



MARKETING · SALES OPERATIONS · TECHNOLOGY

From First Inquiry to Final Closing.

A partnership proposal to serve as the in-house marketing, sales-operations and technology team for **Oceano Breeze**, a planned 100-residence gated oceanfront community in Vega Baja, Puerto Rico.

Prepared for: [Developer / ownership group]

Vega Baja · Puerto Rico

Phases 2027-2029

100

RESIDENCES PLANNED

3

RELEASE PHASES

21

PHASE 1 TOWN HOMES

1

ACCOUNTABLE PARTNER

Project figures are taken from the developer's Oceano Breeze presale deck (August 2026) and should be confirmed by the developer. This proposal does not make representations about pricing, returns, tax treatment or sales results.

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— Sources · One-page executive summary
(separate)

HOW TO READ THIS PROPOSAL

SOURCED

Market facts carry a numbered citation [n] that links to the source on the Sources page.

ASSUMPTION

Anything we have assumed, estimated or recommended is labeled. Illustrations are not forecasts.

PLACEHOLDER

[Bracketed fields] mark information the developer should supply before final pricing and targets.



Rendering from the developer's Oceano Breeze presale materials. Positioning in this proposal uses Puerto Rico's established luxury resort communities, such as Dorado Beach, only as a quality reference; Oceano Breeze is not affiliated with them.

01 · EXECUTIVE SUMMARY

One Partner Accountable for Demand, Follow-Up and Closings

Oceano Breeze is planned as 100 residences released in three phases between 2027 and 2029, beginning with 21 Phase 1 town homes presale-priced from \$885,000 (developer materials). Selling a phased, pre-construction community is not one campaign. It is a 30-plus-month pipeline in which buyers must be found early, educated patiently, followed up quickly and carried through reservation, contract, construction and closing.

The opportunity

Puerto Rico's luxury market has momentum and visibility: record Dorado Beach contracts of about \$33M and \$40M were reported in October 2025^[1], San Juan's airport handled a record 13.6M passengers in 2025^[2], and island hotel occupancy reached 70.7% through November 2025^[3]. Oceano Breeze can introduce a newer, more accessible north-coast option nine miles from Dorado (developer materials), but there is no established luxury comparable in Vega Baja yet^[4], so the project's story must be built, proven and told consistently.

The problem we solve

Developers typically assemble a brand agency, a web vendor, a media buyer, a CRM consultant, event planners and brokers, then reconcile their reports by hand. Leads wait, follow-up varies, and no one can show which dollar produced which reservation. Fragmentation is most expensive before opening, when every qualified buyer matters most.

What we propose

Island Developer Partnership becomes the development's in-house **marketing, sales-operations and technology team**: one accountable partner that builds the brand, generates and qualifies demand, runs the CRM and follow-up, hosts private previews and discovery visits, and reports every stage from first inquiry to closing. Licensed brokers continue to handle regulated brokerage activities; counsel, architects and the construction team keep their roles (Section 09).

START BEFORE OPENING

Buyer acquisition should begin now, ahead of construction milestones, so that a qualified, educated list exists when each phase is released. Early demand also produces the buyer feedback that should shape pricing, finishes and phase sequencing.

HOLD MOMENTUM

Most of the value is lost between interest and contract. We keep buyers engaged through reservation, contract, deposit and construction with structured follow-up, updates and on-island experiences.

PROVE EVERY DOLLAR

A single CRM and attribution model connects marketing spend to inquiries, meetings, visits, reservations and closings, so the developer can move budget toward what actually sells.

OUR RECOMMENDATION

Begin with a 4–6 week discovery and foundation sprint (brand narrative, CRM, website, buyer-qualification process, compliance review of claims), then launch Phase 1 demand generation and private previews, scaling spend only as conversion data proves which channels work. We do not promise a sales pace; we commit to building the system, reporting honestly and optimizing toward outcomes the developer defines.

02 · THE PARTNERSHIP ADVANTAGE

Executive Leadership That Has Done This Before

Luxury development is won or lost on relationships, sales operations and execution. Our team has led those functions on the ground in the Caribbean, and pairs them with the technology and data to scale them.

EXECUTIVE DIRECTOR

Krystalore Crews, MBA

Executive Director · Caribbean Luxury Real Estate Development & Strategic Partnerships

Krystalore brings direct, hands-on experience leading luxury real estate development in the Caribbean. In Roatán, Honduras, she assisted in **investor relations, sales strategy, on-site operations and project management** for a luxury real estate development, coordinating stakeholders and aligning strategic objectives with day-to-day execution.

A **22-year U.S. Air Force veteran**, Krystalore brings extensive experience in executive leadership, project management, communications, and organizational transformation. Her work spans leadership consulting, executive coaching, nonprofit leadership, global retreats, and large-scale events, uniting strategic planning with engaging experiences that move people to action. At the Pentagon, she **created and led a train-the-trainer program for more than 250 change agents**, equipping leaders to drive meaningful change. Across every role, she brings the energy, presence, and operational expertise to turn big ideas into lasting impact.^[5]

Having called Puerto Rico home for the past three years, she combines firsthand Caribbean development expertise with a personal connection to the island's lifestyle, culture and communities. This combination positions her to help Oceano Breeze navigate the complexities of luxury development while creating a seamless experience for investors, prospective buyers, development partners and future residents.



Luxury Development & Project Management

Direct Caribbean development leadership and on-site operations.

Investor Relations & Sales Strategy

Investor engagement, relationship management and sales operations.

Executive Leadership & Strategic Communications

Military and government contracting, Pentagon organizational transformation and stakeholder coordination.

Destination Marketing & Community Engagement

Puerto Rico residency, international experiences and island-wide events reaching 2,000+ people.

GROWTH & TECHNOLOGY ARCHITECT

Jeff Cline

Growth & Technology Architect · Founder, R0cketShip and VRTCLS

- Serial entrepreneur: has launched dozens of companies, with multiple exits
- 25+ years of business development and scale growth
- Built 1-800-MEDIGAP's consumer program to 35,000+ inbound calls with known unit economics
- Architect of the Predictive Data demand engine: intent data, CRM, routing and attribution

THE UNIQUE PROPOSITION

R0cketShip × Predictive Data

Predictive audiences and demand infrastructure

- Predictive audience modeling and intent signals to find likely buyers early
- Visitor re-engagement, where consent and law allow
- Investor Discovery Tour hosted, qualified on-island visits^[7]

Role: feeds the pipeline with prioritized, consented prospects and reactivates past interest, so paid media is not the only source of demand.

02 · THE PARTNERSHIP ADVANTAGE · TRACK RECORD

Proven on the Ground, Not Just on Paper

We have already run the functions Oceano Breeze is looking to outsource: investor relations, sales strategy, on-site operations and project management, backed by growth experience across dozens of companies.

FEATURED

ROATÁN, HONDURAS

Roatán Caribbean Living

Jeff Cline, Krystalore Crews, and their team brought big ideas to life through strategic partnerships, investor relations, sales strategy, and on-site project execution. From leveraging predictive technology to identify high-intent investors and hosting biweekly investor experiences to activating public-private partnerships, the team connected vision with measurable action.

Their work included orchestrating a four-day, island-wide event engaging over 2,000 people, bringing together nonprofits, businesses, and sponsors in just three weeks.

One team. Bold vision. Real-world impact.

THE PENTAGON · U.S. AIR FORCE

Organizational transformation

A 22-year Air Force veteran, Krystalore created and led a Pentagon train-the-trainer program for more than 250 change agents, equipping leaders to drive meaningful change.

WORLDWIDE

Global retreats & large-scale events

Leadership consulting, executive coaching, nonprofit leadership, global retreats and large-scale events that unite strategic planning with experiences that move people to action.

TEXAS

50-acre multifamily community

Our team developed 50 acres into a multifamily community.

PUERTO RICO

One-for-many, already running

Retreats.plus, Cruise.plus, CrewPerk and our retreats — one-for-many platforms built and running in Puerto Rico on one proprietary technology stack.

GROWTH & EXITS

Dozens of companies launched

The team has launched dozens of companies with multiple exits, and built a consumer program to 35,000+ inbound calls.

WHAT THIS MEANS FOR THE DEVELOPER

- ♦ **One executive lead** who has managed investors, sales teams, operations and contractors on a Caribbean development
- ♦ **Stakeholder fluency:** public communications and multi-party coordination
- ♦ **Change leadership at scale:** training teams and partners so the program runs consistently

“Luxury buyers do not respond to more noise. They respond to the right invitation, a fast and informed answer, and an experience that makes the place feel like theirs.”

03 · PROJECT POSITIONING

A Premium North-Coast Position, Validated Before It Is Published

Dorado Beach sets the quality reference for Puerto Rico's north coast, with most luxury communities on the island trading in the \$3M–\$20M range^[1]. Oceano Breeze's opportunity is different and complementary: a newer, gated, amenitized community at a more accessible entry point, close to Dorado yet rooted in an authentic beach town. The framework below lists concepts to validate with the developer; none should be published until confirmed.

PILLAR	CONCEPT TO VALIDATE	WHAT THE DEVELOPER SHOULD CONFIRM
Lifestyle	Private, gated, beach-oriented living with resort-style shared amenities; a calm alternative to busier resort corridors.	Daily life on site; HOA services; rules for rentals and guests.
Design	Contemporary town homes with rooftop outdoor living and high-end finishes (developer materials).	Architect, finish schedule, options pricing, renderings vs. built product.
Location	Vega Baja's coastline and natural landmarks; proximity to Dorado and San Juan via PR-22 ^[8] .	Exact drive times, beach access path, what is on vs. near the property.
Ownership	Fee-simple homes in a U.S. jurisdiction, transacted in U.S. dollars.	Title structure, HOA governance, deposit and escrow terms.
Services	Gated entry and controlled access (developer materials); optional concierge or home-watch partners.	Which services exist at launch vs. later phases.
Amenities	Pool complex with heated spas and cabanas, gym, pickleball, beach cabanas and storage (developer materials).	Delivery timing by phase; renderings permitted in ads.
Access	SJU's broad nonstop network; JetBlue alone serves 22 nonstop destinations from San Juan ^[9] .	Airport transfer offer for buyer visits; nearest services.

DRAFT BRAND PROMISE · FOR REVIEW

“Your private stretch of Puerto Rico's north coast: a gated, oceanfront community where home feels like a resort, and the island feels like home.”

DRAFT PROJECT DESCRIPTION · FOR REVIEW

Oceano Breeze is a master-planned, gated community of 100 residences on Puerto Rico's north coast in Vega Baja, minutes from the beach and a short drive to Dorado and San Juan. Phase 1 introduces 21 contemporary town homes with rooftop terraces and resort-style shared amenities, including a pool complex, fitness and pickleball, and private beach facilities.

[Confirm all details, delivery dates and amenity timing before use]

Note for the developer: the current presale deck places Poza las Mujeres-style natural pools in Vega Baja; Poza las Mujeres is in neighboring Manatí^[10]. We recommend phrasing location claims as “nearby” and verifying every landmark and distance before publication.

04 · TARGET BUYER SEGMENTS

Five Buyer Groups, Five Different Conversations

These are working hypotheses to test in the first 90 days, not market-size claims. Island-level data on luxury buyer origins is limited^[11]; segment weighting should come from the developer's existing inquiries and our early campaign data.

SEGMENT	LIKELY MOTIVATIONS	LIKELY CONCERNS	INFORMATION THEY NEED	BEST CHANNELS
Second-home buyers	A warm, easy-to-reach U.S. getaway; family time; a home that is ready when they arrive.	Hurricane resilience, insurance cost, upkeep while away, construction risk.	Floor plans, finishes, HOA services, insurance and flood-zone disclosures ^[12] , build timeline.	Search, retargeting, broker referrals, video tours, hosted visits.
Luxury relocators	Lifestyle change, climate, community; some evaluate Puerto Rico's Act 60 rules ^[13] .	Schools, healthcare, services, legal and tax complexity.	Area guide, drive times, services map; tax topics referred to their own advisors.	Relocation content, webinars, partner advisors, private previews.
Investors	Presale entry, diversification, potential future use.	Resale liquidity, rental rules, carrying costs.	Ownership terms, HOA rental policy, factual market data. No yield promises (Section 12).	Investor-network events, broker channels, targeted email.
Multigenerational families	Space for gatherings; a shared family base on the island.	Room counts, accessibility, safety, shared ownership logistics.	Layouts, rooftop and outdoor space, amenities for all ages.	Social video, community events, referrals.
Resort-lifestyle buyers	Amenities and a turnkey, managed feel without hotel rules.	Amenity timing, HOA fees, privacy.	Amenity schedule by phase, services, HOA budget.	Lifestyle content, influencer/press, preview events.
Diaspora & island buyers ADD	Return or a family base; Puerto Rico has 6.1M people of Puerto Rican origin in the U.S. states ^[14] .	Value relative to local alternatives.	Bilingual materials and financing guidance.	Spanish and English campaigns, community partners.

WHAT THE RESEARCH SAYS ABOUT HOW THEY SHOP

Among U.S. buyers, 46% began their search online, 52% found the home they bought online, and 88% used an agent; buyers rated photos (81%), property details (77%), floor plans (57%) and virtual tours (38%) as very useful^[15]. Coldwell Banker's luxury specialists report continued strength in cash purchases^[16]. Our implication: invest early in floor plans, video and a fast, well-informed human response, and build a strong broker channel.



05 · SCOPE OF WORK

Eight Functions, One Integrated Operation

1 · BRAND STRATEGY & PROJECT NARRATIVE

- ✦ Discovery workshops; positioning and messaging architecture
- ✦ Name, tagline and voice guidelines (English and Spanish)
- ✦ Claims library: every fact sourced and approved before use
- ✦ Phase-by-phase story that keeps later releases fresh

2 · WEBSITE, COLLATERAL & BUYER MATERIALS

- ✦ Developer-owned website with gated floor plans and inquiry capture
- ✦ Coordination of renderings, video, drone and photography
- ✦ Interactive floor-plan and finish presentations
- ✦ Buyer guide, FAQ, process and disclosure materials (counsel-reviewed)

3 · DIGITAL DEMAND GENERATION

- ✦ Search, paid social and programmatic/retargeting
- ✦ Predictive audiences and consented intent signals (Section 06)
- ✦ Email nurture and content: area guides, build updates, owner stories
- ✦ Answer-engine and search-engine optimization for organic discovery

4 · LUXURY BROKER & REFERRAL PARTNERS

- ✦ Broker program design with the developer's licensed broker of record
- ✦ Broker portal: inventory status, materials, registration and protection rules
- ✦ Broker previews and familiarization trips
- ✦ Referral program for owners and professional advisors, where permitted

5 · PREVIEWS, EVENTS, VIRTUAL PRESENTATIONS & VISITS

- ✦ Private VIP previews and founders' events, hosted by Krystalore Crews
- ✦ Investor Discovery Tour visits: itinerary, hosting, logistics
- ✦ Live and recorded virtual presentations for remote buyers
- ✦ Scheduled site visits with a consistent presentation

6 · LEAD RESPONSE, QUALIFICATION & PIPELINE

- ✦ Response standard: first touch within minutes during set hours
- ✦ Qualification on timing, budget, financing and fit
- ✦ Appointment setting for licensed sales staff or brokers
- ✦ Pipeline management and weekly pipeline review

7 · BUYER FEEDBACK & MARKET INTELLIGENCE

- ✦ Structured feedback after previews and visits
- ✦ Objection and lost-reason tracking in the CRM
- ✦ Competitive and pricing watch across north-coast communities
- ✦ Quarterly insight report to inform pricing and phase releases

8 · CLOSING COORDINATION & COMMUNITY

- ✦ Milestone communications from reservation through closing
- ✦ Coordination with the developer, lender, escrow and legal teams
- ✦ Construction-progress updates and owner onboarding
- ✦ Owner community programming and compliant referral engagement

Brokerage activities (negotiating price and terms, presenting offers, representing a party) remain with licensed professionals. Our team supports them with demand, qualification, scheduling, materials and data. Section 09 sets out the boundaries.

06 · TECHNOLOGY & PREDICTIVE MARKETING

A Practical Stack the Developer Owns

We recommend a straightforward architecture, built on established platforms where possible, with our predictive layer on top. Vendor choices are recommendations to confirm in discovery [developer preferences / existing systems].

CAPTURE

Website forms, gated floor plans, chat, event and tour registration

CALLS & TEXTS

Tracked numbers per channel; consent-based SMS

PAID & ORGANIC

Search, social, retargeting, email, SEO/answer engines

BROKERS & REFERRALS

Broker portal with registration and protection

DEVELOPER-OWNED CRM · SYSTEM OF RECORD

One record per buyer: source, consent, interactions, stage and documents.

ROUTING & FOLLOW-UP

Instant assignment, speed-to-lead alerts, automated email and text sequences, scheduling links.

PREDICTIVE LAYER

Audience models and intent signals score and prioritize prospects for outreach.

SCHEDULING

Meetings, virtual tours, site visits, previews

ANALYTICS

Web analytics, conversion tracking, call attribution

DASHBOARD

Monthly and live funnel reporting by channel and phase

HAND-OFFS

Broker, legal, escrow and closing status fields

HOW PREDICTIVE SIGNALS HELP

- ✦ **Prioritize:** score inquiries and audiences by fit and recent intent so people call the most promising buyers first.
- ✦ **Find look-alikes:** model new audiences on the profiles of qualified buyers and reservation holders.
- ✦ **Re-engage:** identify returning interest and trigger timely follow-up, within consent rules.
- ✦ **Reallocate:** shift budget toward channels whose leads progress to visits and reservations, not just clicks.

Predictive models improve with data; early-stage scores are directional and are validated against actual pipeline outcomes.

PRIVACY, CONSENT & DATA GOVERNANCE

- ✦ **Consent first:** documented express consent for calls and texts; honor opt-outs by any reasonable means within the required timeframes^[17]; CAN-SPAM-compliant email^[18].
- ✦ **Access controls:** role-based permissions, named users, audit trail, MFA.
- ✦ **Retention:** defined retention and deletion schedule approved by counsel; breach-response plan consistent with Puerto Rico law^[19].
- ✦ **Fair housing:** audience and ad choices reviewed so targeting does not express preferences based on protected classes^[20].

OWNERSHIP COMMITMENT

The developer owns its **domain, website, CRM records, advertising accounts, analytics, creative and all project data**. We operate them under delegated access, and everything transfers in full at the end of the engagement.

07 · SALES FUNNEL & PERFORMANCE DASHBOARD

Every Stage Measured, Activity Kept Separate from Outcomes

Awareness reach, engagement	Inquiry form, call, event	Qualified buyer fit, timing, budget	Meeting virtual or in person	Property visit preview, tour	Reservation signed, deposit	Contract executed	Deposit per schedule	Closing deed, funded
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ACTIVITY METRICS · ARE WE DOING THE WORK?

METRIC	DECISION IT INFORMS
Inquiries by source	Which channels deserve more or less budget
Speed to first response	Staffing and routing; response speed strongly affects contact rates ^[21]
Qualification rate	Targeting and message quality
Meetings and visits booked/held	Sales capacity and event calendar
Cost per qualified buyer	Media efficiency, before sales outcomes exist
Broker registrations and activity	Broker program health

OUTCOME METRICS · IS IT SELLING?

METRIC	DECISION IT INFORMS
Reservations and contracts (by phase and unit type)	Pricing, release timing, inventory mix
Stage-to-stage conversion	Where the funnel leaks and what to fix
Marketing cost per contract	True acquisition cost; budget for later phases
Sales cycle length	Cash-flow and construction planning
Cancellations and lost reasons	Product, pricing and objection handling
Closings and attributed source	Success-fee calculation; next-phase plan

REPORTING CADENCE

Live dashboard for the developer's leadership; **weekly** pipeline call (hot buyers, upcoming visits, blockers); **monthly** performance report (activity vs. outcomes, spend, recommendations); **quarterly** strategy and pricing review with buyer feedback.

WHAT WE WILL NOT DO

We will not promise an absorption or sales pace. A defensible pace requires confirmed pricing, inventory release, budget and at least one to two quarters of conversion data. Once that data exists, we will propose targets jointly with the developer and report against them openly.

08 · PHASED 12-MONTH LAUNCH PLAN

From Discovery to Sales Acceleration

Timing is indicative and will be mapped to the construction and inventory-release schedule [developer to provide]. Each phase has a gate: we proceed when its milestones are met.

PHASE	DELIVERABLES	DEPENDENCIES	DEVELOPER DECISIONS	MILESTONES
1 · Discovery Weeks 1–4	Workshops; buyer and competitor review; existing-lead audit; claims library; compliance review list; measurement plan	Access to project facts, past inquiries, current vendors	Approved positioning direction; budget range; broker of record	Signed-off brief; KPI definitions; legal review scheduled
2 · Foundation & pre-launch Months 2–3	Brand system; website and gated floor plans; CRM, routing, call tracking; nurture sequences; broker portal; first content and video	Renderings, plans, pricing approach, disclosures	Final messaging; price presentation; reservation terms	Website and CRM live; consent flows tested; response standard in place
3 · Launch Months 3–5	Paid search and social; predictive audiences; private VIP and broker previews; first Discovery visits; PR outreach	Approved ad budget; event dates; sales staffing	Event calendar; visit incentives (counsel-reviewed)	First qualified-buyer cohort; first previews held; baseline conversion data
4 · Sales acceleration Months 6–9	Scale proven channels; monthly hosted visits; virtual presentations; referral program; construction-progress content	Inventory availability; construction milestones	Phase 1 release cadence; pricing adjustments	Reservations and contracts tracked by source; cost per contract known
5 · Optimization Months 10–12	Budget reallocation; pricing and product feedback report; Phase 2 pre-launch list and story	Phase 2 plans and timing	Phase 2 positioning and release date	Year-one review; Phase 2 waitlist; targets proposed from real data

IF CONSTRUCTION SLIPS

Shift budget from acquisition to nurture and owner communications; keep reservation holders informed; protect trust.

IF DEMAND OUTPACES INVENTORY

Build a priority waitlist for later phases; use demand data to inform release timing and pricing.

IF A CHANNEL UNDERPERFORMS

Reallocate monthly using qualified-buyer and visit data, not just clicks or lead counts.



09 · TEAM & OPERATING MODEL

Clear Roles, Clear Boundaries

ROLE	RESPONSIBILITY
Executive Director & engagement lead (Krystalore Crews)	Single point of accountability: investor relations, sales strategy, on-site operations, project management, stakeholder and press communications; leads VIP previews and Discovery visits
Growth & technology architect (Jeff Cline)	Business development and partnerships; CRM, routing, call tracking, automation, predictive layer, data governance, dashboard
Strategist & project manager	Positioning, plan, budget recommendations, milestone tracking, monthly reporting
Creative lead	Brand system, website, collateral; direction of renderings, video and photography vendors
Paid media & growth manager	Search, social, retargeting, audiences, testing, budget pacing
Buyer concierge / qualification	Fast first response, qualification, scheduling, nurture; bilingual coverage [hours to confirm]
Broker relations manager	Broker program, portal, previews, registrations, broker communications
Analyst	Attribution, dashboards, buyer-feedback and market-intelligence reports

WHO OWNS WHAT

PARTY	OWNS
Island Developer Partnership	Strategy, creative, media, technology, lead response and qualification, scheduling, events, pipeline operations, reporting
Developer	Pricing, inventory and release decisions, contracts, deposits and escrow, final approval of all claims and materials, ownership of all data and accounts
Licensed brokers	Regulated brokerage activities: representing parties, negotiating terms, presenting offers; broker compensation
Legal counsel	Contracts, disclosures, licensing, DACO and ILSA review, securities and advertising review, tax-related statements
Architects & construction	Design, specifications, schedule and progress information used in buyer communications

LICENSING BOUNDARY

Puerto Rico regulates real estate brokerage under Law 10 of 1994, which defines brokerage activity to include promoting or negotiating sales in exchange for compensation^[22]. We do not perform regulated brokerage unless properly licensed. Where an activity could be brokerage, it is handled by, or under the supervision of, the developer's licensed broker. Counsel should confirm the boundaries for this engagement.

10 · COMMERCIAL MODEL

One Success Package, Aligned Incentives

One package — the complete in-house marketing, sales-operations and technology team — with fees that step down as sales come in.

SUCCESS PACKAGE · FULL-SERVICE

TERMS

Includes	All eight functions; monthly hosted visits; dedicated concierge; third-party agents and brokers as needed, all within one management system
Launch & setup	\$7,500 one-time — discovery, brand system, website, CRM and technology build
Monthly retainer	\$32,500 per month — strategy, marketing, sales operations, technology and reporting
Media & events	\$7,500 per month at the first tier; \$15,000 per month at the second — as needed and pre-approved. Additional spend goes toward activation dollars (events, previews and discovery tours).
Success fee	10% of total sales , paid quarterly, less the monthly retainers paid
Third-party agents & brokers	If third-party real estate agents or brokers must be paid, their fees come out of the 10% success fee as well

HOW THE SUCCESS FEE WORKS · HYPOTHETICAL EXAMPLE

A quarter with **\$3,000,000** in closed sales: 10% = **\$300,000**, less the quarter's three monthly retainers ($3 \times \$32,500 = \$97,500$) = **\$202,500**, less any third-party agent or broker fees required on those sales. Figures are illustrative, not a forecast.

REQUIRED REVIEW

Because compensation tied to sales can raise brokerage-licensing questions in Puerto Rico^[22], the success fee is structured with Puerto Rico counsel to comply with licensing and real estate compensation rules. Paying it through, or alongside, the licensed broker of record is one option counsel may consider.

CONTRACT ITEMS TO AGREE

Attribution window & source rules

Existing leads & house list

Payment trigger (e.g., funded closing)

Cancellations & refunds

Term & renewal

Termination & transition

Data access: developer owns all data and accounts; full handover on exit

11 · DEVELOPER VALUE CASE

Why an Integrated Team Can Change the Economics

LESS FRAGMENTATION

One plan, one budget view and one point of accountability replace multiple vendors and hand-offs.

BETTER FOLLOW-UP

Response standards, routing and nurture sequences reduce the number of buyers lost between inquiry and meeting.

BETTER VISIBILITY

A live funnel shows the developer where buyers are, what they object to and which phases to release next.

SPEND TIED TO SALES

Attribution connects each marketing dollar to reservations and closings, so budget moves to what works.

How to evaluate the value: a formula, not a forecast

Marketing cost per closing = (setup fee amortized + monthly retainer × months + media and events + success fees) ÷ attributable closings

Pipeline value created = qualified buyers × visit rate × reservation rate × contract-to-close rate × average price

Value of better follow-up = additional closings from improved stage conversion × average price, minus the incremental cost of the program

ILLUSTRATIVE EXAMPLE · ALL INPUTS HYPOTHETICAL

HYPOTHETICAL INPUT	VALUE	HYPOTHETICAL INPUT	VALUE
Qualified buyers in a period	A = [e.g., 200]	Visit rate	B = [e.g., 20%]
Reservation rate from visits	C = [e.g., 25%]	Contract-to-close rate	D = [e.g., 90%]

Closings = A × B × C × D. With the bracketed example inputs: 200 × 0.20 × 0.25 × 0.90 = **9 closings**. If better follow-up raised the visit rate from 20% to 25%, the same formula gives about 11. These numbers only show how the levers interact.

They are not forecasts: real inputs come from the developer's data and our first 90 days of results.



12 · RISKS, ASSUMPTIONS & INFORMATION NEEDED

What We Need to Confirm Before Final Pricing and Targets

INFORMATION THE DEVELOPER SHOULD SUPPLY

Exact location, site plan, beach access	[confirm]
Unit mix, sizes, options by phase	[confirm]
Pricing, price-increase policy	[confirm]
Amenities and delivery timing	[confirm]
Ownership, HOA and rental policy	[confirm]
Construction schedule and permits	[confirm]
Sales team and broker of record	[confirm]
Buyer financing assumptions, lender partners	[confirm]
Advertising and events budget	[confirm]
Target opening and release dates	[confirm]
Legal constraints, approvals, disclosures	[confirm]
Available creative assets and rights	[confirm]

REVIEW NEEDS FOR COUNSEL (NOT LEGAL CONCLUSIONS)

- ♦ **Licensing:** who may promote or negotiate sales and receive contingent compensation under Law 10 of 1994^[22].
- ♦ **DACO:** developer licensing, escrow of deposits and advertising content rules under the private-housing construction regulation^[23].
- ♦ **ILSA:** registration exemptions for a 100-residence, multi-phase community^[24].
- ♦ **Securities:** marketing rental income, rental programs or "investment" returns can raise investment-contract questions^[25].
- ♦ **Fair housing:** ad content and audience selection^[20].
- ♦ **Advertising:** truthful, substantiated claims^[26].
- ♦ **Privacy & consent:** TCPA, CAN-SPAM and Puerto Rico breach law^{[17][18][19]}.
- ♦ **Tax statements:** Act 60 claims reviewed by tax counsel^[13].

CLAIMS IN THE CURRENT PRESALE DECK TO RE-VERIFY BEFORE REUSE

- ♦ **Act 60:** the 0% resident-investor rate requires decree applications filed by Dec. 31, 2026; applications from 2027 receive a 4% rate (Act 38-2026)^[13]. Most Oceano Breeze deliveries fall in 2027–2029, so timing claims should be precise and approved by tax counsel.
- ♦ **Market statistics:** the "6–14%", "\$820/sq ft", "~1,100 units" and "~420 units" figures trace to a single brokerage blog; "1,100" describes total Dorado Beach residences and "420" describes all new construction island-wide, not luxury inventory^[4].
- ♦ **Rental income:** short-term-rental figures and "investor" framing should be reviewed for securities and advertising risk before further use^[25].
- ♦ **Location:** landmark and distance claims (e.g., natural pools) should say "nearby" where they are outside Vega Baja^[10].

13 · CLOSING & NEXT STEPS

Let's Build the Pipeline Before the First Release

Oceano Breeze has the ingredients buyers look for: a gated community, contemporary homes, resort-style amenities and a north-coast address close to Dorado and San Juan. What it needs now is a single team that turns those ingredients into a trusted brand, a steady flow of qualified buyers and a pipeline the developer can see and steer. We would welcome a discovery meeting to scope the engagement.

PROPOSED NEXT STEPS

1. **Discovery meeting** (90 minutes): goals, timeline, current team and vendors
2. **Information request:** the items on the previous page
3. **Site visit** hosted by our team
4. **Scoped proposal** with package, pricing and success-fee structure, after counsel review
5. **Discovery sprint kickoff** (Weeks 1-4)

DECISIONS NEEDED TO SCOPE THE ENGAGEMENT

- ♦ Success Package start date and media & events tier
- ♦ Broker of record and broker-program approach
- ♦ Year-one media and events budget range
- ♦ Success-fee basis and attribution rules (with counsel)
- ♦ Phase 1 release timing and pricing presentation
- ♦ Existing systems, accounts and data to migrate

1

ACCOUNTABLE PARTNER

8

INTEGRATED FUNCTIONS

100%

DEVELOPER-OWNED DATA

12

MONTH LAUNCH ROADMAP

Krystalore Crews, MBA · Executive Director

Caribbean Luxury Real Estate Development & Strategic Partnerships

krystalore@thecrewscoach.com · WhatsApp +1 716-390-6727

Jeff Cline · Growth & Technology · R0cketShip & Predictive Data · 972-800-6670



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Accessed October 2026. Project facts are from the developer's Oceano Breeze presale deck (Aug 2026) and are not independently verified. Nothing in this proposal is legal, tax or investment advice, a representation about the project, or a guarantee of sales, appreciation, returns, occupancy or tax treatment.