

## **Cal NARPM 2017 Tax Returns – Password/Pin#**

The Password to get access to the tax returns is: **2735**

# CALNARPM

## BALANCE SHEET

As of December 31, 2018

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
PayPal	-5,358.97
Union Bank	90,443.60
Wells Fargo Checking Account	0.00
<b>Total Bank Accounts</b>	<b>\$85,084.63</b>
Other Current Assets	
Prepaid Conference Expenses	5,000.00
Returned Items Clearing	0.00
Undeposited Funds	0.00
<b>Total Other Current Assets</b>	<b>\$5,000.00</b>
<b>Total Current Assets</b>	<b>\$90,084.63</b>
<b>TOTAL ASSETS</b>	<b>\$90,084.63</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
<b>Total Liabilities</b>	
Equity	
Opening Bal Equity	5,597.47
Retained Earnings	37,146.15
Net Income	47,341.01
<b>Total Equity</b>	<b>\$90,084.63</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$90,084.63</b>

# CALNARPM

## PROFIT AND LOSS

January - December 2018

	TOTAL
Income	
CALNARPM Conference Income	0.00
Attendee Registration	43,990.00
Exhibitor Registration	70,050.00
<b>Total CALNARPM Conference Income</b>	<b>114,040.00</b>
NARPM Income	
NARPM Education	568.20
<b>Total NARPM Income</b>	<b>568.20</b>
<b>Total Income</b>	<b>\$114,608.20</b>
GROSS PROFIT	<b>\$114,608.20</b>
Expenses	
Accounting Fees	1,450.00
CALNARPM Conference Expense	
Audio/Visual Expenses	15,358.64
Hotel/Facilities	29,119.61
Instructor & Speaker Expense	5,250.00
Marketing	
Postage/Printing	2,810.56
Social Media Management and Email Campaigns	1,125.00
Website Services	3,184.40
<b>Total Marketing</b>	<b>7,119.96</b>
Meals & Entertainment	188.58
Supplies, Gifts, Raffle Items	4,541.11
<b>Total CALNARPM Conference Expense</b>	<b>61,577.90</b>
Charitable Contributions	1,632.00
Constant Contact Annual Fee	459.00
Mail Chimp	510.00
Merchant Account Fees	
Chargeback Fees	1,161.35
Standard Fees	-124.06
<b>Total Merchant Account Fees</b>	<b>1,037.29</b>
P.O. Box Fees	96.00
Registration/Licenses/Permits	495.00
Unapplied Cash Bill Payment Expense	10.00
<b>Total Expenses</b>	<b>\$67,267.19</b>
NET OPERATING INCOME	<b>\$47,341.01</b>
NET INCOME	<b>\$47,341.01</b>

**CALNARPM**  
**PROFIT AND LOSS - BUDGET**  
**January - December 2019**

**Income**

CALNARPM Conference Income		
Attendee Registration	\$	44,000.00
Exhibitor Registration	\$	70,000.00
Total CALNARPM Conference Income	\$	114,000.00

NARPM Income		
NARPM Education	\$	600.00
Total NARPM Income		
<b>Total Income</b>	\$	114,600.00

**GROSS PROFIT** **\$ 114,600.00**

**Expenses**

Accounting Fees **\$ 1,450.00**

CALNARPM Conference Expense		
Audio/Visual Expenses	\$	15,000.00
Hotel/Facilities	\$	35,000.00
Instructor & Speaker Expense	\$	12,000.00
Marketing		
Postage/Printing	\$	3,000.00
Social Media Management and Email Campaigns	\$	1,200.00
Website Services	\$	3,200.00
Meals & Entertainment	\$	200.00
Supplies, Gifts, Raffle Items	\$	5,000.00
<b>Total CALNARPM Conference Expense</b>	<b>\$</b>	<b>74,600.00</b>

Charitable Contributions	\$	2,000.00
Constant Contact Annual Fee	\$	500.00
Mail Chimp	\$	500.00
Merchant Account Fees		
Chargeback Fees	\$	1,200.00
Standard Fees	\$	-
P.O. Box Fees	\$	100.00
Registration/Licenses/Permits	\$	500.00
<b>Other Expenses</b>	<b>\$</b>	<b>4,800.00</b>

**Total Expenses** **\$ 80,850.00**

**NET OPERATING INCOME** **\$ 33,750.00**

# Save The Date! CALNARPM Conference & Trade Show (Copy 01)

[Campaign Preview](#)[HTML Source](#)[Plain-Text Email](#)[Details](#)

SAVE THE DATE FOR THE EVENT OF THE YEAR!

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CONFERENCE AND TRADE SHOW 2018

 **SAVE THE DATE**  
**MAY 23 - 25, 2018**



Look for this postcard in your mailbox

**Glam it up at CALNARPM's Tradeshow & Conference. The stars will shine with valuable information and an event to remember.**

1. Grow your business by learning from the top minds in the industry.
2. Network with your peers!!!
3. Get the 'insider info' on the best vendors.
4. Learn how local and national laws will affect your business.
5. Find mentors and build deep friendships.



**BOOK YOUR HOTEL ROOM!**



**Riviera Hotel**

1600 N. Indian Canyon Dr.  
Palm Springs, CA 92260

**GET THE DEAL!**

Deadline: April 23, 2018

Book early to stay for the Holiday weekend!

**CALL FOR PRESENTERS**





Do you have a special presentation that would benefit Property Managers? Be one of our many stars and share your valuable information with us. Interested? Contact Matt Borries - [matt@prandiprop.com](mailto:matt@prandiprop.com)



## AIRPORT INFORMATION



The hotel recommends Ontario International Airport (KONT), it's closer and less expensive than flying into Palm Springs.

[Ontario International Airport](#)

Look for more detailed information coming soon on our website.  
<http://narpmcalifornia.org/conference>

### JOIN NARPM

It's Easy!



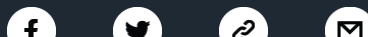
### BLOG

What's New



### VISIT WEBSITE

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# CALNARPM Conference & Trade Show Call For Presenters (Copy 01)

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Workshops and panel presentations are being invited for the CALNARPM 2018 California Conference.

[View this email in your browser](#)



CONFERENCE AND TRADE SHOW 2018  
CALL FOR PRESENTATIONS

 **SAVE THE DATE**  
MAY 22 - 25 2018



## CALL FOR PRESENTATIONS

**Workshops and panel presentations** are being invited for the CALNARPM 2018 California Conference. The CALNARPM Conference boasts attendance of approximately 200 attendees of the professions most influential and qualified residential property managers throughout the State of California. The attendees include company owners, property managers, executive officers, support staff, and suppliers - including those working with technology, website, personal assistance, and others. CALNARPM attendees want **practical knowledge**. Theory is useful only when session participants are shown how to use it. Learning is not a passive activity. Give yourself a break - let others help do the talking. Attendees usually learn best when they are doing, not only when they are listening. Involve participants by using questions, exercises, and other activities.

## WHO CAN SUBMIT A PROPOSAL

**Members and Non-members of NARPM® and CALNARPM** are invited to submit proposals for Conference Presentations [using this form](#). The professional submitting this proposal for the program is responsible for all details including proposal

submission, communication with co-presenters, presentation format, audio-visual requests, and payment of fees.

## WHAT'S INCLUDED

**CALNARPM** will provide audio-visual equipment at no cost if requested by the deadline on the Speaker Guidelines sent later. Audio-visual equipment includes: projector, screen, microphone (if needed), and extension cord. Presenters will be responsible for providing their own laptops and laptop cables.

## DEADLINE

Proposals must be received by CALNARPM no later than **January 31, 2018**

## THE THEME

When submitting the proposal, keep the 2018 Conference theme in mind:

**“The Stars of Property Management”**



Glitz and Glam and Old Hollywood style.

**GET THE PRESENTER FORM**

**VISIT THE WEBSITE**

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# CALNARPM Conference & Trade Show Exhibitor Information

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Register to be an Exhibitor for the CALNARPM 2018 Conference.

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CONFERENCE AND TRADE SHOW 2018  
EXHIBITOR TRADESHOW INFORMATION and  
REGISTRATION

 **SAVE THE DATE**  
**MAY 23 - 25 2018**



ONLINE EXHIBITOR REGISTRATION

## SPONSORSHIP LEVELS

### CONFERENCE PARTNER

Two (2) Available



### GOLD

Ten (10) Available



**FOUR MINUTES TO PITCH YOUR COMPANY TO  
A ROOM OF EXCLUSIVELY BROKER-OWNERS!**

**Followed by a private happy hour**  
Open to Conference Partners  
and Gold Sponsors only

**SILVER**

Fourteen (14) Available

**BRONZE**

Ten (10) Available

**VISIT THE WEBSITE and REGISTER ONLINE****THE THEME****“The Stars of Property Management”**

Glitz and Glam and Old Hollywood style.

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**BLOG**

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# CALNARPM February 2018 Events

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Don't Miss the CALNARPM February 2018  
Upcoming Local Chapter Events!

[View this email in your browser](#)



## CALNARPM e-NEWSLETTER

### LOCAL CHAPTER EVENTS

### EVENT CALENDAR!

CALNARPM Now has a collection of your local chapter events in one calendar area on our website. Don't forget to submit your event to Bonnye or Dimitri to be included!

## Event Calendar

## FEBRUARY 2018 LOCAL CHAPTER EVENTS



## SANTA CLARA

## Guest Speaker

Alex Osenenko

Thursday, February 15, 2018

8:30am - 10:00am

Three Flames Restaurant San Jose

[GET MORE INFO](#)[WEBSITE](#)

## LONG BEACH / ORANGE COUNTY

WHAT WOULD YOU "LOVE" TO DO IN  
YOUR BUSINESS THIS YEAR?

Featuring Jason Hull of Door Grow

Thursday, February 15, 2018

11:30am - 1:00pm

Come early for networking!

The Crab Pot

[GET MORE INFO](#)[WEBSITE](#)

## MARIN / SONOMA

## LEGISLATIVE UPDATE

Presented by Linda A. Ryan

Thursday, February 15, 2018

12pm - 1:30pm



McNear's Saloon & Dining House

[GET MORE INFO](#)

[WEBSITE](#)



## LOS ANGELES

### Best Practices for Property Managers and their Clients

*Guest Speaker Laura Logan*

Wednesday, February 21, 2018

Oakmont Country Club

8:30am - 10:00am

[GET MORE INFO](#)

[WEBSITE](#)

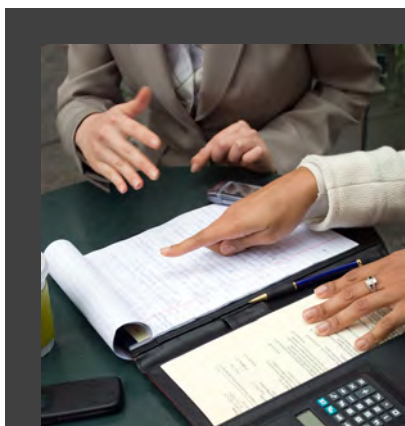


## SAN DIEGO

Meetings are on the third Wednesday of every month from 11:30am - 1:30pm

San Diego Association of Realtors  
Office

[WEBSITE](#)



## SACRAMENTO

### Code Enforcement Class

Thursday, February 22, 2018

Scaramento Association of Realtors

9:00am - 11:30am

[GET MORE INFO](#)

[WEBSITE](#)





## ALAMEDA/CONTRA COSTA COUNTIES

### MONTHLY MEETINGS

Third Thursday of each month

11:30am - 1:00pm

[WEBSITE](#)



## NARPM CHAPTER LEADERS

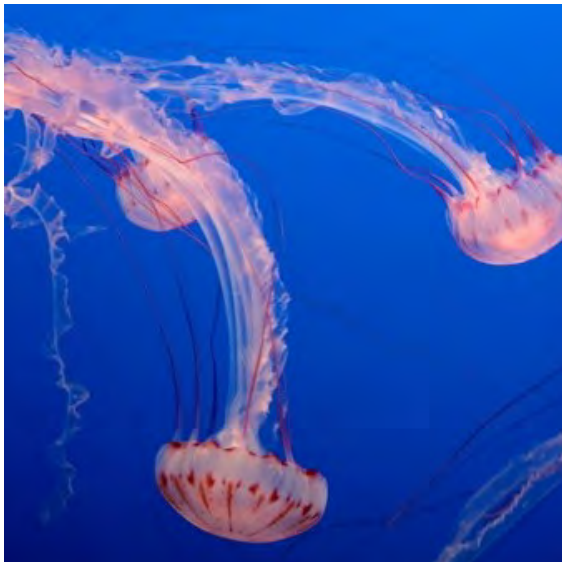
Do you have an event you would like included in our E-Newsletter?

### Contact:

Bonnye Sirk - [bonnye@rossmoyne.com](mailto:bonnye@rossmoyne.com)

or

Dimitri Amor - [damor@jdproperty.com](mailto:damor@jdproperty.com)



## MONTEREY BAY

[WEBSITE](#)

More info coming later

## NORTHERN CALIFORNIA





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**BLOG**

What's New



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# CALNARPM March 2018 Events

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Don't Miss the CALNARPM March 2018 Upcoming Local Chapter Events!

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## CALNARPM e-NEWSLETTER

### LOCAL CHAPTER EVENTS

#### EVENT CALENDAR!

CALNARPM Now has a collection of your local chapter events in one calendar area on our website. Don't forget to submit your event to Bonnye or Dimitri to be included!

## Event Calendar

## MARCH 2018 LOCAL CHAPTER EVENTS



## MARIN / SONOMA

## BROKER OWNER PANEL

Thursday, March 15, 2018

12pm - 1:30pm

McNear's Saloon &amp; Dining House

[GET MORE INFO](#)[WEBSITE](#)

## SACRAMENTO

## HOW TO BE DISASTER READY

Presented by Keith Becker MPM® RMP®

Tuesday, March 20, 2018

Sacramento Association of Realtors

11:00am - 1:00pm

[GET MORE INFO](#)[WEBSITE](#)

## SACRAMENTO

## MARCH MIXER

Thursday March 22, 2018

[Blue Cue](#)

5:00pm - 7:00pm

[GET MORE INFO](#)[WEBSITE](#)



## SAN DIEGO

Meetings are on the third Wednesday  
of every month from 11:30am - 1:30pm

San Diego Association of Realtors  
Office

[WEBSITE](#)



## ALAMEDA/CONTRA COSTA COUNTIES

### MONTHLY MEETINGS

Third Thursday of each month

11:30am - 1:00pm

[WEBSITE](#)



## NARPM CHAPTER LEADERS

Do you have an event you would like included in  
our E-Newsletter?

### Contact:

Bonnye Sirk - [bonnye@rossmoyne.com](mailto:bonnye@rossmoyne.com)

or

Dimitri Amor - [damor@jdproperty.com](mailto:damor@jdproperty.com)



## SANTA CLARA

[WEBSITE](#)





## LONG BEACH / ORANGE COUNTY

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[WEBSITE](#)



## LOS ANGELES

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[WEBSITE](#)



## MONTEREY BAY

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[WEBSITE](#)

More info coming later



## NORTHERN CALIFORNIA CENTRAL VALLEY

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[WEBSITE](#)

More info coming later





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# Registration Open! CALNARPM Conference & Trade Show

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REGISTER FOR THE EVENT OF THE YEAR!

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CONFERENCE AND TRADE SHOW 2018

**CONFERENCE & TRADESHOW  
MAY 23 - 25, 2018**



### EARLY BIRD MEMBERS

*(NARPM & CALNARPM Members Only)*

Deadline March 15, 2018

**\$215**

After March 15th

**\$245**

### EARLY BIRD GENERAL ADMISSION

*(Non-Members Only)*

Deadline March 15, 2018

**\$255**

After March 15th

**\$285**

**GET MY TICKET**

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1. Grow your business by learning from the top minds in the industry.
2. Network with your peers!!!
3. Get the 'insider info' on the best vendors.



4. Learn how local and national laws will affect your business.
5. Find mentors and build deep friendships.

## KEYNOTE SPEAKERS



### TIM HOYLE

Tim Hoyle is the leader in Bay Area Human Performance Metrics. Tim is a certified Behaviors Analyst and award winning presenter. In his company's 20 years, Tim has conducted hundreds of team sessions and assessed over 3,000 employees.



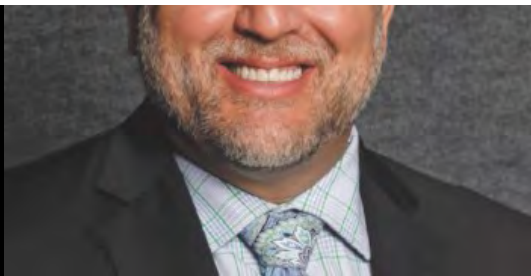
### MARC CUNNINGHAM

Marc grew up in the family property management company his father founded in 1978, Grace Property Management. Growing up, Marc did everything from pulling weeds to accounting. He joined the firm permanently in 1997 and is currently the President. Grace Management is located in Denver and manages over 600 residential and commercial doors and has 18 team members.



### BRIAN BIRDY

NARPM President Brian Birdy, MPM® RMP®, served for 15 years in the United States Air Force before starting in property management. In 2000, he earned his



Texas Real Estate License and went to work in the family business at Birdy Properties, CRMC®. In 2004, he received his Texas Real Estate Broker License and bought the company from his father. PMI Birdy Properties has specialized in property management for over 39 years. Brian has taken the company from a one-man office with 75 properties to a business of over 20 employees that manages over 1600 properties.



## BOOK YOUR HOTEL ROOM!



### Riviera Hotel

1600 N. Indian Canyon Dr.  
Palm Springs, CA 92260

**GET THE DEAL!**

Deadline: April 23, 2018

Book early to stay for the Holiday weekend!



## AIRPORT INFORMATION



Ontario International Airport

Look for more detailed information coming soon on our website.

<http://narpmcalifornia.org/conference>

### JOIN NARPM

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### BLOG

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# CALNARPM Conference Featured Speakers 1

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CONFERENCE AND TRADE SHOW 2018

CONFERENCE & TRADESHOW  
MAY 23 - 25, 2018







## This Week's Featured Speakers



### **A – Burning Issues Surrounding Tobacco and Marijuana Smoking in Rental Property.**

*Jessica Wiesman*

Smoking continues to be a burning topic in the rental housing industry. Landlords often have to make difficult decisions in this area, such as determining whether or not they will (or have to) restrict smoking at their property, creating and enforcing rules concerning smoking, and appropriately responding to complaints of smoking.



### **B – Everything You Need to Know About Virtual Staffing.**

*Anne Lackey*

From the tasks they can do, to how to pay them, the technology to communicate with them, it can be overwhelming. In this is an in-depth workshop, we will focus on what you need to know to be successful in deploying virtual staff in your property management business.



### **C – The One Year Property Management Growth Plan.**

**Alex Osenenko**

Alex Osenenko will be presenting a detailed blueprint on how to add \$1,000,000 in lifetime customer value (LTV) to a property management business over a 12 month period.

**D – Top 5 Acquisition Deal Killers and How to Leverage Technology to Avoid Them.****James Wagley**

Come gain valuable insight from Propertyware SVP James Wagley on the top five acquisition deal killers and how to leverage technology to avoid them.

[\*\*SEE THE CALNARPM WORKSHOP SCHEDULE\*\*](#)**EARLY BIRD MEMBERS**

*(NARPM & CALNARPM Members*

*Only)*

Deadline April 15, 2018

**\$215**

After April 15th

**\$245**

**EARLY BIRD GENERAL  
ADMISSION**

*(Non-Members Only)*

Deadline April 15, 2018

**\$255**

After April 15th

**\$285**

[\*\*GET MY TICKET\*\*](#)**BOOK YOUR HOTEL ROOM!****Riviera Hotel**

1600 N. Indian Canyon Dr.  
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## KEYNOTE SPEAKERS



### TIM HOYLE

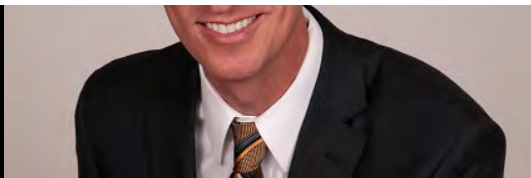
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CONFERENCE AND TRADE SHOW 2018

CONFERENCE & TRADESHOW  
MAY 23 - 25, 2018





## This Week's Featured Speakers



### **E – User's Guide to the Human Being.**

*Tim Hoyle*

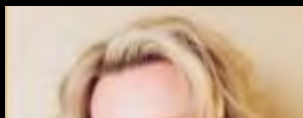
This highly interactive program teaches participants how to create their own User's Manual to help maximize the strength of their personality and limit repeat mistakes.



### **F – Contracts for Property Managers.**

*Tom Sedlack*

This workshop will discuss the essential elements of a world class Management Agreement, and Lease agreement. The goal is to raise the awareness of the use of good contracts, and the linkage between the Management Agreement and the Lease giving the Property Manager more control, flexibility and reduced risk.



### **G – Effectively Screening Prospective Tenants.**

*Kimberly Niemiste & James Karjian*

This course addresses the topic of obtaining the "big





This course addresses the topic of obtaining the "big picture," from interview to decision on prospective residents. Areas of instruction include the application process and the screening reports while maintaining compliance with Fair Housing, Fair Credit Reporting Act (FCRA) and the Fair and Accurate Credit Transaction ACT (FACTA).



#### **H – Property Manager's Guide to Social Media.**

*Sarah Pallatoni*

Sarah will lay out an easy-to-follow 5-step social media strategy that any property manager can use and implement in their business.

**SEE THE CALNARPM WORKSHOP SCHEDULE**

**MEMBERS  
ADMISSION**

**\$245**

**GENERAL  
ADMISSION**

**\$285**

**GET MY TICKET**



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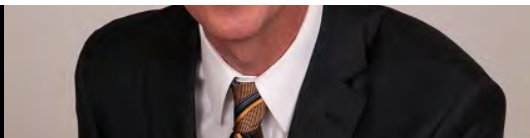
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Look for more detailed information coming soon on our website.  
<http://narpmmcalifornia.org/conference>

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CONFERENCE AND TRADE SHOW 2018

**CONFERENCE & TRADESHOW  
MAY 23 - 25, 2018**







## This Week's Featured Speakers



### **I – Communicating With Owners, Selling Yourself and Your Company.**

*Brian Birdy*

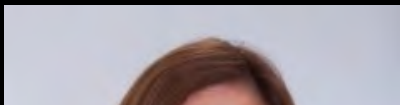
In this session we will discuss the importance of the initial conversation with a prospective Owner.



### **J – How to Prepare for the Incoming California Renter's State.**

*Scott Brady*

Fundamental and potentially irreversible changes are occurring in California. California could be the first state where renter's constitute the majority of households and will continue imposing their political will on cities and counties. Learn what you can do to prepare for a renter state.



### **K – To Change or Not to Change, That is the Question.**



*Melissa Prandi*

This workshop will look at the things that have changed and some great things that still work today. Check off lists, systems and things that work or STILL work without using a computer or software.

**L – Crisis Management: Are You Legally Prepared.***Jessica Weisman*

Rental property owners and managers can be held liable if they fail to take reasonable care in preventing, minimizing, and responding to a crisis on their property.

[SEE THE CALNARPM WORKSHOP SCHEDULE](#)**MEMBERS  
ADMISSION****\$245****GENERAL  
ADMISSION****\$285**[GET MY TICKET](#)

**At the State Conference**  
**NARPM CALIFORNIA EDUCATION EVENTS**  
**May 23, 2018**

**Marketing for  
Residential**

**Intro to  
Maintenance:**

## Property Management

**Instructor:** Melissa Prandi, MPM® RMP®

In this course you will develop a mission statement (or refine yours if you have one) and decide upon a related marketing goal to help guide your business. You will examine branding and the importance of knowing how your clients and customers think, feel, and behave.

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## Covering the Basics of Standards, Codes & Safety

**Instructor:** Brian Birdy, MPM® RMP®

This course touches on aspects of the Uniform Housing Code, habitability standards & local codes, policies of insurance companies and NARPM®'s Standards of Professionalism.

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### BOOK YOUR HOTEL ROOM!



#### Riviera Hotel

1600 N. Indian Canyon Dr.  
Palm Springs, CA 92260

[GET THE DEAL!](#)

Deadline: April 23, 2018

Book early to stay for the Holiday weekend!

**Glam it up at CALNARPM's Tradeshow & Conference. The stars will shine with valuable information and an event to remember.**

1. Grow your business by learning from the top minds in the industry.
2. Network with your peers!!!
3. Get the 'insider info' on the best vendors.
4. Learn how local and national laws will affect your business.
5. Find mentors and build deep friendships.

## KEYNOTE SPEAKERS



### TIM HOYLE

Tim Hoyle is the leader in Bay Area Human Performance Metrics. Tim is a certified Behaviors Analyst and award winning presenter. In his company's 20 years, Tim has conducted hundreds of team sessions and assessed over 3,000 employees.



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**May 23, 2018**

Don't miss the opportunity to sign up for these valuable education courses offered at the State Conference.

Courses are being taught by the experts!  
Melissa Prandi and Brian Birdy

**Deadline is Friday, April 27, 2018**

## Marketing for Residential Property Management

**Instructor:** Melissa Prandi, MPM® RMP®

In this course you will develop a mission statement (or refine yours if you have one) and decide upon a related marketing goal to help guide your business. You will examine branding and the importance of knowing how your clients and customers think, feel, and behave.

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CONFERENCE AND TRADE SHOW 2018

**CALNARPM SOCIAL**  
*Glam it Up*  
Set the mood. Turn some heads. Dress to Dazzle.



Join us for a spectacular party with the stars. Come dressed to relax and be cool and enjoy the warm evening.

**Thursday, May 24, 2018**

**8:45pm**

**Cafe Palmetto Patio**

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**MEMBERS  
ADMISSION**

**\$245**

**GENERAL  
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SOLD OUT!**

There are rooms still available but at  
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Book your rooms through Hotels.com,  
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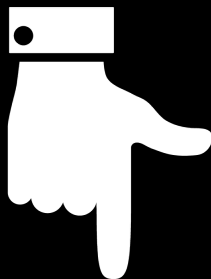
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*Thank you!!!*

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You still have time to register to attend! Just hit the button and join us for our annual conference.



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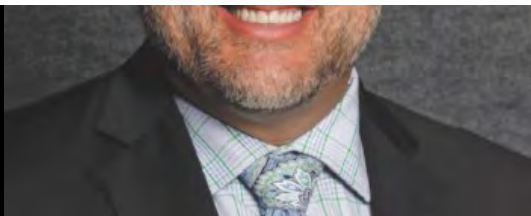
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**2015-2016 CALNARPM Board of Directors**

*Lisa Fore, President*

*Cheryl Chase-Berkson, President Elect & Legislative Director*

*Jennifer Newton, 2014-2015 President*

*Bob Thomas, 2013-2014 President*

*Stephanie Gordon, Treasurer*

*Barbara Barrows, Secretary*

*Ellen Purdy, Education Director*

*Alex Osenenko, Affiliate Director*

*Mike Catalano, Communications/Membership Co-Director*

*Ryan Miller, Communications/Membership Co-Director*

**Minutes  
CALNARPM Annual Meeting**

Napa Valley Marriott

Thursday, April 13, 2017

12:45 p.m.

- I. **Call to Order/Introductions** – *Cheryl Chase Berkson 12:45 PM*
- II. **Secretary's Report** – *Cheryl Chase-Berkson*
  - a. ***Voting Action Required*** - approval of the Minutes from the February 11, 2016 state chapter meeting held in San Diego, California **Motion was made by Jennifer to approve the Minutes from February 11, 2016. The motion was seconded by Ellen Purdy. Vote was passed unanimously and the Minutes approved.**
- III. **Treasurer's Report** – *Bob Davie*
  - a. ***Voting Action Required*** – approval of the July 1, 2015 – June 30, 2016 Financials **Motion was made by Keith Becker to approve the 07/01/2015-06/30/2016 Financials. Motion was seconded by Mike Catalano. The vote was passed unanimously and the Financials for 07/01/2015-06/30/2016 approved.**
- IV. **New Business** – *Cheryl Chase-Berkson*
  - a. CALNARPM earned Chapter Excellence in 2016.
  - b. How can you help CALNARPM with the combined Chapter Compliance/Excellence Award for the upcoming year?
    - i. Email us and let CALNARPM know if you are a candidate for any designations
    - ii. Email us and let us know if you have had an article published in *Residential Resource*
    - iii. Sign up for Leadership Classes
    - iv. Send us a copy of the certificate you receive when you complete a NARPM course
- V. **Old Business** – *Cheryl Chase-Berkson*
  - a. Elections for new Board positions will be held next month via email
    - i. Always looking for new and fresh ideas to contribute so please consider volunteering for the next term which begins July 1<sup>st</sup>. Email Sterling or any member of the Executive Committee if you are interested.
- VI. **Adjournment 1:00 PM**



## Minutes

### 2016-2017 Board Meeting

Tuesday, June 27, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

- I. **Call to Order/Introductions** – *Cheryl Chase-Berkson 9:30 a.m.*
  - a. Present: *Cheryl Chase-Berkson, Lisa Fore, Cici Rosas, Bob Davie, Dana Wares, Bonnye Sirk, Dimitri Amor*
  - b. Absent: *Alex Osenenko, Matt Borries, Barbara Barrows*
  - c. Staff: *n/a*
- II. **NARPM® Code of Ethics** – *Cheryl Chase-Berkson Cheryl Chase-Berkson read Article 8 aloud to members on the call, as well as the Standard of Professionalism 6-1.*

- **Article 8: COMMITMENT TO FIRM**
- *The Property Manager shall act in the best interests of his or her property management Firm.*
- **STANDARDS OF PROFESSIONALISM**
- **8-1** The Property Manager shall not have any undisclosed conflict of interest with his or her Firm. If a conflict or potential conflict should arise, the Property Manager shall notify his or her Firm immediately.
- **8-2** The Property Manager shall not receive any form of compensation, rebates, or any other benefits without full disclosure to his or her Firm.
- **8-3** The Property Manager may not take or use any proprietary documentation, including but not limited to Client/Tenant lists, during or after his or her relationship with a Firm without express written consent from the Firm.

- III. **Secretary's Report** – *N/A*
  - a. The minutes for the past meeting were not received by any of the present board members.
  - b. Dimitri Amor volunteered to document the minutes for this meeting.
- IV. **Treasurer's Report** – Bob Davie
  - a. Bob reviewed the profit and loss, balance sheet and the statement of accounts.
  - b. The majority of the expenses were conference related.
  - c. We have not filed the 2016 taxes. Bob filed for an extension. Cost to have an accountant



**2016-2017 CALNARPM Board of Directors**

*Cheryl Chase-Berkson, President*

*Lisa Fore, 2015-2016 President*

*Barbara Barrows, Secretary*

*Bob Davie, Treasurer*

*Alex Osenenko, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

review is \$500.00.

d. Reviewed Paypal transaction charges. Bob provided a report directly from Paypal

e. Bob consolidated the chart of accounts.

f. There are two additional deposits that will be made in July 2017. The first from NARPM national for education in the amount of \$918.98. The second from Ernst and Haas for the conference in the amount of \$1800.00.

g. Taking the two additional deposits into consideration, we should have around \$1000 at the close of the tax year.

h. Board approved Bob's report formally at 10:11 AM.

V. **Communication** – *Bonnye Sirk/Dimitri Amor: Nothing new to report.*

VI. **Legislative** – *Dana Wares: Dana sent a new legal update. Also discussed Dana researching education courses to offer CAL NARPM members. Dana advised that her firm focuses on education when evictions are down.*

VII. **Old Business** – *Cheryl Chase-Berkson: N/A*

VIII. **New Business** – *Cheryl Chase-Berkson*

a. **2017-2018 Membership Dues – when do we start working on this?** Discussion was held on the question of waiving dues for 2017-2018. It was agreed, as Cheryl's final act as president, that a committee be formed to evaluate the pros and cons of membership dues. The members of the committee are as follows: Cici Rosas, Bonnye Sirk, and Bob Davies. The board agreed to withhold the decision until July 27, 2017.

b. **2017-2018 BOD Positions – when do we start working on this?** Lisa Fore received five Self-Nomination forms. Lisa Fore and Cheryl Chase-Berkson agreed to review the forms separately and come to a decision regarding the forms. They plan to arrive at a decision around July 7, 2017. The board approved this decision.

IX. **Future Meeting Date:**

a. **Tuesday, July 25 A.M. 2017 at 9:30 a.m.**

X. **Adjournment 10:26 AM.**



## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

## **Minutes**

### **2017-2018 Board Meeting**

Tuesday, July 25, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

#### **I. Call to Order/Introductions – Cici Rosas 9:33 A.M.**

- a. Present: Cici Rosas, Cheryl Chase-Berkson, Barbara Barrows, Bob Davie, Michael Braddon, Matt Borries, Dana Wares, Lisa Fore
- b. Absent: Dimitri Amor, Bonnye Sirk

#### **II. NARPM® Code of Ethics – Cici Rosas Cici Rosas read Article 1: Responsibility to Protect the Public aloud to the BOD members.**

##### **Article 1: RESPONSIBILITY TO PROTECT THE PUBLIC**

***The Property Manager shall protect the public against fraud, misrepresentation, and unethical practices in property management.***

##### **STANDARDS OF PROFESSIONALISM BOD members read Standards of Professionalism individually.**

- **1-1** The Property Manager shall endeavor to eliminate, through the normal course of business, any practices which could be damaging to the public or bring discredit to the profession.
- **1-2** The Property Manager shall cooperate with the governmental agency charged with regulating the practices of Property Managers.
- **1-3** The Property Manager shall comply with all relevant local and state ordinances regarding real estate law, licensing, insurance, and banking.
- **1-4** The Property Manager shall comply with all federal and state antitrust laws and shall follow the NARPM® Antitrust Policy and any related procedures.
- **1-5** The Property Manager shall not reveal confidential information of Clients, Tenants or others except as required in the course of performing his or her duties or as otherwise required by law. The Property Manager shall take all reasonable precautions to protect confidential information.
- **1-6** The Property Manager shall use reasonable efforts to ensure that information on his or her website, or that of his or her Firm, is current and accurate. If it becomes apparent that information on the website is not current or accurate, then the Property Manager shall promptly take corrective action.
- **1-7** Websites of the Property Manager shall not contain any deceptive metatags or other devices/methods to direct, drive, or divert Internet traffic in a deceptive manner or to otherwise





## **2017-2018 CALNARPM Board of Directors**

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mislead users. The websites shall also not manipulate listing content in any deceptive or misleading way.

- **1-8** The Property Manager shall disclose all details on the availability of rental properties to prospective parties on a regular and timely basis.
- **1-9** The Property Manager shall not exaggerate, misrepresent, misinform, or conceal pertinent facts in the advertising, leasing, and management of property.
- **1-10** The Property Manager shall make reasonable attempts to remove from the Internet listings for rentals that are no longer available.

### **III. Secretary's Report – Barbara Barrows/Michael Braddon**

Vote needed to approve the Minutes of the June 27, 2017 BOD Meeting. **Barbara Barrows made a motion to approve the Minutes of the June 27, 2017 BOD Meeting. The motion was seconded by Cheryl Chase-Berkson. The vote passed unanimously and the Minutes for the June 27, 2017 BOD Meeting were approved.**

### **IV. Treasurer's Report – Bob Davie**

Vote needed to approve the YE Financial Reports: Profit & Loss, Balance Sheet, Bank Statement for June 30, 2017. **Bob Davie reviewed the financial reports with the BOD members. Cici Rosas made a motion to approve the financials for June 30, 2017. The motion was seconded by Cheryl Chase-Berkson. The vote passed unanimously and the June 30, 2017 financial reports were approved.**

### **V. 2017-2018 Board – Cici Rosas**

The Executive Committee members are appointed (President, Immediate Past President, President-Elect, Secretary, Treasurer). What action is needed to finalize Director positions: Affiliate, Education, Legislative, Membership, Communications? **The BOD discussed the appointment of Curt Bulloch to the Affiliate Director position. Cici Rosas agreed to reach out to Curt and confirm his interest. BOD agreed to vote on his appointment at the August 29, 2017 BOD meeting. Cici Rosas also agreed to reach out to Efren Espinoza regarding his Self-Nomination form and find out how he would like to serve this year. Cici will invite both Curt and Efren to attend the August 29, 2017 BOD conference call.**



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*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

## **VI. Membership Dues – Cici Rosas**

The Dues Committee met via conference call on 7/13/17 and made the decision to waive annual membership fees for the 2017-2018 year. The Board needs to vote to adopt or decline this decision. The National offices need to be notified, and we need an updated National membership list in order to send out an e-mail to all California-based NARPM members. **Barbara Barrows reported to the BOD the activities of the Membership Dues committee, as follows:**

- The committee members are Barbara Barrows, Cici Rosas, Bonnye Sirk, Bob Davie
- The committee met via conference call on July 13, 2017
- Bonnye Sirk was not able to be on the call
- The committee members discussed the pros and cons of both keeping annual dues and waiving annual dues (for 2017 only).
- The findings of the committee were that a.) only a small fraction of NARPM members who are operating as Property Managers in California paid dues last year; b.) the amount of funds collected in dues was offset by the cost to pay an Executive Director for billing, collecting, tracking and documenting payments received; c.) the amount of revenue lost by waiving annual dues can be recouped through increased attendance at the annual Conference/Trade Show, and by eliminating the cost of an E.D. to facilitate collection of dues.

The Membership Dues committee's recommendation was that annual dues be waived for 2017, with the agreement that this issue can be revisited in future if necessary. Cici Rosas made a motion to accept the committee's recommendation to waive CALNARPM membership dues for 2017. The motion was seconded by Barbara Barrows. The vote passed unanimously.

## **VII. CALNARPM Website Support – Cici Rosas**

Our website support has been provided by Alex Osenenko. Is he going to be available to do this in the upcoming year? We will need to have our CALNARPM 2018 Conference page created and launched as soon as possible. If Alex will not be doing this in the upcoming year, the Board needs to come up with an alternate plan. **Cici Rosas reported that Alex Osenenko has agreed to submit a proposal to the CALNARPM BOD for website support for 2017.**



## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

### **VIII. CALNARPM 2018 Conference Committee – Cici Rosas**

A committee needs to be formed prior to our next BOD meeting. This committee is tasked with planning the next CALNARPM Conference. Cici Rosas, Barbara Barrows, Cheryl Chase-Berkson, Bob Davie and Matt Borries all agreed to be on the 2018 CALNARPM Conference planning committee. It was further agreed that the first meeting of the committee will be on Tuesday, August 8, 2017 at 9:30 AM. The topics for this first meeting will be date and location. Further it was agreed that the committee shall have a second meeting on August 22, 2017 at 9:30 AM and the topics at that meeting shall be budget and timeline.

### **IX. Elite Venue – Cici Rosas**

The BOD needs to determine if we wish to renew our contract with Elite Venue. Cici Rosas agreed to contact Elite Venue to obtain a proposal to continue the e-mail/newsletter services from 2016-2017, as well as additional proposal for website support. This item will be reviewed at the August 29, 2017 BOD meeting.

### **X. Communication – Bonnye Sirk/Dimitri Amor No report**

### **XI. Legislative – Dana Wares Dana Wares reported that, with the California Legislative session on Summer break, there are no new bills to report. Dana reported that the City of Concord is still meeting to decide on rent control measures and so far have voted to approve a measure requiring landlords to notify their tenants that they have a right to mediation if given a notice of rent increase.**

### **XII. Membership – Bonnye Sirk/Dimitri Amor No report.**



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**XIII. Old Business** – Cici Rosas **None**

**XIV. New Business** – Cici Rosas **Barbara Barrows reported that she will contact Secretary Michael Braddon with information on the tasks that the Secretary position has been responsible for.**

**XV. Future Meeting Dates –**  
**a. Tuesday, August 29, 2017 @ 9:30 a.m.**  
**b. Tuesday, September 26, 2017 @ 9:30 a.m.**  
**c. Tuesday, October 31, 2017 @ 9:30 a.m.**

**XVI. Adjournment** – Cici Rosas **10:40 AM**



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*  
*Cheryl Chase-Berkson, 2016-2017 President*  
*Barbara Barrows, President-Elect*  
*Michael Braddon, Secretary*  
*Bob Davie, Treasurer*  
*, Affiliate Director*  
*Matt Borries, Education Director*  
*Dana Wares, Legislative Director*  
*Bonnye Sirk, Membership/Communications Co-Director*  
*Dimitri Amor, Membership/Communications Co-Director*

**Minutes**  
**2017-2018 Board Meeting**

Tuesday, August 29, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

- I. Call to Order/Introductions – Cici Rosas 9:36 A.M.**
- a. Present: Cici Rosas, Cheryl Chase-Berkson, Barbara Barrows, Bob Davie, Michael Braddon, Matt Borries, Dana Wares, Bonnye Sirk
  - b. Absent: Dimitri Amor, Lisa Fore
- II. NARPM® Code of Ethics – Cici Rosas**  
*Cici Rosas read Article 2: DISCRIMINATION ... aloud to the BOD members.*

**Article 2: DISCRIMINATION**

*The Property Manager shall not discriminate in the rental, lease, or negotiation for real property based on Fair Housing Laws as disseminated by the U.S. Department of Housing and Urban Development and shall comply with all federal, state, and local laws concerning discrimination.*

**STANDARDS OF PROFESSIONALISM**

**BOD members were encouraged to read Standards of Professionalism individually.**

- **2-1 It is the duty of the Property Manager to educate those with whom the Property Manager is affiliated to comply with all fair housing laws and laws regarding discrimination.**
- **2-2 The Property Manager shall not deny service to any person due to race, color, religion, sex, handicap, familial status, national origin, sexual orientation, or gender identity.**

**III. Secretary's Report – Barbara Barrows/Michael Braddon**

Vote needed to approve the Minutes of the July 25, 2017 BOD Meeting. Bob Davie made a motion to approve the Minutes of the July 25, 2017 BOD Meeting. The motion was seconded by Cici Rosas. The vote passed unanimously and the Minutes for the July 25, 2017 BOD Meeting were approved.





## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

### **IV. Treasurer's Report – Bob Davie**

Vote needed to approve the monthly Financial Reports: Profit & Loss, Balance Sheet, Bank Statement for July 31, 2017. Bob Davie reviewed the financial reports with the BOD members. Michael Braddon made a motion to approve the financials for July 31, 2017. The motion was seconded by Cici Rosas. The vote passed unanimously and the July 31, 2017 financial reports were approved.

NOTE: No refunds of member's dues were needed.

### **V. 2017-2018 Board – Cici Rosas**

The BOD discussed the appointment of Curt Bulloch to the Affiliate Director position. Cici Rosas agreed to reach out to Curt and confirm his interest; he hasn't responded.

Cici has recommended Letitia Hanke, ARS Roofing from Santa Rosa, CA. Cici will seek to have her fill out Self-Nomination form and find out how she would like to serve this year.

[http://www.arsroofing.com/about\\_ars\\_roofing\\_santa\\_rosa/meet-the-ceo-letitia-hanke/](http://www.arsroofing.com/about_ars_roofing_santa_rosa/meet-the-ceo-letitia-hanke/)

### **VI. Membership Dues – Cici Rosas**

The Membership Dues committee's recommendation was that annual dues be waived for 2017, with the agreement that this issue can be revisited in future if necessary. Cici Rosas made a motion, AT THE LAST board meeting to accept the committee's recommendation to waive CALNARPM membership dues for 2017. The motion was seconded by Barbara Barrows. The vote passed unanimously.

Cici will work with Bonny Sirk, Membership/Communications Co-Director, to send two emails out to the membership. The first to introduce the new President and second email to announce the other board positions and waiving of membership dues.

NOTE: Barabra stated the MailChimp email list is basically up to date.



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*  
*Cheryl Chase-Berkson, 2016-2017 President*  
*Barbara Barrows, President-Elect*  
*Michael Braddon, Secretary*  
*Bob Davie, Treasurer*  
*, Affiliate Director*  
*Matt Borries, Education Director*  
*Dana Wares, Legislative Director*  
*Bonnye Sirk, Membership/Communications Co-Director*  
*Dimitri Amor, Membership/Communications Co-Director*

**VII. CALNARPM Website Support –**

Cici Rosas

Our website support has been provided by Alex Osenenko. Is he going to be available to do this in the upcoming year? We will need to have our CALNARPM 2018 Conference page created and launched as soon as possible. If Alex will not be doing this in the upcoming year, the Board needs to come up with an alternate plan.

Cici Rosas reported that Alex Osenenko has agreed to submit a proposal to the CALNARPM BOD for website support for 2017-18. Cici and Michael are working with Alex Osenenko to come up to speed on [www.californianarpm.org](http://www.californianarpm.org) web hosting, registration, and payment methods. Alex will continue to host the web site at the current pricing; ~\$285 every quarter.

NOTE: Alex is scheduled to show Michael how to use the web site tools, registration, and payment methods on September 7th, 2017 at 3 PM.

Michael will report back to the board on findings at the next Board Meeting.

**VIII. CALNARPM 2018 Conference Committee – Cici Rosas**

A committee needs to be formed prior to our next BOD meeting. This committee is tasked with planning the next CALNARPM Conference. Cici Rosas, Barbara Barrows, Cheryl Chase-Berkson, Bob Davie, Matt Borries and, now, Michael Braddon all agreed to be on the 2018 CALNARPM Conference planning committee.

At the last meeting on August 23rd, 2017 @ 9:30 AM the committee recommended:

Location – Palm Springs Riviera Hotel in Palm Springs

Date – Feb 14-16<sup>th</sup>, 2018

Suggested Theme: "Stars of Property Management" & Logo (in progress)

The next meeting of the committee will be Tuesday, September 5, 2017 at 9:30 AM.



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**X. Elite Venue – Cici Rosas**

The BOD needs to determine if we wish to renew our contract with Elite Venue.

Cici Rosas agreed to contact Elite Venue to obtain a proposal to continue the e-mail/newsletter services from 2016-2017, as well as additional proposal for website support. This item will be reviewed at the August 29, 2017 BOD meeting.

Cici has received an informal estimate from Laurie & Elite Venue:

"As discussed, the total website maintenance will be an extra \$100 fee per month. This will include all maintenance and wordpress updates. It will not include website crash fixes. Wordpress is a high maintenance website platform. The theme you are using will need to be updated and Wordpress has to be compatible. We check as much as we can, but sometimes, bugs come up.

If you would like to include banners, flyers and graphics for CALNARPM on unlimited basis it will be an additional \$100 per month. Keeping in mind, some months may be more than others. You can also pay a la carte for design if you want on a pay per basis.

If you choose to do the graphics and website maintenance unlimited for the extra fee of \$200 a month, I will be happy to do 4 email campaigns per month as needed when events need a little extra promotion."

NOTE: Michael will follow up with Elite Venue and find out the "role" they can play in regards to web site support / hosting, registration and payments. He will also discuss the "mini-sponsor" and "save the date" marketing campaign.

**XI. Communication – Bonnye Sirk/Dimitri Amor**

Discussed generating interest in becoming a board member. Possible mini-campaign to with video to show the benefits of service and rewards while dispelling some of the myths about the challenges.

**XII. Legislative – Dana Wares – Discussed offering discounted Webinars.**

**XIII.**

**XIV. Membership – Bonnye Sirk/Dimitri Amor No report.**



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**XV. Old Business** – Cici Rosas **None**

**XVI. New Business** – Bob Davie discussed the need to be proactive in getting Gold, Silver and Bronze sponsors for the conference. Cici is working on a mini-campaign to reach out to the prior sponsors and current sponsors.

**XVII.**

**XVIII. Future Meeting Dates –**

**a. Tuesday, September 26, 2017 @ 9:30 a.m.**

**b. Tuesday, October 31, 2017 @ 9:30 a.m.**

**XIX. Adjournment** – Cici Rosas **10:42 AM**



## **Minutes**

### **2017-2018 Board Meeting**

Tuesday, September 28, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

- I. **Call to Order/Introductions** – *Cici Rosas 9:36 A.M.*
  - a. Present: *Cici Rosas, Cheryl Chase-Berkson, Barbara Barrows, Bob Davie, Matt Borries, Dana Wares, Dimitri Amor, Bonnye Sirk*
  - b. Absent: *Michael Braddon*
- II. **NARPM® Code of Ethics** – *Cici Rosas Cici Rosas read Article 3: Responsibility to Client*

#### **ARTICLE 3 - Responsibility to Client:**

*When working in a disclosed relationship with a client, the Property Manager shall protect the client's best interest at all times.*

**STANDARDS OF PROFESSIONALISM BOD members read Standards of Professionalism individually.**

### **STANDARDS OF PROFESSIONALISM**

- **3-1** The Property Manager shall use written agreements, and written extensions, if required, outlining all responsibilities and fees, if any. The Client will be provided a copy of all signed agreements and extensions, and the Property Manager will retain a copy.
- **3-2** The Property Manager shall communicate regularly with the Client, either orally or in writing and shall provide the Client with written reports as needed and as agreed between all parties. In the event of any dispute, the Property Manager shall provide a written accounting as soon as practical.
- **3-3** Should the Property Manager have a disclosed relationship with a property owner, the Property Manager shall review and verify all Tenant applications to determine the applicant's ability to pay rental fees and to assess the likelihood that the applicant will comply with all provisions of the rental agreement.
- **3-4** The Property Manager shall accept no commissions, rebates, profits, discounts, or any other benefit which has not been fully disclosed to and approved by the Client.
- **3-5** The Property Manager shall not mislead a potential Client about the rental market value of a property in an attempt to secure a rental listing.





**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

- **3-6** The Property Manager shall disclose to his or her Client all pertinent facts relating to any transaction.

**III. Secretary's Report – Barbara Barrows**

Vote needed to approve the Minutes of the August 29, 2017 BOD Meeting. Michael Braddon was not the call, but had asked Barbara Barrows to take minutes for this call and present the Minutes for the August 29, 2017 call. Barbara made a motion to approve the Minutes of the August 29, 2017 BOD Meeting. The motion was seconded by Bob Davie. The vote passed unanimously and the Minutes for the June 27, 2017 BOD Meeting were approved.

**IV. Treasurer's Report – Bob Davie**

Vote needed to approve the Financial Reports ending August 31, 2017: Profit & Loss, Balance Sheet, and Bank Statement. Bob Davie reviewed the financial reports with the BOD members. Cici Rosas made a motion to approve the financials for June 20, 2017. Bob also reported that the Chapter has filed its 2016 tax return; the CPA invoice for that service was \$500.00. Bob reported that the Chapter has paid for its P.O. Box for the next 12 months at a cost of \$160.00. Cheryl Chase-Berkson made a motion to approve the August 31, 2017 financial reports. The motion was seconded by Barbara Barrows. The vote passed unanimously and the August 31, 2017 financial reports were approved.

**V. 2017-2018 Board – Cici Rosas**

There was no further discussion on this issue.



## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

### **VI. Membership Dues – Cici Rosas**

Per the Board's vote at the July 25, 2017 BOD meeting, Cici Rosas and Bonnye Sirk are working on notification to our membership. Dimitri Amor reported that our Welcome Letter has been updated so that dues information (and request for payment) has been removed. Bonnye Sirk reported that the October CALNARPM Newsletter will contain an announcement to members that CALNARPM is able to waive dues for the 2017-2018 Chapter year.

### **VII. CALNARPM Website Support – Cici Rosas**

Cici Rosas reported that Laurie/Elite Venue is having difficulties in gaining access to the server where our website support is based, due to proprietary restrictions that Fourandhalf has. Cici reported that Elite Venue had suggested we move our membership database to Constant Contact. Barbara Barrows suggested that we have Elite Venue supply a file with our 2018 Conference graphics and date/location information to Fourandhalf, and request that they update our Conference page on the website with the 2018 conference information.

### **VIII. CALNARPM 2018 Conference – Cici Rosas**

The Conference Committee has approved the hotel contract with The Riviera in Palm Springs. The Executive Committee of the BOD approved this decision with a vote via e-mail on September 22, 2017. Cici Rosas and Efren Espinoza will work on the menu plan as the date approaches. The Conference Committee will meet again on October 3, 2017 from 9:30-10:30. Barbara Barrows agreed to prepare a task list with a timeline for all committee members and e-mail it to them prior to that meeting.

### **IX. Communication – Bonnye Sirk/Dimitri Amor**

Bonnye reported on the membership dues waiver announcement (see Membership Dues, above) and also noted that another 2017-2018 BOD member will be introduced in the October newsletter. Bonnye also reported that she has an idea for a speaker for the 2018 CALNARPM Conference.

### **X. Legislative – Dana Wares** Dana Wares reported that there are several bills working their way through the Legislature whose intent is to streamline the process for new home builders, with the hope that this will alleviate the housing shortage crisis in California. Dana also reported that Kimball, Tryee and St. John is offering a discount



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

of 25% to CALNARPM members for upcoming webinars; she will e-mail the link/coupon to interested members.

**XI. Membership – Bonny Sirk/Dimitri Amor**

Dimitri Amor reported that the Welcome Letter has been modified (see Membership Dues, above).

**XII. Old Business – Cici Rosas None**

**XIII. New Business – Cici Rosas** Bob Davie suggested that the Board review our contract with Fourandhalf at the October BOD meeting, as this expires October 1, 2017. Barbara Barrows noted that she will start looking for 2019 Conference Committee members in early January 2018.

**XIV. Future Meeting Dates –**

- a. Tuesday, August 29, 2017 @ 9:30 a.m.
- b. Tuesday, September 26, 2017 @ 9:30 a.m.
- c. Tuesday, October 31, 2017 @ 9:30 a.m.

**XV. Adjournment – Cici Rosas 10:40 AM**



## **Minutes 2017 Conference Committee**

Thursday, October 10, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

- I. **Call to Order/Introductions – Cici Rosas**
  - a. Present: Bob Davie, Cheryl Chase-Berkson, Dimitri Amore, Matt Borries, Barbara Barrows, Michael Braddon (arrived at 10:00 AM)
  - b. Absent: Cici Rosas, Efren Espinoza
- II. **Budget – Barbara Barrows**
  - a. Unable to locate Budget for 2017; we will need to build a new one, using the P&L and an old template from Sterling. **This item was not covered.**
- III. **Marketing –**
  - a. **Conference Website –**

We need to get our 2018 Conference page up and running, including registration for both Exhibitors and Members, no later than November 15<sup>th</sup>? Who is working on this – Laurie or FourandHalf? **This item was tabled.**
  - b. **E-blasts –**

Do we have a schedule of e-blasts that Laurie will be sending out, and what do they say? **No discussion**
- IV. **Exhibitor Brochure – This item was tabled.**
  - a. **Access and Proofreading**

We have several questions that must be answered: prices and benefits, floorplan, Early bird deadline, hotel contact, AV requirements, etc.
  - b. **Target Date for Printing and Mailing Out –** If we can get this mailed out by October 31<sup>st</sup>, can our early bird deadline be November 30<sup>th</sup>?
- V. **Education: No discussion on this item.**
  - a. **Call for Presentations – Matt Borries**
  - b. **NARPM Classes**
    - i. We need to choose the classes & how many, and submit our request to National ASAP
  - c. **Keynote speakers No speakers have been approached yet.**

We need to find and contract with three speakers
- VI. **Planning and Timeline – Barbara Barrows**
  - a. **Assigning Tasks to Committee Members**
- VII. **Old business**



**2016-2017 CALNARPM Board of Directors**

*Cheryl Chase-Berkson, President*

*Lisa Fore, 2015-2016 President*

*Barbara Barrows, Secretary*

*Bob Davie, Treasurer*

*Alex Osenenko, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**VIII. New Business** The original Agenda was set aside and the committee held discussion regarding our Chapter President's circumstances: home and possibly business destroyed by Santa Rosa wildfire on October 8-9, 2017. Committee discussed postponing 2018 Conference until May 2018. Motion was made by Michael Braddon and seconded by Cheryl Chase-Berkson to contact the Riviera Hotel in Palm Springs and see if they can move our event to May 16-18, 2018; further that Bob Davie will make that request and contact committee members via e-mail. The committee voted unanimously to follow up this line of inquiry and meet again in two days to find out what actions will be needed.

**IX. Upcoming Meetings**

**a. Conference Committee:** Thursday, October 12<sup>th</sup> at 9:30 AM

**X. Adjournment 10:35 AM**





**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting**

Tuesday, October 31, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

- I. **Call to Order/Introductions** – *Barbara Barrows* *Called to order 9:32AM*
  - a. Present: *Barbara, Cheryl, Bob, Michael, Donna, Bonnie left at 9:40AM Efran Joined*
  - b. Absent: *Dmitri and Bonnie*
- II. **NARPM® Code of Ethics** – *Barbara Barrows*

Article 4: OBLIGATIONS TO TENANTS

*The Property Manager shall treat all Tenants honestly and professionally when they are applying for, living in, and/or vacating a managed residence, including through the deposit refund process.*

*STANDARDS OF PROFESSIONALISM*

- **4-1** The Property Manager shall offer all prospective Tenants a written application.
- **4-2** The Property Manager shall provide all Tenants with a copy of the signed rental agreement and extensions with all addendums attached.
- **4-3** The Property Manager shall make all disclosures as required by state and local laws and provide the Tenant an opportunity to complete a written condition report within 7 days of moving in.
- **4-4** The Property Manager shall respond promptly to requests for repairs.
- **4-5** The Property Manager shall provide a written deposit refund determination to the Tenant within the time prescribed by law after the Tenant has vacated a property. The Property Manager shall not cause any undue delay in refunding or accounting for the security deposit.

**III. Secretary's Report** – *Barbara Barrows/Michael Braddon*

Vote needed to approve the Minutes of the September 26, 2017 BOD Meeting.

*Bonnie made motion to approve, Cheryl seconded. All in favor. Motion approved.*



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**IV. Treasurer's Report – Bob Davie**

Vote needed to approve the financial reports for September 30, 2017. Post office paid in full, Elite Venue paid in full, Hotel cashed \$2,500 check, Taxes done with \$10 filing fee. Cheryl makes motion to approve treasure's report Barbara seconded. Motion approved.

**V. 2017-2018 Board – Barbara Barrows**

A vote is needed to accept the resignation of Cici Rosas as 2017-2018 President; to appoint Barbara Barrows as 2017-2018 President, Michael Braddon as 2017-2018 President-Elect, and Matt Borries as 2017-2018 Secretary. Vote proposed to accept Cici's resignation. Motion proposed by Bob to accept changes referenced above. Motion seconded by Cheryl. Motion approved.

**VI. CALNARPM 2018 Conference Committee – Barbara Barrows**

- A. Budget – Budget reviewed, more to come, to be voted on Nov 30<sup>th</sup>.
- B. Committee Meetings and Timeline – Conference Committee Call set up for 11/2 @ 9:30AM in preparation for Michael's visit to the hotel site.

Michael going to Hotel venue Saturday 11/4 and will hopefully meet with hotel contact and discuss food options and pricing.

**VII. Communication – Bonnye Sirk/Dimitri Amor No updates.**

**VIII. Legislative – Dana Wares Price gouging law, lot of calls coming in. Gov. Brown trying to extend the law to not allow rent increases in all of California for 6 more months.**

**IX. Membership – Bonny Sirk/Dimitri Amor No updates.**



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**X. Old Business – Barbara Barrows**

**No updates**

- XI. New Business – Barbara Barrows** Motion made to renew our website support contract for \$285.60 quarterly. Motion made by Barbara and seconded by Michael. Motion approved. Michael will be point person for all questions or glitches related to CALNARPM Website. Addendum signed with hotel for date change.

**XII. Future Meeting Dates – Michael proposed to change 12/26 meeting to 12/19.**

**a. Tuesday, November 28, 2017 @ 9:30 a.m.**

**b. Tuesday, December 19, 2017 @ 9:30 a.m.**

**XIII. Adjournment – Barbara Barrows Adjourned 10:35AM**



**2017-2018 CALNARPM Board of Directors**

*Barbara Barrows, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Michael Braddon, President-Elect*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting**

Tuesday, November 28, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

- I. Call to Order/Introductions – Barbara Barrows** *Called to order 9:30AM*
- a. Present: **Barbara, Cheryl, Michael, Matt, Bob, Bonnye, Dmitri and Efren**
  - b. Absent: **Dana**

**II. NARPM® Code of Ethics – Barbara Barrows**

***Article 5: CARE OF MANAGED PROPERTIES***

***The Property Manager shall hold a high regard for the safety and health of those lawfully at a managed property and shall manage all properties in accordance with safety and habitability requirements of the local jurisdiction.***

***STANDARDS OF PROFESSIONALISM***

- **5-1** The Property Manager shall not manage properties for Clients who refuse, or are unable, to maintain their property in accordance with safety and habitability requirements of the local jurisdiction.
- **5-2** The Property Manager shall terminate management of a property if the Client does not comply with habitability requirements.

**III. Secretary's Report – Barbara Barrows/Michael Braddon**

Vote needed to approve the Minutes of the October 31, 2017 BOD Meeting.

**Michael made motion to approve, Cheryl seconded. All in favor. Motion approved.**

**IV. Treasurer's Report – Bob Davie**

**No updates.**



**2017-2018 CALNARPM Board of Directors**

*Barbara Barrows, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Michael Braddon, President-Elect*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**V. 2017-2018 Board – Barbara Barrows**

Barbara Barrows is 2017-2018 President, Michael Braddon is 2017-2018 President-Elect, and Matt Borries is 2017-2018 Secretary.

**VI. CALNARPM 2018 Conference Committee – Barbara Barrows**

**Meetings 11/2/2017**

- A. Laurie @ EliteVenu working on – “Save the Date” Postcard & Email Campaign
- B. Laurie @ EliteVenu working on – Exhibitor Brochure & Website
- C. Alex – Fourandhalf.com reduce web hosting cost \$375/M
- D. Suggestion for changing Gold Level Speed Networking – Each exhibitor will give 3-4 minute “elevator speech” to decision makers at the same while wine and appetizers are served.
- E. Possible Keynote Speaker Tim Hoyle – in progress.
- F. Michael visited Riviera Hotel Saturday 11/4/17. Discussed the Floor Plan, Audio/Visual Setup, laptops needs and food costs with Frederick Berry ([fberry@rivierapalmsprings.com](mailto:fberry@rivierapalmsprings.com)) of Riviera Hotel.
- G. Discussed the CALNARPM Party options for Thursday evening.

**Meetings 11/16/2017**

- A. VOTE: Allison Disarro – New Affiliate Chair; BOARD VOTE – ALL YES
- B. Discussed Exhibitor Table Limits (36) Ballroom (26) & Salon III (10)
- C. Matt Borries discussed Classes & Speakers / Call for Presentations
- D. Laurie @ EliteVenu – “Save the date” mailed 11/17/17
- E. Laurie @ EliteVenu – Website up by Mid-December 2017
- F. Keeping Attendee Pricing \$215 / \$245
- G. Michael Braddon to call Letitia Hanke, ARS Roofing @ new Affiliate Chair
- H. Conference Partners: Fourandhalf.com & Seacoast Bank

**VII. Communication – Bonnye Sirk/Dimitri Amor/Efren Espinoza No updates.**

**VIII. Legislative – Dana Wares No updates.**

**IX. Membership – Bonnye Sirk/Dimitri Amor No updates.**





**2017-2018 CALNARPM Board of Directors**

*Barbara Barrows, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Michael Braddon, President-Elect*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**X. Old Business** – Barbara Barrows **No updates.**

**XI. New Business** – **Motion See CALNARPM Conference Committee VI**

**XII. Future Meeting Dates –**  
**a. Tuesday, December 19, 2017 @ 9:30 a.m.**

**XIII. Adjournment** – Barbara Barrows **Adjourned 10:23 AM**



**2017-2018 CALNARPM Board of Directors**

*Barbara Barrows, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Michael Braddon, President-Elect*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting**

Tuesday, December 19, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

**I. Call to Order/Introductions – Barbara Barrows *Called to order 9:32AM***

**a.** Present: **Barbara, Cheryl, Michael, Matt, Dana, Bonnye and Efren**

**b.** Absent: **Bob and Dmitri**

**II. NARPM® Code of Ethics – Barbara Barrows**

***Article 6: HANDLING OF FUNDS***

***The Property Manager shall hold all funds received on behalf of others in compliance with state law and shall not commingle the funds with personal or other business funds or use the funds for other than their intended purposes.***

***STANDARDS OF PROFESSIONALISM***

**6-1** The Property Manager shall keep appropriate records and shall prepare and furnish to the Client accurate and timely financial reports relating to the Client's rental and funds in accordance with the terms of the applicable management agreement.

**III. Secretary's Report – Barbara Barrows/Michael Braddon**

Vote needed to approve the Minutes of the November 28, 2017 BOD Meeting.

**Cheryl made motion to approve treasure's report Bonnye seconded. Motion approved.**

**IV. Treasurer's Report – Bob Davie**

**Cheryl made motion to approve treasure's report Bonnye seconded. Motion approved.**



**2017-2018 CALNARPM Board of Directors**

*Barbara Barrows, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Michael Braddon, President-Elect*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**V. 2017-2018 Board – Barbara Barrows**

Barbara Barrows is 2017-2018 President, Michael Braddon is 2017-2018 President-Elect, and Matt Borries is 2017-2018 Secretary.

**VI. CALNARPM 2018 Conference Committee – Barbara Barrows**

- A. Conference Riviera Palm Springs NOW May 23-25, 2018
- B. (36) Exhibitors & (2) Partners – 10-Gold; 14-Silver; 10-Bronze
- C. Exhibitor Brochure cutoff date 2/15/2018

**Meetings 11/30/2017**

- A. Box.com collaborator access granted Michael Braddon
- B. Exhibitor Brochure Tri-Fold Draft 8<sup>th</sup>; ready by 15<sup>th</sup>
- C. Budget: Exhibitor Revenue \$52K & 160 attendee(s)
- D. VOTE: New Constant Contact account \$35/M; BOARD VOTE – ALL YES
- E. KEYNOTE Speakers: Tim Hoyle & Mark Cunningham

**VII. Communication – Bonnye Sirk/Dimitri Amor/Efren Espinoza No updates.**

**VIII. Legislative – Dana Wares No updates.**

**IX. Membership – Bonnye Sirk/Dimitri Amor No updates.**

**X. Old Business – Barbara Barrows No updates.**

**XI. New Business – Motion See CALNARPM Conference Committee VI**



**2017-2018 CALNARPM Board of Directors**

*Barbara Barrows, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Michael Braddon, President-Elect*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**XII. Future Meeting Dates –**

- a. Tuesday, January 30, 2018 @ 9:30 a.m.

**XIII. Adjournment – Barbara Barrows Adjourned 10:04 AM**

## Michael Braddon

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**From:** Michael Braddon <michael@orionmrinc.com>  
**Sent:** Wednesday, January 17, 2018 4:12 PM  
**To:** 'Bob Davie'; 'Bonnye Sirk'; 'Cheryl Chase-Berkson'; 'Dana Wares'; 'Dimitri Amor'; 'Efren Espinoza'; 'Matt Borries'; 'Allison Disarro'; michael@orionmrinc.com; 'Barbara J. Barrows'  
**Cc:** Lisa Fore; 'Jennifer Newton'  
**Subject:** CALNARPM - EMERGENCY Board Meeting / Conference Committee Meeting - Jan 18th 2017 @ 9:30 AM  
**Attachments:** narpm-california-digital-brochure-conference-2018.pdf  
**Importance:** High  
**Flag Status:** Flagged

CALNARPM Executive Board & Conference Committee – January 18<sup>th</sup> @ 9:30 AM

CALNARPM Call: 605-475-4800 CODE 717633#

I am sad to report that Barbara Barrows has, as of yesterday, had to step down for personal reasons from both Sacramento Delta Property Management and CALNARPM. She is and has been a vital part of CALNARPM. I have asked Cheryl to reach out to her and ask if she would be willing to stay on, in name only, as President.

She deserves to be recognized and acknowledged. I hope she will be able to attend Palm Springs in May 2018.

The good news is we have all the pieces in place and an exceptional team.

Allison, Affiliate Chair, and I have got the affiliates handled. We have our anchor Sponsors. The ability to register and pay online is setup and running; it will go live on our web site by Monday. The Exhibitor Brochure is completed and in PDF format. There will be an Exhibitor MailChimp Campaign next week and Allison is an excellent closer (smile).

Matt, Education Chair / Secretary, has extended the deadline for Call for Presentations to 1/31/2018. He has got a great roster of speakers, instructors, etc. We will be allowing “early bird” attendees register by next week; hopefully live by 25<sup>th</sup>. The Conference Brochure is in good hands with Matt. He can work directly with Laurie at EliteVenue to get it updated, printed and mailed next month.

Bob David, our Treasurer, has been working closely with me and the hotel. We couldn't be in better hands.

I have reached out to Past Presidents Lisa Fore, Jennifer Newton and our own Cheryl Chase-Berkson. I have asked them to help out with the ground game in April / May for getting volunteers lined up for room monitors, how to handle registration, help make sure food services meets expectations, etc. They have all offered their help.

There is also Bonnye, Dana, Dimitri, and Efren who are invaluable and have each stepped up to help.

It is going to be a great conference because of the team effort.

Thank you all,

Michael  
President Elect – CALNARPM 2017-18



p.s. Yes, the rumors are true, I had (back when I was just Secretary, smile) booked a bucket trip. I am headed to New Zealand for 10 days and then Sydney for Mardi Gras; February 16 – March 5<sup>th</sup>, 2018. I have already purchased a new laptop and will be in constant communication with my office and CALNARPM. Before I leave I will have updated everyone including our past Presidents. And, yes, I checked they have WiFi (grin).

Michael Braddon  
Orion Management & Realty, Inc.  
1210 28th Street  
San Diego, CA 92102  
619-992-3196 cell  
619-713-7300 fax  
<http://www.OrionMRInc.com>  
BRE # 01935996

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**From:** Barbara Barrows [mailto:[bbarrows@sacdelta.net](mailto:bbarrows@sacdelta.net)]  
**Sent:** Tuesday, December 19, 2017 7:53 AM  
**To:** Bob Davie; Bonnye Sirk; Cheryl Chase-Berkson ([cheryl@chasepacific.com](mailto:cheryl@chasepacific.com)); Dana Wares; Dimitri Amor; Efren Espinoza; Matt Borries; [michael@orionmrinc.com](mailto:michael@orionmrinc.com)  
**Subject:** CALNARPM - Agenda For Today's Meeting - Dec 2017

Good Morning,

Sorry this is so late, but here is the Agenda for today's BOD meeting. Bob will not be joining us, but I hope you all received his e-mail with the financials. We can vote on those. Matt, can you send us all the Minutes from the November 30<sup>th</sup> meeting?

See you all at 9:30.

Barbara J. Barrows, MPM, RMP  
Supervising Manager  
Sacramento Delta Property Management  
3800 Auburn Blvd, Suite A  
Sacramento, CA 95821  
916-486-7733, ext. 220  
916-483-4088 (fax)  
[bbarrows@sacdelta.net](mailto:bbarrows@sacdelta.net)  
CA BRE #01799101



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting & Conference Committee**

**EMERGENCY MEETING**

*Thursday, January 18, 2018*

*Conference Call 9:30 a.m.*

*Teleconference - Phone number: (605) 475 4800 code: 717633#*

**I. Call to Order/Introductions – Michael Braddon – Acting President**

*Called to order 9:36AM*

**a.** Present: Michael, Matt, Bob, Allison, Bonnye and Efren

**b.** Absent: Cheryl, Dana and Dmitri

**II. NARPM® Code of Ethics – Michael Braddon – President**

***Article 7: AREAS OF EXPERTISE***

***The Property Manager must provide competent service within his or her area of expertise, and refrain from the unauthorized practice of any other profession for which he or she is not licensed or qualified.***

***STANDARDS OF PROFESSIONALISM***

- **7-1** The Property Manager shall perform only such services in such locations for which he or she is qualified and can reasonably be expected to perform with professional competence.

**7-2** The Property Manager shall not perform and shall not represent that he or she can or will perform services outside of his or her area of expertise, particularly services that require a separate license or qualification – such as law, accounting, financial planning, construction, and/or contracting – unless the Property Manager independently possesses such license or qualification.

**III. Secretary's Report – Michael Braddon - President**

*Vote needed to approve the Minutes of the December 19, 2017 BOD Meeting.*

*Michael made motion to approve, Matt seconded. All in favor. Motion approved.*

**IV. Treasurer's Report – Bob Davie**

*No updates.*



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**V. 2017-2018 Board –Michael Braddon –President**

**Barbara Barrows (RESIGNED 1/16/2019) as 2017-2018 President, Michael Braddon is now 2017-2018 (Acting) President**, and Matt Borries is continuing as 2017-2018 Secretary.

I am sad to report that Barbara Barrows has, as of yesterday, had to step down for personal reasons from both Sacramento Delta Property Management and CALNARPM. She is and has been a vital part of CALNARPM. I have asked Cheryl to reach out to her and ask if she would be willing to stay on, in name only, as President.

She deserves to be recognized and acknowledged. I hope she will be able to attend Palm Springs in May 2018.

The good news is we have all the pieces in place and an exceptional team.

Allison, Affiliate Chair, and I have got the affiliates handled. We have our anchor Sponsors. The ability to register and pay online is setup and running; it will go live on our web site by Monday. The Exhibitor Brochure is completed and in PDF format. There will be an Exhibitor MailChimp Campaign next week and Allison is an excellent closer (smile).

Matt, Education Chair / Secretary, has extended the deadline for Call for Presentations to 1/31/2018. He has got an great roster of speakers, instructors, etc. We will be allowing "early bird" attendees register by next week; hopefully live by 25th. The Conference Brochure is in good hands with Matt. He can work directly with Laurie at EliteVenue to get it updated, printed and mailed next month.

Bob David, our Treasurer, has been working closely with me and the hotel. We couldn't be in better hands.

I have reached out to Past Presidents Lisa Fore, Jennifer Newton and our own Cheryl Chase-Berkson. I have asked them to help out with the ground game in April / May for getting volunteers lined up for room monitors, how to handle registration, help make sure food services meets are expectations, etc. They have all offered their help.

There is also Bonnye, Dana, Dimitri, and Efren who are invaluable and have each stepped up to help.

It is going to be a great conference because of the team effort.



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**VI. CALNARPM 2018 Conference Committee – Michael Braddon**

- A. Exhibitor Postcard & Email Campaign. VOTE: ALL APPROVED
- B. Website is LIVE !!
- C. Matt Borries update on Keynote Speakers:
  - Marc Cunningham \$2K
  - Brain Birdy – Closing
  - Tim Hoyle \$3K
- D. Workshops – select 16 out 25 proposals
- E. PSPRINT – Conference Brochure
- F. Changed Gold Level Speed Networking – Each exhibitor will give 3-4 minute “elevator speech” to decision makers at the same while wine and appetizers are served. VOTE: ALL APPROVED

**VII. Communication – Bonnye Sirk/Dimitri Amor/Efren Espinoza No updates.**

**VIII. Legislative – Dana Wares No updates.**

**IX. Membership – Bonnye Sirk/Dimitri Amor No updates.**

**X. Old Business – Barbara Barrows No updates.**

**XI. New Business –Motion See CALNARPM Conference Committee VI**

**XII. Future Meeting Dates –**

- a. Tuesday, January 30, 2018 @ 9:30 AM BOD
- b. Thursday, February 8, 2018 @ 9:30 AM Conference Committee
- c. Monday, March 12, 2018 Past Presidents Call
- d. Wednesday, March 28, 2018 @ 9:30 AM BOD
- e. Thursday, April 12, 2018 @ 9:30 AM Conference Committee

**XIII. Adjournment – Michael Braddon Adjourned 10:30 AM**



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting & Conference Committee**

Tuesday, January 30, 2018

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

**I. Call to Order/Introductions – Michael Braddon – Acting President**

Called to order 9:30 AM

a. Present: Michael, Cheryl, Matt, Dmitri and Efren; Cici - Volunteer

b. Absent: Bob, Bonnye, Dana and Allison

**II. NARPM® Code of Ethics – Michael Braddon – President**

***Article 8: COMMITMENT TO FIRM***

***The Property Manager shall act in the best interests of his or her property management Firm.***

***STANDARDS OF PROFESSIONALISM***

- **8-1** The Property Manager shall not have any undisclosed conflict of interest with his or her Firm. If a conflict or potential conflict should arise, the Property Manager shall notify his or her Firm immediately.
- **8-2** The Property Manager shall not receive any form of compensation, rebates, or any other benefits without full disclosure to his or her Firm.
- **8-3** The Property Manager may not take or use any proprietary documentation, including but not limited to Client/Tenant lists, during or after his or her relationship with a Firm without express written consent from the Firm.

**III. Secretary's Report – Michael Braddon - President**

Vote needed to approve the Minutes of the January 18, 2018 BOD Meeting.

Michael made motion to approve, Matt seconded. All in favor. Motion approved.

**IV. Treasurer's Report – Bob Davie**

No updates.

**V. 2017-2018 Board – Michael Braddon – President**





**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

- A. Gail Phillips Called – NARPM CEO 1/29/2018
- B. Bonnye Sirk, Conference Chair VOTE: ALL APPROVED
- C. NOTE: Removed Cici from future invitations; resigned
- D. Registration LIVE as of 1/31/2018
- E. Matt Borries ... possible President-Elect next year !!
- F. NARPM Classes now registered
- G. Vendor postcard MAILED
- H. NOTE: PM Grow Conference: 1/31 to 2/2 in downtown San Diego

**VI. CALNARPM 2018 Conference Committee – Michael Braddon**

- A. No Updates.

**VII. Communication – Bonnye Sirk/Dimitri Amor/Efren Espinoza No updates.**

**VIII. Legislative – Dana Wares No updates.**

**IX. Membership – Bonnye Sirk/Dimitri Amor No updates.**

**X. Old Business – Barbara Barrows No updates.**

**XI. New Business –Motion See CALNARPM Conference Committee VI**

**XII. Future Meeting Dates –**

- a. Thursday, February 8, 2018 @ 9:30 AM Conference Committee
- b. Monday, March 12, 2018 Past Presidents Call
- c. Wednesday, March 28, 2018 @ 9:30 AM BOD
- d. Thursday, April 12, 2018 @ 9:30 AM Conference Committee
- e. Thursday, April 26, 2018 @ 9:30 AM BOD
- f. Thursday, May 8, 2018 @ 9:30 AM Conference Committee
- g. Thursday, May 15, 2018 @ 9:30 AM Conference Committee
- h. Thursday, May 31, 2018 @ 9:30 AM BOD



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

XIII. **Adjournment** – Michael Braddon **Adjourned 10 AM**



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting & Conference Committee**

Wednesday, March 28, 2018

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

**I. Call to Order/Introductions – Michael Braddon – Acting President**

Called to order 9:30 AM

**a.** Present: Michael, Cheryl, Matt, Bob, Bonnye, Allison, Dmitri and Efren

**b.** Absent: Dana

**II. NARPM® Code of Ethics – Michael Braddon – President**

***Article 9: RELATIONS WITH OTHER PROPERTY MANAGERS***

***The Property Manager shall not knowingly or recklessly make false or misleading statements about other property managers or their business practices, or otherwise attempt to take business from other property managers by deceptive means.***

***STANDARDS OF PROFESSIONALISM***

- **9-1** The Property Manager shall deal with other property managers in an honest and professional manner and shall not knowingly engage in any practice or take any action against a property manager in an un-businesslike manner.
- **9-2** The Property Manager shall not knowingly interfere with other property managers' contract rights, including by taking actions inconsistent with exclusive agreements that other property managers have with their clients. This does not preclude the Property Manager from otherwise soliciting potential Clients or making general announcements about his or her own services. For purposes of this Code, a general announcement may be defined as a general telephone canvass or a general mailing or distribution addressed to all prospects in a given geographical area or in a specific profession, business, club, organization, or other classification or group. This Code does not restrict fair and reasonable competition among property managers.
- **9-3** In the event of a controversy between Property Managers with different Firms, the Property Manager of the Firm shall use best efforts to resolve the dispute prior to litigation.
- **9-4** The Property Manager shall not obtain or use the proprietary materials or work of a competing management Firm without the express written permission of that Firm.
- **9-5** The Property Manager shall cooperate with other property managers when it is in the best interests of the Client or Tenant to do so.



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**III. Secretary's Report – Michael Braddon - President**

Vote needed to approve the Minutes of the January 30, 2018 BOD Meeting.

Michael made motion to approve, Matt seconded. All in favor. Motion approved.

**IV. Treasurer's Report – Bob Davie**

No updates.

**V. 2017-2018 Board –Michael Braddon –President**

- A. Affiliate Update: ONLY 7 tables LEFT !!
- B. Eblast(s) @ Conference handled by Laurie @ EliteVenu
- C. Personalized Letter to California Membership
- D. PSPRINT – Conference Brochure April 3-5<sup>th</sup>
- E. Site Visit by Bonnye, Conference Chair, materials from Cici

**VI. CALNARPM 2018 Conference Committee – Michael Braddon**

**Thursday, February 8, 2018 @ 9:30 AM Conference Committee**

- A. Keep Early Bird open to March 1, 2018 (16 tables left; (3) Gold left
- B. App for iPhone/Android VOTE: ALL NO
- C. Workshops (16) VOTE: ALL APPROVED
- D. Speaker – Marc – PM 101 topic
- E. Speaker – Brian Birdy – Must haves for PM 2018
- F. Speaker – Tim Hoyle – Maximizing Talent

**Monday, March 12, 2018 Past Presidents Call**

- A. Lisa Fore – Speed Networking
- B. Cheryl Chase-Berkson – Review board minutes; Hold new elections
- C. Jennifer Newton – not involved (other commitments)



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**VII. Communication** – Bonnye Sirk/Dimitri Amor/Efren Espinoza **No updates.**

**VIII. Legislative** – Dana Wares **No updates.**

**IX. Membership** – Bonnye Sirk/Dimitri Amor **No updates.**

**X. Old Business** – Barbara Barrows **No updates.**

**XI. New Business** – **Motion See CALNARPM Conference Committee VI**

**XII. Future Meeting Dates** –

- a. **Thursday, April 12, 2018 @ 9:30 AM Conference Committee**
- b. **Thursday, April 26, 2018 @ 9:30 AM BOD**
- c. **Thursday, May 8, 2018 @ 9:30 AM Conference Committee**
- d. **Thursday, May 15, 2018 @ 9:30 AM Conference Committee**
- e. **Thursday, May 31, 2018 @ 9:30 AM BOD**

**XIII. Adjournment** – Michael Braddon **Adjourned 10:30 AM**





**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting & Conference Committee**

Wednesday, April 26, 2018

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

**I. Call to Order/Introductions – Michael Braddon – Acting President**

Called to order 9:30 AM

a. Present: Michael, Cheryl, Matt, Bob, Bonnye, and Allison

b. Absent: Dana, Dmitri and Efren

**II. NARPM® Code of Ethics – Michael Braddon – President**

***Article 10: TRUTH IN ADVERTISING***

***The Property Manager shall ensure that all advertising is clear and forthright and includes only accurate and truthful statements about the property or services advertised.***

***STANDARDS OF PROFESSIONALISM***

- **10-1** Regardless of the type of media used, advertising content shall be truthful and honest at all times.
- **10-2** No property shall be offered as “For Rent” without the actual permission of the Client. If an unlisted property is offered, permission must be obtained from the owner.
- **10-3** Disclosure must be made to all parties if information gathered through electronic advertising media may be sold to an outside party.
- **10-4** All marketing materials, whether printed or electronic, shall comply with state laws.

**III. Secretary’s Report – Michael Braddon - President**

Vote needed to approve the Minutes of the March 28, 2018 BOD Meeting.

Michael made motion to approve, Matt seconded. All in favor. Motion approved.

**IV. Treasurer’s Report – Bob Davie**

No updates.



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**V. 2017-2018 Board –Michael Braddon –President**

**A. Next Year:**

- Elite Venue New Contract
- Change Web Server
- Secure rights to [www.calnarpm.org](http://www.calnarpm.org) from Hero PM
- Next Conference in Napa, CA: Marriott April 24-26, 2019
- Affiliates as Room Monitors !!!

**B. This Year:**

- (36) Affiliate Sponsorships SOLD OUT !!!
- (180+) Attendee(s)

**VI. CALNARPM 2018 Conference Committee – Michael Braddon**

**Thursday, April 12, 2018 @ 9:30 AM Conference Committee**

- A. Attendee Brochures – MAILED, ETC
- B. Affiliates – ONLY (4) Silver Left \$1500
- C. Rooms for Speakers
- D. Banners & Food w/ Exhibitors !!!
- E. Email Blasts continue w/ Laurie & EliteVenu
- F. Personalized Letter EMAILED to each California NARPM member !!!
- G. Party sponsored by FilterEasy (Shannon); \$2K
- H. Board Suite Meeting Space provide by Bonnye
- I. Next year: Marriott Napa April 24-26<sup>th</sup>, 2019
- J. Chapter compliance / Excellence – Michael Braddon Volunteered
  - NOTE: BOD/Conference Committee deeply grateful to Bob Davie for several years of handing and awarded Chapter Excellence !!
- K. New Logo Requirements from National NARPM for State/Local Chapters

**VII. Communication – Bonnye Sirk/Dimitri Amor/Efren Espinoza No updates.**

**VIII. Legislative – Dana Wares No updates.**

**IX. Membership – Bonnye Sirk/Dimitri Amor No updates.**



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

X. **Old Business** – Barbara Barrows **No updates.**

XI. **New Business** – **Motion See CALNARPM Conference Committee VI**

XII. **Future Meeting Dates –**

a. **Thursday, May 8, 2018 @ 9:30 AM Conference Committee**

b. **Thursday, May 8 & 15, 2018 @ 9:30 AM Conference Committee**

c. **Thursday, May 31, 2018 @ 9:30 AM BOD**

XIII. **Adjournment** – Michael Braddon **Adjourned 10:30 AM**



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**Minutes  
CALNARPM Annual Meeting**

Riviera Hotel Palm Springs

Thursday, May 24, 2018

12:45 p.m.

- I. **Call to Order/Introductions** – *Cheryl Chase Berkson 12:45 PM*
- II. **Secretary's Report** – *Matt Borries*
  - a. ***Voting Action Required*** - approval of the Minutes from the April 13, 2017 state chapter meeting held in San Diego, California **Motion was made by Michael to approve the Minutes from April 13, 2017. The motion was seconded by Cheryl. Vote was passed unanimously and the Minutes approved.**
- III. **Treasurer's Report** – *Bob Davie*
  - a. ***Voting Action Required*** – approval of the July 1, 2016 – June 30, 2017 Financials **Motion was made by Michael to approve the 07/01/2016-06/30/2017 Financials. Motion was seconded by Cheryl. The vote was passed unanimously and the Financials for 07/01/2016-06/30/2017 approved.**
- IV. **New Business** – *Cheryl Chase-Berkson*
  - a. CALNARPM earned Chapter Excellence in 2018.
  - b. How can you help CALNARPM with the combined Chapter Compliance/Excellence Award for the upcoming year?
    - i. Email us and let CALNARPM know if you are a candidate for any designations
    - ii. Email us and let us know if you have had an article published in *Residential Resource*
    - iii. Sign up for Leadership Classes
    - iv. Send us a copy of the certificate you receive when you complete a NARPM course
- V. **Old Business** – *Cheryl Chase-Berkson*
  - a. Elections for new Board positions will be held next month via email
    - i. Always looking for new and fresh ideas to contribute so please consider volunteering for the next term which begins July 1<sup>st</sup>. Email Sterling or any member of the Executive Committee if you are interested.
- VI. **Adjournment 1:00 PM**



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**Minutes**

**2017-2018 Board Meeting & Conference Committee**

Thursday, May 31, 2018

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

**I. Call to Order/Introductions – Michael Braddon – Acting President**

Called to order 9:30 AM

a. Present: Michael, Cheryl, Matt, Bob, Bonnye, and Allison

b. Absent: Dana, Dimitri and Efren

**II. NARPM® Code of Ethics – Michael Braddon – President**

***Article 11: RESPONSIBILITY TO NARPM® AND THE PROFESSION***

***The Property Manager shall comply with all policies and pronouncements of NARPM® and all relevant laws and rules of the jurisdiction in which he or she works, and shall strive to stay informed of and to educate others about relevant matters affecting the property management field.***

***STANDARDS OF PROFESSIONALISM***

- **11-1** The Property Manager shall strive to improve the property management profession and NARPM® by sharing with others his or her lessons of experience for the benefit of all.
- **11-2** The Property Manager shall strive to be informed about relevant matters affecting the property management field on a local, state, and national level.
- **11-3** The Property Manager shall maintain his or her real estate license, if a license is required in their state.
- **11-4** The Property Manager shall abide by NARPM®'s bylaws and any other policies and procedures of NARPM®, and shall do no harm to the organization.

**11-5** The Property Manager shall ensure that all electronic communications and marketing he or she prepares is professional with respect given to the recipients.

**III. Secretary's Report – Michael Braddon - President**

Vote needed to approve the Minutes of the April 26, 2018 BOD Meeting.

Michael made motion to approve, Matt seconded. All in favor. Motion approved.





**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

**IV. Treasurer's Report – Bob Davie**

**Palm Springs Conference Initial Financial Report.**

**A. Income \$97K, Expenses \$62.5K; Net Income \$35K**

- Hotel expenses \$37.8K
- Speaker Fees \$4K
- Printing costs \$4K
- Audio/Visual \$15K
- Other \$1.7K

**V. 2017-2018 Board –Michael Braddon –President**

**A. BOD slate of candidates to send out for email VOTE in 30 days**

- Michael Braddon, President
- Matt Borries, President-Elect
- Cheryl-Honorary Past President
- Bob Davie, Treasurer
- Donna Gary, Secretary

**B. Allison Disarro / Bonnye Sending Exhibitor Thank You(s) !!**

**C. Prepare 2019 Registration w/ Laurie @ EliteVenu**

**D. Next Year:**

- Elite Venue New Contract
- Change Web Server later in 2018
- Secure rights to [www.calnarpm.org](http://www.calnarpm.org) from Hero PM
- Next Conference in Napa, CA: Marriott April 24-26, 2019
- Affiliates as Room Monitors !!!

**E. This Year:**

- (36) Affiliate Sponsorships SOLD OUT !!!
- (180+) Attendee(s)

**VI. CALNARPM 2018 Conference Committee – Michael Braddon**

**Thursday, May 8 & 15, 2018 @ 9:30 AM Conference Committee**

**A. Bringing extra LCD Projector**

**B. Volunteers bringing Laptops for workshops and main banquet room**

**C. Presidents Gifts (Michael) & Reception (Bonnye)**

**D. Food Menu(s) - Bonnye handling**



**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*

- E. Scripts provided by Cheryl
- F. NOTE: Over 170+ attendee(s) signed up before conference
- G. Room Monitors – Gold/Silver Exhibitors who Volunteer
- H. Chapter Gifts – Raffle at Conference
- I. List of Attendees PRINTED NOTE: CANNOT BE EMAILED LEGALLY !!!
- J. Speaker Certificates
- K. Graphic for Napa Marriott April 24-26, 2019

**VII. Communication** – Bonnye Sirk/Dimitri Amor/Efren Espinoza **No updates.**

**VIII. Legislative** – Dana Wares **No updates.**

**IX. Membership** – Bonnye Sirk/Dimitri Amor **No updates.**

**X. Old Business** – Barbara Barrows **No updates.**

**XI. New Business** – **Motion See CALNARPM Conference Committee VI**

**XII. Future Meeting Dates** –

- a. Tuesday, June 12, 2018 @ 9:30 AM Conference Committee
- b. Dark in July 2019
- c. Wednesday, Next New BOD Meeting August 15, 2018 @ 9:30 AM

**XIII. Adjournment** – Michael Braddon **Adjourned 10:30 AM**

**2017-2018 CALNARPM Board of Directors**

*Michael Braddon, Acting President*

*Barbara Barrows (Resigned), President*

*Cheryl Chase-Berkson, 2016-2017 Past President*

*Matt Borries, Secretary*

*Bob Davie, Treasurer*

*Allison Disarro, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

*Efren Espinoza, Communications Co-Director*



2016-2017 CALNARPM Board of Directors

Cheryl Chase-Berkson, President

Lisa Fore, 2015-2016 President

Barbara Barrows, Secretary

Bob Davie, Treasurer

Alex Osenenko, Affiliate Director

Matt Borries, Education Director

Dana Wares, Legislative Director

Bonnye Sirk, Membership/Communications Co-Director

Dimitri Amor, Membership/Communications Co-Director

## Minutes

### 2016-2017 Board Meeting

Tuesday, June 27, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

- I. **Call to Order/Introductions** – Cheryl Chase-Berkson 9:30 a.m.
  - a. Present: Cheryl Chase-Berkson, Lisa Fore, Cici Rosas, Bob Davie, Dana Wares, Bonnye Sirk, Dimitri Amor
  - b. Absent: Alex Osenenko, Matt Borries, Barbara Barrows
  - c. Staff: n/a
- II. **NARPM® Code of Ethics** – Cheryl Chase-Berkson Cheryl Chase-Berkson read Article 8 aloud to members on the call, as well as the Standard of Professionalism 6-1.

- **Article 8: COMMITMENT TO FIRM**
- *The Property Manager shall act in the best interests of his or her property management Firm.*
- **STANDARDS OF PROFESSIONALISM**
- **8-1** The Property Manager shall not have any undisclosed conflict of interest with his or her Firm. If a conflict or potential conflict should arise, the Property Manager shall notify his or her Firm immediately.
- **8-2** The Property Manager shall not receive any form of compensation, rebates, or any other benefits without full disclosure to his or her Firm.
- **8-3** The Property Manager may not take or use any proprietary documentation, including but not limited to Client/Tenant lists, during or after his or her relationship with a Firm without express written consent from the Firm.

- III. **Secretary's Report** – N/A
  - a. The minutes for the past meeting were not received by any of the present board members.
  - b. Dimitri Amor volunteered to document the minutes for this meeting.
- IV. **Treasurer's Report** – Bob Davie
  - a. Bob reviewed the profit and loss, balance sheet and the statement of accounts.
  - b. The majority of the expenses were conference related.
  - c. We have not filed the 2016 taxes. Bob filed for an extension. Cost to have an accountant



**2016-2017 CALNARPM Board of Directors**

*Cheryl Chase-Berkson, President*

*Lisa Fore, 2015-2016 President*

*Barbara Barrows, Secretary*

*Bob Davie, Treasurer*

*Alex Osenenko, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

review is \$500.00.

d. Reviewed Paypal transaction charges. Bob provided a report directly from Paypal

e. Bob consolidated the chart of accounts.

f. There are two additional deposits that will be made in July 2017. The first from NARPM national for education in the amount of \$918.98. The second from Ernst and Haas for the conference in the amount of \$1800.00.

g. Taking the two additional deposits into consideration, we should have around \$1000 at the close of the tax year.

h. Board approved Bob's report formally at 10:11 AM.

V. **Communication** – *Bonnye Sirk/Dimitri Amor: Nothing new to report.*

VI. **Legislative** – *Dana Wares: Dana sent a new legal update. Also discussed Dana researching education courses to offer CAL NARPM members. Dana advised that her firm focuses on education when evictions are down.*

VII. **Old Business** – *Cheryl Chase-Berkson: N/A*

VIII. **New Business** – *Cheryl Chase-Berkson*

a. **2017-2018 Membership Dues – when do we start working on this?** Discussion was held on the question of waiving dues for 2017-2018. It was agreed, as Cheryl's final act as president, that a committee be formed to evaluate the pros and cons of membership dues. The members of the committee are as follows: Cici Rosas, Bonnye Sirk, and Bob Davies. The board agreed to withhold the decision until July 27, 2017.

b. **2017-2018 BOD Positions – when do we start working on this?** Lisa Fore received five Self-Nomination forms. Lisa Fore and Cheryl Chase-Berkson agreed to review the forms separately and come to a decision regarding the forms. They plan to arrive at a decision around July 7, 2017. The board approved this decision.

IX. **Future Meeting Date:**

a. **Tuesday, July 25 A.M. 2017 at 9:30 a.m.**

X. **Adjournment 10:26 AM.**





## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

## **Minutes**

### **2017-2018 Board Meeting**

Tuesday, July 25, 2017

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

#### **I. Call to Order/Introductions – Cici Rosas 9:33 A.M.**

- a. Present: Cici Rosas, Cheryl Chase-Berkson, Barbara Barrows, Bob Davie, Michael Braddon, Matt Borries, Dana Wares, Lisa Fore
- b. Absent: Dimitri Amor, Bonnye Sirk

#### **II. NARPM® Code of Ethics – Cici Rosas Cici Rosas read Article 1: Responsibility to Protect the Public aloud to the BOD members.**

##### **Article 1: RESPONSIBILITY TO PROTECT THE PUBLIC**

***The Property Manager shall protect the public against fraud, misrepresentation, and unethical practices in property management.***

##### **STANDARDS OF PROFESSIONALISM BOD members read Standards of Professionalism individually.**

- **1-1** The Property Manager shall endeavor to eliminate, through the normal course of business, any practices which could be damaging to the public or bring discredit to the profession.
- **1-2** The Property Manager shall cooperate with the governmental agency charged with regulating the practices of Property Managers.
- **1-3** The Property Manager shall comply with all relevant local and state ordinances regarding real estate law, licensing, insurance, and banking.
- **1-4** The Property Manager shall comply with all federal and state antitrust laws and shall follow the NARPM® Antitrust Policy and any related procedures.
- **1-5** The Property Manager shall not reveal confidential information of Clients, Tenants or others except as required in the course of performing his or her duties or as otherwise required by law. The Property Manager shall take all reasonable precautions to protect confidential information.
- **1-6** The Property Manager shall use reasonable efforts to ensure that information on his or her website, or that of his or her Firm, is current and accurate. If it becomes apparent that information on the website is not current or accurate, then the Property Manager shall promptly take corrective action.
- **1-7** Websites of the Property Manager shall not contain any deceptive metatags or other devices/methods to direct, drive, or divert Internet traffic in a deceptive manner or to otherwise



## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

mislead users. The websites shall also not manipulate listing content in any deceptive or misleading way.

- **1-8** The Property Manager shall disclose all details on the availability of rental properties to prospective parties on a regular and timely basis.
- **1-9** The Property Manager shall not exaggerate, misrepresent, misinform, or conceal pertinent facts in the advertising, leasing, and management of property.
- **1-10** The Property Manager shall make reasonable attempts to remove from the Internet listings for rentals that are no longer available.

### **III. Secretary's Report – Barbara Barrows/Michael Braddon**

Vote needed to approve the Minutes of the June 27, 2017 BOD Meeting. **Barbara Barrows made a motion to approve the Minutes of the June 27, 2017 BOD Meeting. The motion was seconded by Cheryl Chase-Berkson. The vote passed unanimously and the Minutes for the June 27, 2017 BOD Meeting were approved.**

### **IV. Treasurer's Report – Bob Davie**

Vote needed to approve the YE Financial Reports: Profit & Loss, Balance Sheet, Bank Statement for June 30, 2017. **Bob Davie reviewed the financial reports with the BOD members. Cici Rosas made a motion to approve the financials for June 30, 2017. The motion was seconded by Cheryl Chase-Berkson. The vote passed unanimously and the June 30, 2017 financial reports were approved.**

### **V. 2017-2018 Board – Cici Rosas**

The Executive Committee members are appointed (President, Immediate Past President, President-Elect, Secretary, Treasurer). What action is needed to finalize Director positions: Affiliate, Education, Legislative, Membership, Communications? **The BOD discussed the appointment of Curt Bulloch to the Affiliate Director position. Cici Rosas agreed to reach out to Curt and confirm his interest. BOD agreed to vote on his appointment at the August 29, 2017 BOD meeting. Cici Rosas also agreed to reach out to Efren Espinoza regarding his Self-Nomination form and find out how he would like to serve this year. Cici will invite both Curt and Efren to attend the August 29, 2017 BOD conference call.**



## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

## **VI. Membership Dues – Cici Rosas**

The Dues Committee met via conference call on 7/13/17 and made the decision to waive annual membership fees for the 2017-2018 year. The Board needs to vote to adopt or decline this decision. The National offices need to be notified, and we need an updated National membership list in order to send out an e-mail to all California-based NARPM members. **Barbara Barrows reported to the BOD the activities of the Membership Dues committee, as follows:**

- The committee members are Barbara Barrows, Cici Rosas, Bonnye Sirk, Bob Davie
- The committee met via conference call on July 13, 2017
- Bonnye Sirk was not able to be on the call
- The committee members discussed the pros and cons of both keeping annual dues and waiving annual dues (for 2017 only).
- The findings of the committee were that a.) only a small fraction of NARPM members who are operating as Property Managers in California paid dues last year; b.) the amount of funds collected in dues was offset by the cost to pay an Executive Director for billing, collecting, tracking and documenting payments received; c.) the amount of revenue lost by waiving annual dues can be recouped through increased attendance at the annual Conference/Trade Show, and by eliminating the cost of an E.D. to facilitate collection of dues.

The Membership Dues committee's recommendation was that annual dues be waived for 2017, with the agreement that this issue can be revisited in future if necessary. Cici Rosas made a motion to accept the committee's recommendation to waive CALNARPM membership dues for 2017. The motion was seconded by Barbara Barrows. The vote passed unanimously.

## **VII. CALNARPM Website Support – Cici Rosas**

Our website support has been provided by Alex Osenenko. Is he going to be available to do this in the upcoming year? We will need to have our CALNARPM 2018 Conference page created and launched as soon as possible. If Alex will not be doing this in the upcoming year, the Board needs to come up with an alternate plan. **Cici Rosas reported that Alex Osenenko has agreed to submit a proposal to the CALNARPM BOD for website support for 2017.**



## **2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

### **VIII. CALNARPM 2018 Conference Committee – Cici Rosas**

A committee needs to be formed prior to our next BOD meeting. This committee is tasked with planning the next CALNARPM Conference. Cici Rosas, Barbara Barrows, Cheryl Chase-Berkson, Bob Davie and Matt Borries all agreed to be on the 2018 CALNARPM Conference planning committee. It was further agreed that the first meeting of the committee will be on Tuesday, August 8, 2017 at 9:30 AM. The topics for this first meeting will be date and location. Further it was agreed that the committee shall have a second meeting on August 22, 2017 at 9:30 AM and the topics at that meeting shall be budget and timeline.

### **IX. Elite Venue – Cici Rosas**

The BOD needs to determine if we wish to renew our contract with Elite Venue. Cici Rosas agreed to contact Elite Venue to obtain a proposal to continue the e-mail/newsletter services from 2016-2017, as well as additional proposal for website support. This item will be reviewed at the August 29, 2017 BOD meeting.

### **X. Communication – Bonnye Sirk/Dimitri Amor No report**

### **XI. Legislative – Dana Wares Dana Wares reported that, with the California Legislative session on Summer break, there are no new bills to report. Dana reported that the City of Concord is still meeting to decide on rent control measures and so far have voted to approve a measure requiring landlords to notify their tenants that they have a right to mediation if given a notice of rent increase.**

### **XII. Membership – Bonnye Sirk/Dimitri Amor No report.**



**2017-2018 CALNARPM Board of Directors**

*Cici Rosas, President*

*Cheryl Chase-Berkson, 2016-2017 President*

*Barbara Barrows, President-Elect*

*Michael Braddon, Secretary*

*Bob Davie, Treasurer*

*, Affiliate Director*

*Matt Borries, Education Director*

*Dana Wares, Legislative Director*

*Bonnye Sirk, Membership/Communications Co-Director*

*Dimitri Amor, Membership/Communications Co-Director*

**XIII. Old Business** – Cici Rosas **None**

**XIV. New Business** – Cici Rosas **Barbara Barrows reported that she will contact Secretary Michael Braddon with information on the tasks that the Secretary position has been responsible for.**

**XV. Future Meeting Dates –**  
**a. Tuesday, August 29, 2017 @ 9:30 a.m.**  
**b. Tuesday, September 26, 2017 @ 9:30 a.m.**  
**c. Tuesday, October 31, 2017 @ 9:30 a.m.**

**XVI. Adjournment** – Cici Rosas **10:40 AM**



**Caution:** Forms printed from within Adobe Acrobat products may not meet IRS or state taxing agency specifications. When using Acrobat 9.x products and later products, select "None" in the "Page Scaling" selection box in the Adobe "Print" dialog.

CLIENT'S COPY

OLIVA, GODDARD & WRIGHT  
CERTIFIED PUBLIC ACCOUNTANTS  
9333 GENESEE AVE STE 110  
SAN DIEGO, CA 92121  
(858) 554-0800

MARCH 13, 2018

CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGERS  
16516 BERNARDO CENTER DR, SUITE 330  
SAN DIEGO, CA 92128

DEAR BOB:

ENCLOSED ARE THE ORIGINAL AND ONE COPY OF THE 2017 EXEMPT  
ORGANIZATION RETURNS, AS FOLLOWS...

2017 FORM 990-EZ

2017 CALIFORNIA FORM 199

EACH ORIGINAL SHOULD BE DATED, SIGNED AND FILED IN ACCORDANCE  
WITH THE FILING INSTRUCTIONS. THE COPY SHOULD BE RETAINED  
FOR YOUR FILES.

VERY TRULY YOURS,

OLIVA, GODDARD & WRIGHT  
CERTIFIED PUBLIC ACCOUNTANTS

## Filing Instructions

**Prepared for:**

CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGER  
16516 BERNARDO CENTER DR, SUITE 330  
SAN DIEGO, CA 92128

**Prepared by:**

OLIVA, GODDARD & WRIGHT, CPAS  
9333 GENESEE AVE, STE 110  
SAN DIEGO, CA 92121

2017 FORM 990-EZ

**ELECTRONIC FILING:**

THIS RETURN HAS BEEN PREPARED FOR ELECTRONIC FILING. IF YOU WISH TO HAVE IT TRANSMITTED ELECTRONICALLY TO THE IRS, PLEASE SIGN, DATE, AND RETURN FORM 8879-EO TO OUR OFFICE. WE WILL THEN SUBMIT THE ELECTRONIC RETURN TO THE IRS. DO NOT MAIL A PAPER COPY OF THE RETURN TO THE IRS. RETURN FORM 8879-EO TO US BY MAY 15, 2018.

2017 CALIFORNIA FORM 199

YOU HAVE A BALANCE DUE OF .....\$ 10.00

THE CALIFORNIA FORM 199 RETURN HAS BEEN PREPARED FOR ELECTRONIC FILING. IF YOU WISH TO HAVE IT TRANSMITTED ELECTRONICALLY TO THE FTB, PLEASE SIGN, DATE AND RETURN FORM 8453-EO TO OUR OFFICE. WE WILL THEN SUBMIT THE ELECTRONIC RETURN TO THE FTB. DO NOT MAIL THE PAPER COPY OF THE RETURN TO THE FTB.

SEPARATELY MAIL CALIFORNIA FORM FTB 3586 WITH A CHECK OR MONEY ORDER FOR \$10.00, PAYABLE TO FRANCHISE TAX BOARD ON OR BEFORE MAY 15, 2018.

MAIL TO - FRANCHISE TAX BOARD  
PO BOX 942857  
SACRAMENTO CA 94257-0531

\*\*\*\*\* THIS IS NOT A FILEABLE COPY \*\*\*\*\*

# IRS e-file Signature Authorization for an Exempt Organization

OMB No. 1545-1878

Form **8879-EO**

For calendar year 2017, or fiscal year beginning \_\_\_\_\_, 2017, and ending \_\_\_\_\_, 20\_\_\_\_

**2017**

Department of the Treasury  
Internal Revenue Service

▶ Do not send to the IRS. Keep for your records.

▶ Go to [www.irs.gov/Form8879EO](http://www.irs.gov/Form8879EO) for the latest information.

Name of exempt organization

**CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGERS**

Employer identification number

**20-1862735**

Name and title of officer

**BOB DAVIE  
TREASURER**

## Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. Do not complete more than 1 line in Part I.

1a Form 990 check here ▶ <input type="checkbox"/>	b Total revenue, if any (Form 990, Part VIII, column (A), line 12) .....	1b	
2a Form 990-EZ check here ▶ <input checked="" type="checkbox"/>	b Total revenue, if any (Form 990-EZ, line 9) .....	2b	<b>62,322.</b>
3a Form 1120-POL check here ▶ <input type="checkbox"/>	b Total tax (Form 1120-POL, line 22) .....	3b	
4a Form 990-PF check here ▶ <input type="checkbox"/>	b Tax based on investment income (Form 990-PF, Part VI, line 5) .....	4b	
5a Form 8868 check here ▶ <input type="checkbox"/>	b Balance Due (Form 8868, line 3c) .....	5b	

## Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2017 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

☒ I authorize **OLIVA, GODDARD & WRIGHT, CPAS** to enter my PIN **62735**  
ERO firm name Enter five numbers, but do not enter all zeros

as my signature on the organization's tax year 2017 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☐ As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2017 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ \*\*\*\*\* THIS IS NOT A FILEABLE COPY \*\*\* Date ▶ \_\_\_\_\_

## Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

**33767805201**

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2017 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ \_\_\_\_\_ Date ▶ **03/13/18**

**ERO Must Retain This Form - See Instructions  
Do Not Submit This Form to the IRS Unless Requested To Do So**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8879-EO** (2017)

723051 10-11-17

13120313 784697 CALNARPM

2017.03000 CALIFORNIA STATE CHAPTER OF CALNARP1

Form **990-EZ****Short Form**  
**Return of Organization Exempt From Income Tax**

OMB No. 1545-1150

**2017**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to [www.irs.gov/Form990EZ](http://www.irs.gov/Form990EZ) for instructions and the latest information.Department of the Treasury  
Internal Revenue ServiceOpen to Public  
Inspection**A For the 2017 calendar year, or tax year beginning****and ending**

- B** Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

**C Name of organization****CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGERS****Number and street (or P.O. box, if mail is not delivered to street address)****16516 BERNARDO CENTER DR, SUITE 330****Room/suite****City or town, state or province, country, and ZIP or foreign postal code****SAN DIEGO, CA 92128****D Employer identification number****20-1862735****E Telephone number****858-485-6565****F Group Exemption  
Number ▶****G Accounting Method:** ☒ Cash ☐ Accrual Other (specify) ▶**I Website:** ▶ **WWW.CALNARPM.ORG****J Tax-exempt status** (check only one) — ☐ 501(c)(3) ☒ 501(c) ( **6** ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**H Check** ▶ ☒ if the organization is  
**not** required to attach Schedule B  
(Form 990, 990-EZ, or 990-PF).**K Form of organization:** ☒ Corporation ☐ Trust ☐ Association ☐ Other**L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II,  
column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ** ▶ **\$ 62,322.****Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I)Check if the organization used Schedule O to respond to any question in this Part I ☒

<b>Revenue</b>	<b>1</b>	Contributions, gifts, grants, and similar amounts received	<b>1</b>	<b>919.</b>
	<b>2</b>	Program service revenue including government fees and contracts	<b>2</b>	<b>61,403.</b>
	<b>3</b>	Membership dues and assessments	<b>3</b>	
	<b>4</b>	Investment income	<b>4</b>	
	<b>5a</b>	Gross amount from sale of assets other than inventory	<b>5a</b>	
	<b>5b</b>	Less: cost or other basis and sales expenses	<b>5b</b>	
	<b>5c</b>	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	<b>5c</b>	
	<b>6</b>	Gaming and fundraising events		
	<b>a</b>	Gross income from gaming (attach Schedule G if greater than \$15,000)	<b>6a</b>	
	<b>b</b>	Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	<b>6b</b>	
<b>c</b>	Less: direct expenses from gaming and fundraising events	<b>6c</b>		
<b>d</b>	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	<b>6d</b>		
<b>7a</b>	Gross sales of inventory, less returns and allowances	<b>7a</b>		
<b>b</b>	Less: cost of goods sold	<b>7b</b>		
<b>c</b>	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	<b>7c</b>		
<b>8</b>	Other revenue (describe in Schedule O)	<b>8</b>		
<b>9</b>	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	<b>9</b>	<b>62,322.</b>	
<b>Expenses</b>	<b>10</b>	Grants and similar amounts paid (list in Schedule O)	<b>10</b>	
	<b>11</b>	Benefits paid to or for members	<b>11</b>	
	<b>12</b>	Salaries, other compensation, and employee benefits	<b>12</b>	
	<b>13</b>	Professional fees and other payments to independent contractors	<b>13</b>	<b>1,071.</b>
	<b>14</b>	Occupancy, rent, utilities, and maintenance	<b>14</b>	
	<b>15</b>	Printing, publications, postage, and shipping	<b>15</b>	<b>510.</b>
	<b>16</b>	Other expenses (describe in Schedule O) <b>SEE SCHEDULE O</b>	<b>16</b>	<b>83,098.</b>
	<b>17</b>	<b>Total expenses.</b> Add lines 10 through 16	<b>17</b>	<b>84,679.</b>
<b>Net Assets</b>	<b>18</b>	Excess or (deficit) for the year (Subtract line 17 from line 9)	<b>18</b>	<b>-22,357.</b>
	<b>19</b>	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	<b>19</b>	<b>65,101.</b>
	<b>20</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>20</b>	<b>0.</b>
	<b>21</b>	Net assets or fund balances at end of year. Combine lines 18 through 20	<b>21</b>	<b>42,744.</b>

LHA For Paperwork Reduction Act Notice, see the separate instructions.

Form **990-EZ** (2017)



32

11

2017.03000 CALIFORNIA STATE CHAPTER OF CALNARP1

**CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGERS**

Form 990-EZ (2017)

20-1862735

Page 3

**Part V Other Information** (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Sch. O to respond to any question in this Part V ☒ **X**

		Yes	No
<b>33</b> Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O .....	<b>33</b>		<b>X</b>
<b>34</b> Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions) .....	<b>34</b>		<b>X</b>
<b>35a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)? .....	<b>35a</b>		<b>X</b>
<b>b</b> If "Yes" to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O .....	<b>35b</b>	N/A	
<b>c</b> Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III .....	<b>35c</b>		<b>X</b>
<b>36</b> Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N .....	<b>36</b>		<b>X</b>
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions ..... <b>37a</b> 0.			
<b>b</b> Did the organization file Form 1120-POL for this year? .....	<b>37b</b>		<b>X</b>
<b>38a</b> Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return? .....	<b>38a</b>		<b>X</b>
<b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved ..... <b>38b</b> N/A			
<b>39</b> Section 501(c)(7) organizations. Enter:			
<b>a</b> Initiation fees and capital contributions included on line 9 .....	<b>39a</b>	N/A	
<b>b</b> Gross receipts, included on line 9, for public use of club facilities .....	<b>39b</b>	N/A	
<b>40a</b> Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 <b>N/A</b> ; section 4912 <b>N/A</b> ; section 4955 <b>N/A</b>			
<b>b</b> Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I .....	<b>40b</b>	N/A	
<b>c</b> Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ..... <b>N/A</b>			
<b>d</b> Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization ..... <b>N/A</b>			
<b>e</b> All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T .....	<b>40e</b>		<b>X</b>
<b>41</b> List the states with which a copy of this return is filed <b>CA</b>			
<b>42a</b> The organization's books are in care of <b>BOB DAVIE</b> Telephone no. <b>858-485-6565</b> Located at <b>16516 BERNARDO CENTER DRIVE SUITE 330, SAN DIEGO,</b> ZIP + 4 <b>92128</b>			
<b>b</b> At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? .....	<b>42b</b>		<b>X</b>
If "Yes," enter the name of the foreign country: ..... See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
<b>c</b> At any time during the calendar year, did the organization maintain an office outside the United States? .....	<b>42c</b>		<b>X</b>
If "Yes," enter the name of the foreign country: .....			
<b>43</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here ..... <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year ..... <b>43</b> N/A			
<b>44a</b> Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ .....	<b>44a</b>		<b>X</b>
<b>b</b> Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ .....	<b>44b</b>		<b>X</b>
<b>c</b> Did the organization receive any payments for indoor tanning services during the year? .....	<b>44c</b>		<b>X</b>
<b>d</b> If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O .....	<b>44d</b>		
<b>45a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....	<b>45a</b>		<b>X</b>
<b>b</b> Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions) .....	<b>45b</b>		

Form 990-EZ (2017)

46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office?

Yes No

If "Yes," complete Schedule C, Part I

46 X

**Part VI Section 501(c)(3) organizations only**

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

☐

47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Sch. C, Part II

Yes No

47

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E

48

49a Did the organization make any transfers to an exempt non-charitable related organization?

49a

b If "Yes," was the related organization a section 527 organization?

49b

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
N/A				

f Total number of other employees paid over \$100,000

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None." N/A

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000

52 Did the organization complete Schedule A? Note: All section 501(c)(3) organizations must attach a completed Schedule A

Yes No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer

Date

BOB DAVIE, TREASURER

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

SHELLY M. QUARISA

03/13/18

P00730188

Firm's name ▶ OLIVA, GODDARD &amp; WRIGHT, CPAS

Firm's EIN ▶ 33-0578542

Firm's address ▶ 9333 GENESEE AVE, STE 110  
SAN DIEGO, CA 92121

Phone no. (858) 554-0800

May the IRS discuss this return with the preparer shown above? See instructions

X Yes No

Form 990-EZ (2017)

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2017**

Open to Public  
Inspection

Name of the organization

CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGERS

Employer identification number  
20-1862735

**FORM 990-EZ, PART I, LINE 16, OTHER EXPENSES:**

**DESCRIPTION OF OTHER EXPENSES:**

**AMOUNT:**

ADVERTISING AND PROMOTION	584.
CONFERENCES, CONVENTIONS, AND MEETINGS	79,733.
MERCHANT ACCOUNT FEES	2,153.
PO BOX	178.
STATE TAX	10.
REGISTRATION, LICENSES, AND PERMITS	440.
TOTAL TO FORM 990-EZ, LINE 16	83,098.

FORM 990-EZ, PART III, PRIMARY EXEMPT PURPOSE - THE NARPM CALIFORNIA CHAPTER WAS FORMED IN 2002 TO BRING COLLABORATION AND SYNERGY TO THE VARIOUS LOCAL CHAPTERS OF NARPM IN CALIFORNIA. WHILE CHAPTERS FROM SAN DIEGO TO MARIN/SONOMA WERE DOING AN EFFECTIVE JOB OF PROVIDING NETWORKING, EDUCATION, AND PROFESSIONALISM TO OVER 300 PROFESSIONAL RESIDENTIAL PROPERTY MANAGERS, THERE WAS NO FORMAL GROUP TO OVERSEE INFORMATION AND EVENTS THAT WERE OF CONCERN TO ALL PROPERTY MANAGERS DOING BUSINESS IN CALIFORNIA. REPRESENTATIVES FROM EACH CALIFORNIA NARPM CHAPTER JOINED TOGETHER IN 2002 TO FORM THE CALIFORNIA STATEWIDE CHAPTER."

**FORM 990-EZ, PART III, LINE 28, PROGRAM SERVICE ACCOMPLISHMENTS:**

WORKSHOPS AND PANEL PRESENTATIONS AT THE CALNARPM

CALIFORNIA CONFERENCE. THE CALNARPM CONFERENCE BOASTS

ATTENDANCE OF APPROXIMATELY 150 OF THE MOST PROFESSIONAL,

INFLUENTIAL, AND QUALIFIED RESIDENTIAL PROPERTY MANAGERS THROUGHOUT THE

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2017)

732211 09-07-17

Name of the organization	CALIFORNIA STATE CHAPTER OF NATIONAL ASSN OF RESIDENTIAL PROPERTY MANAGERS	Employer identification number 20-1862735
--------------------------	---	--

STATE OF CALIFORNIA.

FORM 990-EZ, PART V, INFORMATION REGARDING PERSONAL BENEFIT CONTRACTS:

THE ORGANIZATION DID NOT, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY,  
OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT.

THE ORGANIZATION, DID NOT, DURING THE YEAR, PAY ANY PREMIUMS, DIRECTLY,  
OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT.

2017

# California Exempt Organization Annual Information Return

199

Calendar Year 2017 or fiscal year beginning (mm/dd/yyyy)		, and ending (mm/dd/yyyy)	
Corporation/Organization name <b>CALIFORNIA STATE CHAPTER OF NATIONAL ASSN OF RESIDENTIAL PROPERTY MANAGERS</b>		California corporation number <b>2706445</b>	
Additional information. See instructions.		FEIN <b>20-1862735</b>	
Street address (suite or room) <b>16516 BERNARDO CENTER DR, SUITE 330</b>		PMB no.	
City <b>SAN DIEGO</b>	State <b>CA</b>	ZIP code <b>92128</b>	
Foreign country name	Foreign province/state/county		Foreign postal code

<b>A</b> First Return <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>B</b> Amended Return <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>C</b> IRC Section 4947(a)(1) trust <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>D</b> Final Information Return? <input type="checkbox"/> Dissolved <input type="checkbox"/> Surrendered (Withdrawn) <input type="checkbox"/> Merged/Reorganized Enter date: (mm/dd/yyyy) <input type="checkbox"/> <b>E</b> Check accounting method: (1) <input checked="" type="checkbox"/> Cash (2) <input type="checkbox"/> Accrual (3) <input type="checkbox"/> Other <b>F</b> Federal return filed? (1) <input type="checkbox"/> 990T (2) <input type="checkbox"/> 990PF (3) <input type="checkbox"/> Sch H (990) (4) <input checked="" type="checkbox"/> Other 990 series <b>G</b> Is this a group filing? See instructions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H</b> Is this organization in a group exemption <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," what is the parent's name? <b>I</b> Did the organization have any changes to its guidelines not reported to the FTB? See instructions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>J</b> If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. <input type="checkbox"/> Yes <input type="checkbox"/> No <b>K</b> Is the organization exempt under R&TC Section 23701g? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," enter the gross receipts from nonmember sources \$ _____ <b>L</b> If organization is exempt under R&TC Section 23701d and meets the filing fee exception, check box. No filing fee is required. <input type="checkbox"/> <b>M</b> Is the organization a Limited Liability Company? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>N</b> Did the organization file Form 100 or Form 109 to report taxable income? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>O</b> Is the organization under audit by the IRS or has the IRS audited in a prior year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>P</b> Is federal Form 1023/1024 pending? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Date filed with IRS _____
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**Part I Complete Part I unless not required to file this form. See General Information B and C.**

<b>Receipts and Revenues</b>	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8	1	61,403.00
	2	Gross dues and assessments from members and affiliates	2	00
	3	Gross contributions, gifts, grants, and similar amounts received	3	919.00
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than \$50,000, see General Information B.	4	62,322.00
	5	Cost of goods sold	5	00
	6	Cost or other basis, and sales expenses of assets sold	6	00
	7	Total costs. Add line 5 and line 6	7	00
	8	Total gross income. Subtract line 7 from line 4	8	62,322.00
<b>Expenses</b>	9	Total expenses and disbursements. From Side 2, Part II, line 18	9	84,679.00
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8	10	-22,357.00
<b>Filing Fee</b>	11	Total payments	11	00
	12	Use tax. See General Information K	12	00
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11	13	00
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12	14	00
	15	Filing fee \$10 or \$25. See General Information F	15	10.00
	16	Penalties and Interest. See General Information J	16	00
	17	<b>Balance due.</b> Add line 12, line 15, and line 16. Then subtract line 11 from the result	17	10.00
<b>Sign Here</b>	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
	Signature of officer	Title <b>TREASURER</b>	Date	Telephone <b>858-485-6565</b>
<b>Paid Preparer's Use Only</b>	Preparer's signature	Date <b>03/13/18</b>	Check if self-employed <input type="checkbox"/>	PTIN <b>P00730188</b>
	Firm's name (or yours, if self-employed) and address	FEIN <b>33-0578542</b>		
				Telephone <b>(858) 554-0800</b>
	May the FTB discuss this return with the preparer shown above? See instructions <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			



CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGERS

20-1862735

**Part II** Organizations with gross receipts of more than \$50,000 and private foundations regardless of amount of gross receipts - complete Part II or furnish substitute information.

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Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions .....	•	1	00
	2	Interest .....	•	2	00
	3	Dividends .....	•	3	00
	4	Gross rents .....	•	4	00
	5	Gross royalties .....	•	5	00
	6	Gross amount received from sale of assets (See Instructions) .....	•	6	00
	7	Other income ..... <b>SEE STATEMENT 1</b> .....	•	7	61,403. 00
	8	<b>Total</b> gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1 .....		8	61,403. 00
	9	Contributions, gifts, grants, and similar amounts paid .....	•	9	00
	10	Disbursements to or for members .....	•	10	00
	11	Compensation of officers, directors, and trustees ..... <b>SEE STATEMENT 2</b> .....	•	11	0. 00
	12	Other salaries and wages .....	•	12	00
	13	Interest .....	•	13	00
	14	Taxes .....	•	14	00
	15	Rents .....	•	15	00
	16	Depreciation and depletion (See instructions) .....	•	16	00
	17	Other Expenses and Disbursements ..... <b>SEE STATEMENT 3</b> .....	•	17	84,679. 00
	18	<b>Total</b> expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9 .....		18	84,679. 00

Schedule L Balance Sheet		Beginning of taxable year		End of taxable year	
Assets	(a)	(b)	(c)	(d)	
1 Cash .....		65,101.		• 42,744.	
2 Net accounts receivable .....				•	
3 Net notes receivable .....				•	
4 Inventories .....				•	
5 Federal and state government obligations .....				•	
6 Investments in other bonds .....				•	
7 Investments in stock .....				•	
8 Mortgage loans .....				•	
9 Other investments .....				•	
10 a Depreciable assets .....					
b Less accumulated depreciation .....	( )		( )		
11 Land .....				•	
12 Other assets .....				•	
13 Total assets .....		65,101.		42,744.	
Liabilities and net worth					
14 Accounts payable .....				•	
15 Contributions, gifts, or grants payable .....				•	
16 Bonds and notes payable .....				•	
17 Mortgages payable .....				•	
18 Other liabilities .....					
19 Capital stock or principal fund .....				•	
20 Paid-in or capital surplus. Attach reconciliation .....				•	
21 Retained earnings or income fund .....		65,101.		• 42,744.	
22 Total liabilities and net worth .....		65,101.		42,744.	

**Schedule M-1 Reconciliation of income per books with income per return**

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000.

1 Net income per books .....	•	7 Income recorded on books this year not included in this return .....	•
2 Federal income tax .....	•	8 Deductions in this return not charged against book income this year .....	•
3 Excess of capital losses over capital gains .....	•	9 Total. Add line 7 and line 8 .....	
4 Income not recorded on books this year .....	•	10 Net income per return. Subtract line 9 from line 6 .....	
5 Expenses recorded on books this year not deducted in this return .....	•		
6 Total. Add line 1 through line 5 .....			

CA 199	OTHER INCOME	STATEMENT	1
DESCRIPTION		AMOUNT	
PROGRAM SERVICE REVENUE		61,403.	
TOTAL TO FORM 199, PART II, LINE 7		61,403.	

CA 199	COMPENSATION OF OFFICERS, DIRECTORS AND TRUSTEES	STATEMENT	2
NAME AND ADDRESS	TITLE AND AVERAGE HRS WORKED/WK	COMPENSATION	
MICHAEL BRADDON 1210 28TH ST SAN DIEGO, CA 92102	PRESIDENT 6.00	0.	
CECELIA M. ROSAS 1365 CADENCE WAY SANTA ROSA, CA 95401	IMMEDIATE PAST PRES 2.00	0.	
MATT PRANDI BORRIES 1321 THIRD STREET SAN RAFAEL, CA 94901	SECRETARY 4.00	0.	
BOB DAVIE 16516 BERNARDO CENTER DR SUITE 330 SAN DIEGO, CA 92128	TREASURER 4.00	0.	
TOTAL TO FORM 199, PART II, LINE 11		0.	

CA 199	OTHER EXPENSES	STATEMENT	3
DESCRIPTION		AMOUNT	
ADVERTISING AND PROMOTION		584.	
CONFERENCES, CONVENTIONS, AND MEETINGS		79,733.	
MERCHANT ACCOUNT FEES		2,153.	
PO BOX		178.	
STATE TAX		10.	
REGISTRATION, LICENSES, AND PERMITS		440.	
PROFESSIONAL FEES AND OTHER PAYMENTS TO INDEPENDENT CONTRACTORS		1,071.	
PRINTING, PUBLICATIONS, POSTAGE AND SHIPPING		510.	
TOTAL TO FORM 199, PART II, LINE 17		84,679.	

**Voucher at bottom of page.**

**DO NOT MAIL A PAPER COPY OF THE CORPORATE OR EXEMPT ORGANIZATION TAX RETURN  
WITH THE PAYMENT VOUCHER.**

**If the amount of payment is zero, do not mail this voucher.**

**WHERE TO FILE:**

Using black or blue ink, make check or money order payable to the "Franchise Tax Board." Write the corporation number or FEIN and "2017 FTB 3586" on the check or money order. Detach voucher below. Enclose, but **do not** staple, payment with voucher and mail to:

**FRANCHISE TAX BOARD  
PO BOX 942857  
SACRAMENTO CA 94257-0531**

Make all checks or money orders payable in U.S. dollars and drawn against a U.S. financial institution.

**WHEN TO FILE:**

**Corporations - File and Pay by the 15th day of the 4th month following the close of the taxable year.**

**S corporations - File and Pay by the 15th day of the 3rd month following the close of the taxable year.**

**Exempt organizations - File and Pay by the 15th day of the 5th month following the close of the taxable year.**

When the due date falls on a weekend or holiday, the deadline to file and pay without penalty is extended to the next business day.

Due to the federal Emancipation Day holiday on April 16, 2018, tax returns filed and payments mailed or submitted on April 17, 2018, will be considered timely.

**ONLINE SERVICES:**

Corporations can make payments online using Web Pay for Businesses. Corporations can make an immediate payment or schedule payments up to a year in advance. Go to [ftb.ca.gov/pay](http://ftb.ca.gov/pay) for more information.

739035 11-29-17

--- DETACH HERE --- IF NO PAYMENT IS DUE, DO NOT MAIL THIS VOUCHER --- DETACH HERE ---

**CAUTION:** You may be required to pay electronically, see instructions.

TAXABLE YEAR

**2017**

**Payment Voucher for Corporations and Exempt  
Organizations e-filed Returns**

CALIFORNIA FORM

**3586 (e-file)**

0000000 CALI 20-1862735 2706445 17 FORM 3

TYB 01-01-2017 TYE 12-31-2017

CALIFORNIA STATE CHAPTER OF NATIONAL ASSN OF RESIDENTIAL PROPERTY MANA

16516 BERNARDO CENTER DR STE 330  
SAN DIEGO CA 92128

(858) 485-6565

Amount of Payment 10.

Date Accepted \_\_\_\_\_

DO NOT MAIL THIS FORM TO THE FTB

TAXABLE YEAR

**2017****California e-file Return Authorization for  
Exempt Organizations**

FORM

**8453-EO**

Exempt Organization name

Identifying number

**CALIFORNIA STATE CHAPTER OF NATIONAL  
ASSN OF RESIDENTIAL PROPERTY MANAGERS****20-1862735****Part I Electronic Return Information** (whole dollars only)

<b>1</b>	Total gross receipts (Form 199, line 4)	<b>1</b>	<b>62,322.00</b>
<b>2</b>	Total gross income (Form 199, line 8)	<b>2</b>	<b>62,322.00</b>
<b>3</b>	Total expenses and disbursements (Form 199, line 9)	<b>3</b>	<b>84,679.00</b>

**Part II Settle Your Account Electronically for Taxable Year 2017**

<b>4</b>	<input type="checkbox"/> Electronic funds withdrawal	<b>4a</b> Amount	<b>4b</b> Withdrawal date (mm/dd/yyyy)
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**Part III Banking Information** (Have you verified the exempt organization's banking information?)

<b>5</b>	Routing number	<b>7</b>	Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
<b>6</b>	Account number		

**Part IV Declaration of Officer**

I authorize the exempt organization's account to be settled as designated in Part II. If I check Part II, Box 4, I authorize an electronic funds withdrawal for the amount listed on line 4a.

Under penalties of perjury, I declare that I am an officer of the above exempt organization and that the information I provided to my electronic return originator (ERO), transmitter, or intermediate service provider and the amounts in Part I above agree with the amounts on the corresponding lines of the exempt organization's 2017 California electronic return. To the best of my knowledge and belief, the exempt organization's return is true, correct, and complete. If the exempt organization is filing a balance due return, I understand that if the Franchise Tax Board (FTB) does not receive full and timely payment of the exempt organization's fee liability, the exempt organization will remain liable for the fee liability and all applicable interest and penalties. I authorize the exempt organization return and accompanying schedules and statements be transmitted to the FTB by the ERO, transmitter, or intermediate service provider. **If the processing of the exempt organization's return or refund is delayed, I authorize the FTB to disclose to the ERO or intermediate service provider the reason(s) for the delay.**

**Sign  
Here**

Signature of officer

Date

**TREASURER**

Title

**Part V Declaration of Electronic Return Originator (ERO) and Paid Preparer.**

I declare that I have reviewed the above exempt organization's return and that the entries on form FTB 8453-EO are complete and correct to the best of my knowledge. (If I am only an intermediate service provider, I understand that I am not responsible for reviewing the exempt organization's return. I declare, however, that form FTB 8453-EO accurately reflects the data on the return.) I have obtained the organization officer's signature on form FTB 8453-EO before transmitting this return to the FTB; I have provided the organization officer with a copy of all forms and information that I will file with the FTB, and I have followed all other requirements described in FTB Pub. 1345, 2017 e-file Handbook for Authorized e-file Providers. I will keep form FTB 8453-EO on file for **four** years from the due date of the return or **four** years from the date the exempt organization return is filed, whichever is later, and I will make a copy available to the FTB upon request. If I am also the paid preparer, under penalties of perjury, I declare that I have examined the above exempt organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

<b>ERO</b>	ERO's signature	Date	Check if also paid preparer <input checked="" type="checkbox"/>	Check if self-employed <input type="checkbox"/>	ERO's PTIN
<b>Must Sign</b>	Firm's name (or yours if self-employed) and address				FEIN
	<b>OLIVA, GODDARD &amp; WRIGHT, CPAS</b>				<b>33-0578542</b>
	<b>9333 GENESEE AVE, STE 110</b>				ZIP code
	<b>SAN DIEGO, CA</b>				<b>92121</b>

Under penalties of perjury, I declare that I have examined the above organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

<b>Paid Preparer</b>	Paid preparer's signature	Date	Check if self-employed <input type="checkbox"/>	Paid preparer's PTIN
<b>Must Sign</b>	Firm's name (or yours if self-employed) and address			FEIN
				ZIP code

For Privacy Notice, get FTB 1131 ENG/SP.

FTB 8453-EO 2017