
INDUSTRIAL
RETAIL
INVESTMENT
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MULTI-FAMILY
LAND
PROPERTY MANAGEMENT
VALUATION & CONSULTING**



NATIONWIDE LOCATIONS

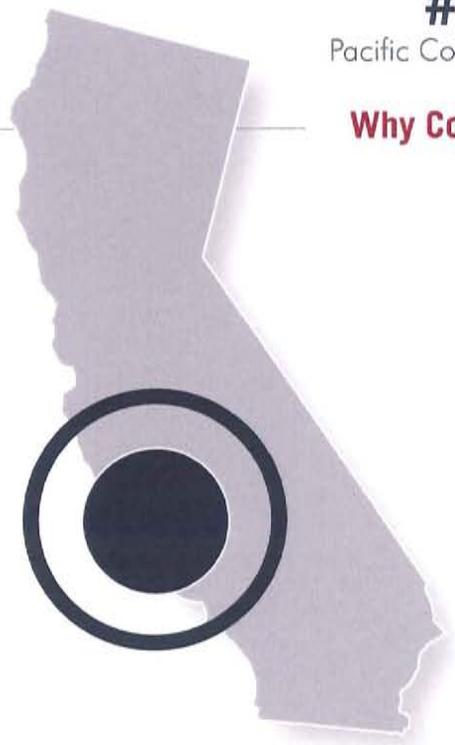
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- Las Vegas, NV · Phoenix, AZ · Carlsbad, CA · Industry, CA · Los Angeles, CA · Riverside, CA · Ontario, CA · Newport Beach, CA
- Orange, CA · Irvine, CA · Vancouver, CANADA

LEE & ASSOCIATES TRI-COUNTIES

3 offices within the tri-counties
\$350 M transaction volume 2015
15 brokers and growing

1 CRE BROKERAGE

Pacific Coast Business Times for 2013, 2014 and 2015



Why Companies Prefer To Partner With Us...

- MARKET LEADER.**
SPECIALIZING IN MARKET INTELLIGENCE
- LOCAL EXPERTISE.**
SEASONED AGENTS WITH RELEVANT TRANSACTION EXPERIENCE
- ABILITY TO UNDERSTAND.**
EFFECTIVE CLIENT COMMUNICATION AND CREATIVE PROBLEM SOLVING
- QUANTIFIABLE RESULTS.**
OUR GOAL IS TO HELP OUR CLIENTS ACHIEVE THEIR GOALS
- INTEGRITY.**
SHAPES OUR CULTURE & CHARACTER OF OUR COMPANY

SPECIALITES

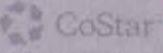
- industrial
- office
- retail
- multi-family
- investments

Pulse on the Market »



Where we market your property...

SAMPLE MARKETING

- 1 **COMPREHENSIVE MARKETING PACKAGE**
PREPARE ATTRACTIVE MARKETING BROCHURE FOR EXTENSIVE DISTRIBUTION
 - Marketing Your Property
- 2 **MULTI-MEDIA APPROACH.**  TARGETED E-MAIL CAMPAIGNS, DIRECT MAILERS, COLD CALLS, MULTIMEDIA SERVICE (M/S), COSTAR AND VARIOUS OTHER OUTLETS
 - Sample - Property Brochure
 - Sample - Property Website
- 3 **WEB PRESENCE.**
PROPERTY WILL BE FEATURED ON OUR LEE & ASSOCIATES MICROSITE, AS WELL AS NATIONAL PLATFORM
 - Sample - Email Campaign
- 4 **SIGNAGE.**
INSTALL APPROPRIATE SIGNAGE ON PROPERTY
- 5 **LOOPNET.** 
PROPERTY ADVERTISED AS PREMIUM LISTING
- 6 **NETWORK.**
UTILIZE EXCLUSIVE NETWORK TO ATTRACT INTERESTED BUYERS
- 7 **ADVERTISE.**
PLACEMENT IN LOCAL AND/OR REGIONAL PRINT AND DIGITAL PUBLICATIONS

• SAMPLE SIGNAGE •

• SAMPLE FLYER •

• SAMPLE POSTCARD •

• SAMPLE WEBSITE •



AVAILABLE
805 782-9000
lee-associates.com



Where we market your property...

- ① **COMPREHENSIVE MARKETING PACKAGE.**
PREPARE ATTRACTIVE MARKETING BROCHURE FOR EXTENSIVE DISTRIBUTION
- ② **MULTI-MEDIA APPROACH.**
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PLACEMENT IN LOCAL AND/OR REGIONAL PRINT AND DIGITAL PUBLICATIONS

• SAMPLE SIGNAGE • • SAMPLE FLYER • • SAMPLE POSTCARD • • SAMPLE WEBSITE •

LEE & ASSOCIATES[®]
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THE MARC
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MIRAMAR, CA 92550

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LEE & ASSOCIATES
COMMERCIAL REAL ESTATE SERVICES

**YOUR PROPERTY HERE
TIME TO SELL?**

PENDING

SOLD

LEE & ASSOCIATES
COMMERCIAL REAL ESTATE SERVICES

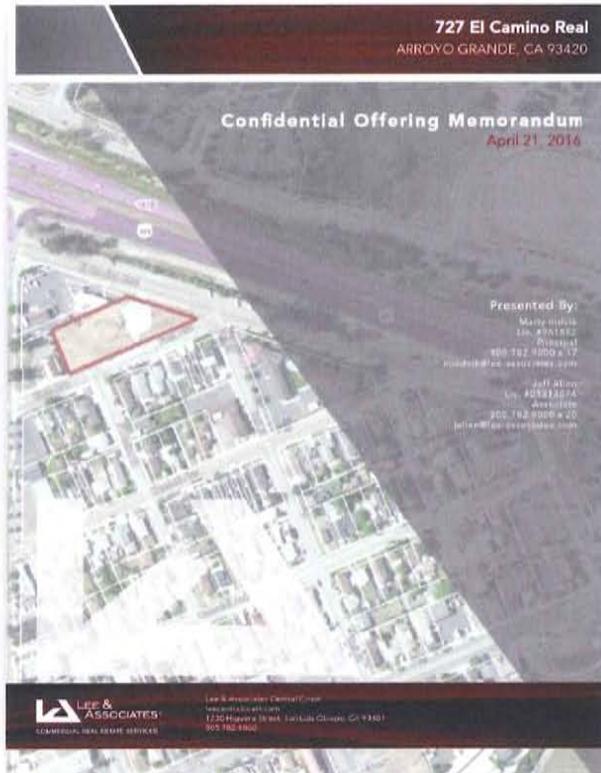
LEE & ASSOCIATES
COMMERCIAL REAL ESTATE SERVICES

LOCAL EXPERTS. NATIONAL REACH. WORLD CLASS.

RECENT SALES

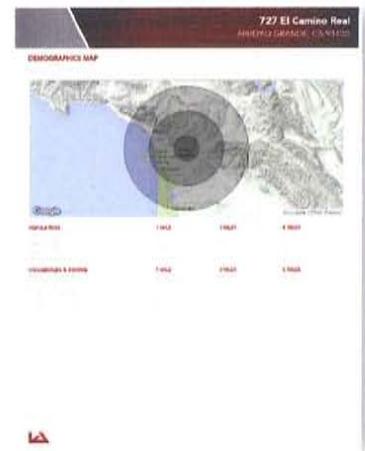
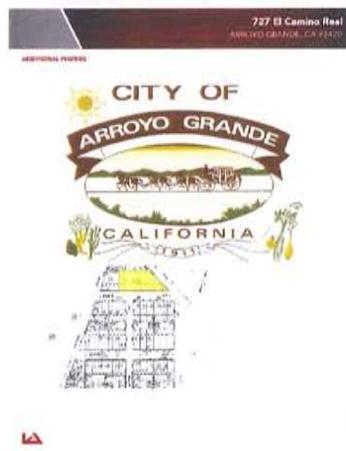
Property Address	Price	Sold Date	Days on Market
10000 MARC BLVD, MIRAMAR, CA 92550	\$1,200,000	10/15/2023	45
10000 MARC BLVD, MIRAMAR, CA 92550	\$1,200,000	10/15/2023	45
10000 MARC BLVD, MIRAMAR, CA 92550	\$1,200,000	10/15/2023	45

SECTION 5 - Sample - Property Brochure



Marketing Packages

Our in-house marketing department creates a full-color Property Brochure. The Property Brochure contains all the comprehensive offering details and property information necessary for interested buyers to submit a qualified offer on the property. The marketing materials are distributed in hard-copy and digital format to a multitude of qualified buyers.

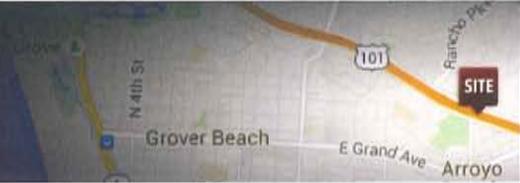


SECTION 5 - Sample - Property Website



Land For Sale

727 EL CAMINO REAL
ARROYO GRANDE, CA 93420



OVERVIEW PHOTOS VIEW ON MAP

Sale Overview

[VIEW ALL](#) [1/3 PHOTOS](#)

PRICE: Subject To Offer
 PROPERTY TYPE: Land
 LOT SIZE: 0.83 acres

< >

Description

Vacant parcel. Located at Faeh Avenue. APN: 006-151-027 consisting of 0.83 acre, (36,250 sq. ft.) of vacant land. Area minus public improvements is 0.79 acres, (34,630 sq. ft.).

[Contact Us](#)

Marty Indvik
 Principal
mindvik@lee-associates.com
 805 782-9000 x 17

Jeff Allen
 Associate
jallen@lee-associates.com
 805 782-9000 x 20

SECTION 5 - Sample - Email Campaign

For Sale | 727 El Camino Real | Lee & Associates (Central Coast) | Featured Listing



LEE & ASSOCIATES
COMMERCIAL REAL ESTATE SERVICES

Marty Indvik | mindvik@lee-associates.com
Jeff Allen | jallen@lee-associates.com

727 El Camino Real | Arroyo Grande, CA 93420

Price: Subject To Offer
Lot Size: 0.83 acres
Zoning: Highway Mixed Use

[View Full Listing](#)

Highlights & Location

Highlights & Location

[View Full Map](#)

Additional Photos




For more information contact:



MARTY INDVIK
mindvik@lee-associates.com
(O) 805.782.9000 x.17
(F) 805.782.9211

[f](#) [t](#) [in](#)



JEFF ALLEN
jallen@lee-associates.com
(O) 805.782.9000 x.20
(F) 805.782.9211

[f](#) [t](#) [in](#)



LEE & ASSOCIATES
COMMERCIAL REAL ESTATE SERVICES

1230 Higuera Street,
San Luis Obispo, CA 93401
lee-centralcoast.com

The information contained herein has been obtained from the owner of the property or from other sources deemed reliable. While we believe the data to be accurate, we do not guarantee it.



**FOR
SALE**

727 El Camino Real
ARROYO GRANDE, CA 93420

Presented By:

Marty Indvik
Lic. #961882
Principal
805.782.9000 x 17
mindvik@lee-associates.com

Jeff Allen
Lic. #01313074
Associate
805.782.9000 x 20
jallen@lee-associates.com

 **LEE &
ASSOCIATES**
COMMERCIAL REAL ESTATE SERVICES

Lee & Associates Central Coast
leecentralcoast.com
1230 Higuera Street, San Luis Obispo, CA 93401
805.782.9000



April 25, 2016

City of Arroyo Grande
Debbie Malicoat
Director of Administrative Services
Real Estate Services RFP
300 East Branch Street
Arroyo Grande, CA 93420

RE: Response to RFP
Real Estate Brokerage Services for former Arroyo Grande Redevelopment Agency properties
APN# 006-151-027, and APN#007-462-001

Dear Ms. Malicoat

Enclosed you will find Triad's response to the above mentioned Request for Proposal. Triad Real Estate Group has experience in selling Residential Real Estate, Commercial, Mixed used, Vacant Land, Development projects, ground leases and New Home Sales..

Triad also works with Banking Institutions and Universities as a consultant in addition to marketing, researching and taking the project to completion.

Triad is interested in serving the City of Arroyo Grande's Real Estate needs in sales, consultation and advising on issues as needed.

We pride ourselves in creating lasting long term relationship with clients and providing outstanding service and professionalism to all parties.

Sincerely,

A handwritten signature in blue ink, appearing to read "Rodessa Newton", is written over a blue circular stamp.

Rodessa Newton
Broker/Owner
Triad Real Estate Group
rodessa@triadslo.com

2436 broad street
san luis obispo ca 93401
tel.805.544.5500
fax.805.544.5501

TABLE OF CONTENTS

RFP: REAL ESTATE BROKERAGE SERVICES

Section 1:	Background Information
Section 2:	Experience Summary
Section 3:	Marketing Methods
Section 4:	Additional Services
Section 5:	Fee Schedule
Section 6:	References
Section 7:	Conflict of Interest
Section 8:	Good Standing

SECTION 1
BACKGROUND INFORMATION

BACKGROUND INFORMATION

Triad Real Estate Group "Triad" is located in the City of San Luis Obispo. Triad and its staff are dedicated to volunteering, donating and committing their time by giving back to their community and clients. Some of our favorite's organizations are Habitat for Humanity, The Performing Arts Center, Big Brothers/Big Sisters, Womenade and supporting our local Elementary Schools by volunteering and sponsorships.

Triad and its staff have experience in the following areas:

- New Home Sales
- Commercial and Residential Resale's
- Vacant Land
- Leasing
- Foreclosure Services
- New Construction Estimating & Build Out
- Development Projects

Triad takes pride in building strong, long-term relationships through successful real estate transactions and client consultation. Triad's expertise, excellent service standards and extensive network of seasoned professionals sets us apart from other companies.

Triad Organization

- Our staff is comprised of 3 licensed Real Estate Brokers, 10 licensed Sales Agents, and a licensed general contractor.
- Mandatory attendance in Company provided training dealing with conflict resolution, fair housing, and cultural sensitivity-awareness
- Foreclosure Processing for banks and private parties
- Staff has over 60 years' experience in the Real Estate Industry
- We offer our services all over California but primarily throughout San Luis Obispo and Santa Barbara Counties.

Designations & Certifications:

- California Real Estate Broker
- CSP: Certified Short Sale Professional
- GRI: Graduate Realtor Institute
- SRES: Seniors Real Estate Specialist
- E-PRO: Online Real Estate

Association Memberships

- National Association of Realtors
- California Association of Realtors
- San Luis Obispo Association of REALTORS
- Women's Council of Realtors
- SLO Chamber of Commerce
- Previous Board of Director of the San Luis Obispo Association of Realtors
- Previous Public Relations Chairperson for the San Luis Obispo Association of Realtors
- Board of Director of San Luis Obispo Downtown Association



Rodessa Newton – Broker/Owner

Rodessa Newton is the Broker/Owner of Triad Real Estate Group. She is a San Luis Obispo County Native and a graduate of Cal Poly University. Rodessa is a member of the Women's Council of Realtors, National Association of Realtors, California Association of Realtors, the SLO Chamber of Commerce, previously Board Member of the San Luis Obispo Association of Realtors, previous Board of Directors liaison for American Perspective Bank as a shareholder. Current Board Member of the San Luis Obispo Downtown Association. She provides the full spectrum of Real Estate services including Residential & Commercial Sales both Retail and Wholesale, Construction Estimating & Build out, Foreclosure Processing, & Real Property Personalized Investment Portfolios. Having grown up in San Luis Obispo County enables her to give her clients more local knowledge, as she is familiar with all of our countywide real estate markets. Rodessa is very well networked within the community and enjoys meeting the needs of her clients. Some of the career achievements that Rodessa has made include receiving her Brokers License, which gives her a higher level of education in all aspects of the industry. Rodessa's involvement in the community includes contributing to the Performing Arts Center, Womenade, Women's shelter, member of the Los Ranchos School Site Council, Board of Director's for the San Luis Association of Realtors and various other organizations. Rodessa is proud to have such professional and knowledgeable agents who take pride in building strong, long term relationships with the highest standards and personal commitment to their clients.

SECTION 2
EXPERIENCE SUMMARY

EXPERIENCE SUMMARY

Triad Real Estate Group is a full service Professional Real Estate Brokerage covering all of California while focusing on the Central Coast. We work in all aspects of the real estate industry including Residential, Commercial, Land, Income Property and Development. We have an experienced team of Real Estate Brokers, Transaction Coordinators, Contractors, Short Sale and REO Specialists ready to assist.

Rodessa provides the full spectrum of Real Estate services including Residential & Commercial Sales both Retail and Wholesale, Construction Estimating & Build out, Foreclosure Processing, & Real Property Personalized Investment Portfolios. Having grown up in San Luis Obispo County enables her to give her clients more local knowledge, as she is familiar with all of our countywide real estate markets. Rodessa is very well networked within the community and enjoys meeting the needs of her clients. Some of the career achievements that Rodessa has made include receiving her Brokers License, which gives her a higher level of education in all aspects of the industry. She has received her e-PRO designation which recognizes her as a leader in the practice of Online Real Estate. Rodessa is a Graduate of the Real Estate Institute which is one of the most comprehensive educational programs for Realtors in the nation which sets her apart from other Realtors. Other certifications include a Seniors Real Estate Specialist (S.R.E.S.) helping seniors understand capital gains & estate tax implications of selling, a Certified Short Sale Professional (CSP) a Certified Distressed Property Expert (CDPE). Rodessa is proud to have such professional and knowledgeable agents who take pride in building strong, long term relationships with the highest standards and personal commitment to their clients.

SECTION 3

MARKETING METHODS

Marketing Methods

Triad will identify target user groups by means of way of an array of past clients, known developers, buyers that are familiar with these type of projects and also the general public

Other means of marketing would be advertising in the Builders Exchange, online and marketing to specific groups of builders. The property would be put on the MLS, also on LoopNet, social media and numerous other real estate outlets.

Site maps and general summary of the property and uses will be provided to the buyers.

SECTION 4

ADDITIONAL SERVICES

Additional Services

Triad's additional services include consultation, construction estimating and build out. Triad and owner Rodessa Newton has personal experience with City Councils', Planning Commissions workings and Development experience in Residential and Commercial Real Estate.

Section 5

FEE SCHEDULE

Fee Schedule

- A) The compensation proposed is based upon the sale of one and/or both of the proposed properties:
 - A professional fee of 5% percent commission of the gross sale for listing and selling of properties and for advising on miscellaneous real property matters
 - Triad proposes to collect the professional fee directly from sale escrow.
 - 2.5% percent commission will go to the listing brokerage firm and 2.5% percent will go to the selling brokerage firm.

- B) A professional fee compensation of 2.5% percent will be charged for the purchase of properties. Usually the compensation is paid by the selling brokerage firm through escrow or invoicing.

- C) Services requested by Successor Agency/City of Arroyo Grande that are outside of these properties or scope of work will be billed as follows;
 - Triad Principals.....\$150.00/hr
 - Triad Sales Staff.....\$75.00/hr
 - Triad Clerical Staff.....\$50.00/hr

Triad shall be reimbursed for incidental expenses incurred at actual cost. Reimbursable expenses include, but are not limited to, office supplies, reproductions, postage, telephone communications, and marketing materials.

- D) Carry over compensation shall be the same as item a. if the agreement expires.

Section 6

REFERENCES

References

The University of California Santa Barbara

Rosemary Peterson
Executive Director
UCSB Community Housing Authority
rosmary.peterson@ucsb.edu

Specific Services:

- New Homes Sales-showing model homes, educating buyers on sales process, writing contracts, handling the escrow process and closings.
- Design Consultation with Architects
- Working with Faculty in educating them on ground leases and the purchasing process

Pacific Western Bank

Paul White
Vice President
Pacific Western Bank
pwhite@pacificwesternbank.com

- Listed the banks real estate owned assets
- Researching development projects for them
- Meeting with city and county officials to determine where the projects stood as far as fees, entitlements, permits and zoning.
- Worked with attorneys and lienholder to remove mechanics liens and judgements in order to clear cloud on title so the bank could sell their properties.

Fidelity National Title

Jean Balsz
Escrow officer, Assistant Vice President
Systems Integration Specialist
Jean.balsz@fnf.com

Coordination escrow paperwork and real estate transactions. Working to clear title with several lienholders on many difficult properties including investors. Finding solutions to complex transactions. Meeting demanding timelines for all parties involved.



COMMUNITY
HOUSING
AUTHORITY

UCSB Community Housing Authority
1325 Cheadle Hall, MC-2032
Santa Barbara, CA 93106

April 25, 2016

TO: Whom It May Concern

RE: Triad Real Estate
Rodessa Newton, Principal/Broker

To Whom It May Concern:

Through an RFP process, Triad Real Estate was selected by the Community Housing Authority (for the University of California, Santa Barbara) to provide real estate brokerage services and to undertake full responsibility for the various aspects of the marketing and sales for the University's faculty and staff housing program. Triad Real Estate provided services including the co-development of marketing materials, recommendation of pricing and strategies to the Community Housing Authority Board, administering the marketing activities, educating and working with potential buyers (including first time buyers), financing qualifications assistance, open houses and showings, offer agreements and purchase transactions, escrow coordination, and closing activities, in addition to overall program coordination and DRE agency requirements.

To date, Rodessa Newton and Triad Real Estate have conducted over fifty real estate transactions for UCSB and she continues to bring excellence, knowledge and experience to our program. We consider her an invaluable part of our team and we recently extended her contract for the sales of our new residential community. She is personally involved in every aspect of her business and her dedication to her work shows. She is very easy to work with and has dealt well with our most demanding clients/buyers.

Please do not hesitate to contact our office if you have any questions.

Sincerely,

Rose Peterson

Rose Peterson
Executive Director
UCSB Community Housing Authority
rosemary.peterson@ucsb.edu
805.893.3187 office
310.738.6455 mobile



City of Arroyo Grande
300 E. Branch St.
Arroyo Grande, CA 93420

April 25, 2016

RE: Letter of Recommendation – Rodessa Newton

To whom it may concern:

I have had the privilege to be associated with Rodessa Newton and Triad Real Estate for over 5 years in various capacities. Generally, Rodessa has provided assistance in listing Bank real estate owned (REO) for sale and helping facilitate transaction closings. However; Rodessa has always gone above and beyond the general expected realtor service requested.

Rodessa has always been willing to show property, even at inconvenient times. She has represented the Bank in visiting City and County planning and public works departments to research entitlements and code issues. Rodessa has been extremely supportive in helping us secure property and ensuring proper compliance with code standards.

We have sold several properties with Rodessa and her ability to determine the right listing price has proven extremely helpful in recovering as much as investment as possible. Even when the real estate market was under performing, Rodessa was still able to get the Bank top dollar prices on difficult assets to sell.

Overall, Rodessa has proven to be extremely important over the past 5 years to helping the Bank achieve our goals with regards to selling REO assets and I would recommend her to anyone looking for a strong realtor who will represent them with integrity and professionalism.

Best Regards,

Paul White

Vice President

Date: April 25, 2016

To Whom It May Concern,

I have had the distinct pleasure of working with Rodessa Newton at Triad Real Estate Group for close to a decade, and her integrity, professionalism, knowledge and technical ability have always been of the highest caliber.

She has been a tremendous resource for both Sellers and Buyers; and she has a keen grasp of the unique complexities that can be involved in a real estate transaction here on the Central Coast. Troubleshooting and conflict resolution are two of Rodessa's greatest strengths; and her ability to close the most complicated arrangement under high pressure is something in which she excels. She consistently performs as one of the most successful agents I work with as an Escrow Officer, and it is always a pleasure to discover she and her team are representing a client -- there is no doubt the closing will run more smoothly for it.

Most sincerely,



Jean Balsz
Escrow Officer, Assistant Vice-President
Systems Integration Specialist
Fidelity National Title Company
jean.balsz@fnf.com

jb

Section 7

CONFLICT OF INTEREST

Conflict of Interest

Triad Real Estate Group and owner Rodessa Newton does not currently or does not foresee any conflict of interest that would not serve the City of Arroyo Grande in their best interest.

Section 8

GOOD STANDING

Good Standing

Triad Real Estate Group and Broker/Owner Rodessa Newton is in good standing with the Bureau of Real Estate, IRS and Franchise Tax Board, and Corporate registration status.



REAL ESTATE SERVICES ERRORS & OMISSIONS INSURANCE

PART 1.

DECLARATIONS PAGE

1. **Named Insured / Address:**
 Corporation: Triad Real Estate Group, Inc.
 Po Box 3260
 San Luis Obispo, CA 93403
 Policy Number: QCR-3025068-01
2. **Policy Period:** From 09/01/2015 to 09/01/2016 (12:01 AM at address #1)
3. **Retroactive Date:** Real Estate 07/01/2009
4. **Insured Services:**
 Brokerage of residential real estate, meaning 1-4 residential units
 Brokerage of raw, vacant and partially developed land
 Brokerage of commercial real estate, including 5+ residential units
 Referrals/broker price opinions
5. **Limit of Liability:**
- | | |
|-----------------------------|-----------------|
| a. Each Wrongful Act | \$1,000,000 |
| b. Aggregate | \$1,000,000 |
| c. Discrimination | \$1,000,000 |
| d. Lockbox | To Policy Limit |
| e. Contingent Bodily Injury | None |
6. **Retention:** \$2,500 (see endorsements for reductions / enhancements)
7. **Premium:** \$2,846.00



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
04/25/2016

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 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).

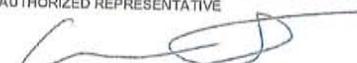
PRODUCER Peterson & Grantham Insurance Brokers 3005 Douglas Blvd. Suite 140 Roseville, CA 95661 License #: 0G05786	CONTACT NAME: Arrow Grantham		
	PHONE (A/C, No, Ext): (916)431-0400	FAX (A/C, No): (916)431-0246	
	E-MAIL ADDRESS: arrow@pngins.com		
INSURED Triad Real Estate Group Inc. 2436 Broad St San Luis Obispo, CA 93401	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: The Hartford - Commercial Lines		11000
	INSURER B: The Hartford - Commercial Lines		30104
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

COVERAGES CERTIFICATE NUMBER: 00000000-92296 REVISION NUMBER: 2

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.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD 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 checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y Y	57SBABG5577	06/01/2015	06/01/2017	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
							\$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS		57SBABG5577	06/01/2015	06/01/2017	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
						BODILY INJURY (Per person)	\$
						BODILY INJURY (Per accident)	\$
						PROPERTY DAMAGE (Per accident)	\$
							\$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE	\$
						AGGREGATE	\$
							\$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	57WECGE8712	05/01/2015	05/01/2017	<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

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
the City and all of its officials, employees and agents are additional insureds

CERTIFICATE HOLDER City of Arroyo Grande 300 E Branch St Arroyo Grande, CA 93420	CANCELLATION 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  (AMG)

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