

October 9, 2017

NARPM CONFERENCE CALL MEETING MINUTES:

Conference Dial-In Number: (641) 715-3580; Participant Access Code: 914866#

In Attendance:

Michael Braddon, Cheryl Chase-Berkson, Bob Davie, Julie Kern, Pam Neillo, Lisa Fore, Steve Welty, Bob Bixel, Amanda Gresiak

Start: 8:11 AM

Agenda:

- 1) Board Member Elections October 2017 for 2018 Board
 - A) Lisa Fore accepted position as 2018 San Diego Chapter President
 1. One of first duties for 2018 is to line up speakers for the monthly meetings.
 2. Michael Braddon had offered to be Treasurer for 2018. There is now a 2nd candidate for Treasurer, Carolyn Crane. Michael will meet with her to confirm qualifications.
 3. Ballots will be sent out to members for 2018 Board and ballots to be returned by October 25, 2017. Ballots to be ratified by 2017 Board by end of October, 2017.
 4. Michael Braddon will introduce new 2018 Board at following Chapter meeting.
 5. Michael Braddon asked if there was certain software to send out ballots to members. "Survey Monkey" was suggested.
- 2) Personnel Procedures Advanced Course – Nov. 15, 2017- 9 AM to 4 PM – Melissa Prandi, instructor:
 - A) Michael Braddon will encourage attendance to this class at the local Chapter meeting to members at October meeting, October 11, 2017.
 - B) Require 5 attendees to "break even", but prefer and will encourage more attendees.
 - C) Reimbursements to speaker was discussed. Hotel and transportation is only what is paid for by our local Chapter to speaker. Should Honorarium be expected, speaker is to contact NARPM National.
- 3) Fall Speakers: October (KTS – Kimball, Tirey, and St. John – law firm); November (Melissa Prandi – discuss why she is involved in NARPM and value of designations); December (Christmas Luncheon).
- 4) "Marketing The Chapter" – Steve Welty:
 - A) Steve Welty asked what is proper protocol for getting the marketing plan going; cost to be \$200 per month. Steve Welty, Michael Braddon, Bob Davie, and Lisa Fore to meet to clarify and go over marketing proposal. Meeting to be in late October.
 - B) Michael Braddon offered to be the one to keep sending out EVITEs for the meetings.
 - C) Michael Braddon nominated Steve Welty to be "Marketing Chair. All approved.

- 5) Holiday Lunch/Buffer: December 20, 2017 – Bali Hai – Lunch Buffet – Lisa Fore to confirm once “head-count” is determined. Michael Braddon to get the number to Lisa Fore.
- 6) “Get To Know Our Affiliates Better” – Julie Kern, Affiliates Chair
 - A) Michael Braddon to be “Event Chair” and will coordinate with Affiliate Chair, Julie Kern
 - B) Great review and well attended event on September 27, 2017. Great “thank you’s” to Julie Kern for organizing and planning the charity event!
 - C) Julie Kern requested suggestions for future charity events.
 - D) Michael Braddon offered to be Julie Kern’s assistant for future events as Event Chairman
 - E) Julie Kern suggested a specific future venue and for the committee to meet there to “check it out”. Meeting date to be in late October.
 - F) All agreed for Michael Braddon to be “Event Chair”.
- 7) Offer Of Marketing Content & Role With New Affiliates & KTS Role With Our Chapter
- 8) Other Business: None
- 9) Adjourned: 8:46 AM**
- 10) Respectfully Submitted by Cheryl Chase-Berkson, Secretary, October 9, 2017

**San Diego Chapter of the National Association of Residential
Property Managers**

**2018 Fiscal Year Budget Proposal
12/1/2017**

Ordinary Income

| | |
|--------------------------------|--------------------|
| Member Fees | \$10,000.00 |
| Vendor (Affiliate) Annual Dues | \$4,200.00 |
| Chapter Grant | \$500.00 |
| Other Income | \$1,000.00 |
| Total Income | \$15,700.00 |

Business Expenses

Meeting Expenses

| | |
|------------------|------------|
| Luncheon Expense | \$8,000.00 |
| Speaker Fees | \$2,500.00 |
| Supplies | \$250.00 |

Operations

| | |
|-----------------------------------|------------|
| Casual Labor | \$250.00 |
| Printing and Copying | \$250.00 |
| Executive Board Meetings | \$450.00 |
| Cal-NARPM Contribution | \$500.00 |
| National Association Contribution | \$1,000.00 |
| Software | \$1,000.00 |
| Corporate Filing Fee | \$25.00 |
| Computer / IT | \$100.00 |
| Website | \$1,000.00 |

| | |
|-----------------------|--------------------|
| Total Expenses | \$14,325.00 |
|-----------------------|--------------------|

| | |
|----------------------------------|-------------------|
| Net Ordinary Income Total | \$1,375.00 |
|----------------------------------|-------------------|

Michael Braddon

From: Michael Braddon <michael@orionmrinc.com>
Sent: Wednesday, June 14, 2017 9:55 AM
To: Lisa Fore; Bob Davie; Amanda Gresiak; Becky Granger; Cheryl Berkson; Dathan Kern; Pam Niello; Robert Bixel; Scott Colbert; Steve Welty; Mr Rekey San Diego; michael@sdnarpm.org
Cc: 'Michael Braddon'
Subject: SD-NARPM Board Meeting June 19th 2017 @ 8 AM PHONE ONLY
Importance: High

Fellow SD-NARPM Board Members,

We were scheduled to have our third San Diego Chapter Board Meeting **this coming ... Monday, June 19th, at 8 AM.**

NOTE: *Next Board Meeting ... Monday, August 21st, 2017 @ 8 AM.*

We are dark in July 2017 !!!

Conference Dial-in Number: (641) 715-3580

Participant Access Code: 914866#

Agenda:

- 1) Lisa Fore President Elect for 2018 and **Board Member Elections for 2018.**
- 2) **Continued Goals for 2017 –**
National and SD Chapter (continuing the success); Newsletter & Chapter Web Site; Affiliates !!!
- 3) **Personnel Procedures Advanced Course** | Nov 15, 2017 | 9 am - 4 pm | Melissa Prandi, MPM® RMP®
- 4) **FALL Speakers** ; Round Table(s) for 2017
- 5) **“Marketing the Chapter” – Steve Welty**
- 6) **SDAR Expo 2018** – discount and support of SDAR
- 7) **Holiday Dinner – December 20th, 2017** – Thank you Lisa Fore !!!
- 8) **“Get to know our Affiliates better” – Julie, Affiliates Chair**
- 9) **Offer of Marketing Content & Role w/ New Affiliate & KTS Role with our Chapter.**
- 10) Other business

NOTE: Looking for Volunteers to be Treasurer and Secretary next year ... please let me know if you're interested !!!

Thank you for volunteering !!!

Michael
San Diego NARPM Chapter President 2016-17

Michael Braddon

Bob Davie

From: Steve Welty <steve@goodlifemgmt.com>
Sent: Friday, March 9, 2018 4:02 PM
To: Bob Davie
Cc: Carolyn Crane
Subject: Re: SD-NARPM Chapter Excellence/Chapter Compliance

Bob,

Thank you for your email. I did not file it yet. Just did though:) Here you go. Thanks much!!

Your Form 990-N(e-Postcard) has been submitted to the IRS

- **Organization Name:** SAN DIEGO CHAPTER OF THE NARPM INC
- **EIN:** 800157263
- **Tax Year:** 2017
- **Tax Year Start Date:** 01-01-2017
- **Tax Year End Date:** 12-31-2017
- **Submission ID:** 10065520180681801960
- **Filing Status Date:** 03-09-2018
- **Filing Status:** Pending

2017 990N Tax Filing

Note: Print a copy of this filing for your records. Once you leave this page, you will not be able to do so.

[MANAGE FORM 990-N SUBMISSIONS](#)

On Thu, Mar 8, 2018 at 11:20 AM, Bob Davie <bob@sandiegorpm.com> wrote:

Hi guys:

I'm preparing to send NARPM national all of our supporting documents for our annual "Chapter Compliance and Chapter Excellence, and need both of your help with 2 pieces of info:

1. Steve: Can you send me the copy of the postcard info for the 2017 tax filing? If you don't have that, but have a copy of the document that they send you to prove that we did indeed file taxes, that would suffice.....they just want to make sure that each chapter has completed their fiscal responsibility. I have attached a copy of what you provided me last year for your reference.
2. Carolyn: can you provide me with a rough 2017 and 2018 budget? It does NOT need to be detailed, just a rough idea of income and expenses. I have attached what we submitted last year for your reference.



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

January 18, 2017

NARPM® ANTITRUST STATEMENT:

It is the policy of the NARPM® to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM®'s membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs), individual competitors or specific business transactions, or controlling or allocating markets. NARPM® shall not restrict members' ability to solicit competitors' clients. NARPM® shall not restrict members' ability to advertise for business, provided the advertising is not false, deceptive or otherwise illegal.

- 1. Welcome guest, members and affiliates.**
- 2. Introduce New PM(s) (30 seconds each)**
 - Please stand up, tell us your name, your company and how you found us.
- 3. Introduce New Affiliates (30 seconds each)**
 - Please stand up, tell us your name, your company and who brought you.
- 4. Welcome Guests (30 Seconds each)**
 - Please stand up, tell us your name, your company and who brought you.
- 5. Read Code of NARPM Ethics:**

STANDARDS OF PROFESSIONALISM

1-1 The Property Manager shall endeavor to eliminate in the community, 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 assist the governmental agency charged with regulating the practices of Property Managers.

1-3 The Property Manager shall comply with all local and state ordinances regarding real estate law, licensing, insurance, and banking.

1-4 The Property Manager shall not knowingly, during or following their professional relationships with their clients or their tenants, reveal confidential information of the clients or tenants. The Property Manager must take all precautions in keeping information in regard to owners and tenants reasonably secured to prevent identity theft.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** San Rarefied Air Environmental
- 8. Guest Speaker (60 – 90 Minutes):** Cheryl Chase-Berkson, CALNARPM President



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

February 15, 2017

NARPM® ANTITRUST STATEMENT:

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1-5 The Property Manager shall use reasonable efforts to be sure that information on their website is current. If it becomes apparent that information on the website is not current, then the Property Manager shall promptly take corrective action.

1-6 The websites of the Property Manager shall not contain any deceptive metatags or other devices/methods to direct, drive, or divert Internet traffic or to otherwise mislead customers. The websites shall also not manipulate listing content in any way that produces a deceptive or misleading result.

1-7 Property Managers shall disclose all details on the availability of rental properties to prospective parties on a regular and timely basis.

1-8 Property Managers shall avoid exaggeration, misrepresentation, misinformation, or concealment of pertinent facts relating to the advertising, leasing, and management of the property.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** David Kacsur – Budget Blinds
- 8. Guest Speaker (60 – 90 Minutes):** Mary E. Work – BRE Audit Esq.



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

March 15, 2017

NARPM® ANTITRUST STATEMENT:

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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

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.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** Pat Guiant - Puroclean
- 8. Guest Speaker (60 – 90 Minutes):** Seacoast Commerce Bank

Allison DiSarro - Trust Accounts and answering your questions.



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

April 19, 2017

NARPM® ANTITRUST STATEMENT:

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Article 3: RESPONSIBILITY TO CLIENT

The Property Manager has a fiduciary responsibility to the Client and shall at all times act in the best interests of the Client.

STANDARDS OF PROFESSIONALISM

3-1 The Property Manager shall use written management agreements, and written extensions, if required, outlining all responsibilities and fees. The Client will be provided a copy of signed agreements and extensions and the Property Manager will retain a copy.

3-2 The Property Managers shall communicate regularly with the Client and provide written reports of receipts and disbursements on a regular and agreed upon basis. In the event of any dispute, the Property Manager shall provide a written accounting as soon as practical.

3-3 Tenant applications shall be reviewed and verified in order to determine the Applicant's ability to pay and to determine the likelihood that the Applicant will comply with all provisions of the rental agreement.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** CH Heidi Bell – Clean Earth Restorations
- 8. Guest Speaker (60 – 90 Minutes):** Round Table – Challenging Q&A



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

May 17, 2017

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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 owners about the rental market value of their property in an attempt to secure a rental listing.

3-6 Property Managers shall disclose to their Client all pertinent facts relating to the transaction.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** Same Day Restoration
- 8. Guest Speaker (60 – 90 Minutes):**

Scott P. Brady of the Brady Consulting Group- shifting SMIPO market.



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

June 21, 2017

NARPM® ANTITRUST STATEMENT:

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Article 4: OBLIGATIONS TO TENANTS

The Property Manager shall treat all Tenants honestly and professionally when applying for, living in, and vacating a managed residence. The Property Manager shall hold a high regard for the safety and health of those lawfully at a managed property.

STANDARDS OF PROFESSIONALISM

4-1 The Property Manager shall offer all Prospective Renters 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 at the time of moving in.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** Debbie Pierce – Farmers Insurance
- 8. Guest Speaker (60 – 90 Minutes):**

Local Jim Roth - Attorney at Law - NEW Laws affecting us this year



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

August 16, 2017

NARPM® ANTITRUST STATEMENT:

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- 5. Read Code of NARPM Ethics:**

4-4 The Property Manager shall respond promptly to requests for repairs.

4-5 Within the time prescribed by law, a written deposit refund determination shall be provided to the Tenant after they have vacated the property. No undue delay in refunding or accounting for the security deposit shall take place.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** Coastal Tree Care
- 8. Guest Speaker (60 – 90 Minutes):**

John Phil Ihde & Summer Goralik - BRE Audit Consultants



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

September 20, 2017

NARPM® ANTITRUST STATEMENT:

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Article 5: CARE OF MANAGED PROPERTIES

The Property Manager 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 Property Manager shall terminate management of property if client does not comply with habitability requirements.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** Pete Williams – Farmers Insurance
- 8. Guest Speaker (60 – 90 Minutes):** Kyle Nelson - TransUnion



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

October 11, 2017

NARPM® ANTITRUST STATEMENT:

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Article 6: PROTECTION OF FUNDS

The Property Manager shall hold all funds received on behalf of others in compliance with state law with full disclosure to the Client and these funds will be kept separate from the firm's or personal funds of the Property Manager.

STANDARDS OF PROFESSIONALISM

6-1 Property Managers shall prepare and furnish to the client accurate and timely financial reports relating to their rental unit in accordance with the terms of the management agreement

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** Mr. Rekey Locksmith
- 8. Guest Speaker (60 – 90 Minutes):**

Kimball, Tirey & St. John LLP - Creditor's rights and debt collection.



National Association of Residential Property Managers

Michael Braddon
San Diego Chapter President

MEETING AGENDA

November 15, 2017

NARPM® ANTITRUST STATEMENT:

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Article 7: CHARGE TO DISCLOSE EXPERTISE

The Property Manager must provide accurate information within his area of expertise, but refrain from the unauthorized practice of any other profession that may require a separate license, such as. law, accounting, and financial planning, construction, and contracting.

7-1 Members shall undertake only those areas of expertise that they can reasonably be expected to perform with professional competence.

- 6. Questions (10 Minutes)**
- 7. Affiliate Spotlight (10-30 Minutes):** None
- 8. Guest Speaker (60 – 90 Minutes):**

President & CEO of PRANDI Property Management, Inc., CRMC®,
– Benefits of NARPM

February 20, 2017

NARPM CONFERENCE CALL MEETING MINUTES:

In Attendance:

Michael Braddon, Cheryl Chase-Berkson, Bob Davie, Steve Welty, Dathan and Julie Kern, Bob Bixel, Amanda Gresiak

Start: 8:02 AM

Agenda:

- 1) Michael reviewed and discussed the following:
 - A) Getting credit from Panera for lack of them providing lunch at last week's meeting, February 15, 2017. Steve Welty, Treasurer, acknowledged he would take care of this issue.
 - B) Leadership Training: Reviewed that Michael Braddon attended the training at last year's "first" Leadership Training, and that Lisa Fore attended the 2nd.
 1. Purpose of the training is to bring more success to the NARPM organization and further understanding of leadership roles and of NARPM's expectations.
 2. Michael also discussed one of main focuses on yesterday's RVP call was to have NARPM Educational classes provided at each local Chapter.
 3. San Diego Chapter will have Educational class taught at the November 15, 2017 meeting of Advanced Personnel Procedures, instructor to be Melissa Prandi.
 - C) Goals For 2017:
 1. Mary Work spoke at February 15, 2017 meeting regarding BRE compliance required for BRE audits. She has also offered names of two experienced people who would be willing to counsel property management company owners on a one-by-one basis as well as speaking at a future meeting.
 2. Speaker Line-Up:
 - a. March: SeaCoast Bank, Allison, will discuss explanation of what a "true" Trust Account is and of the importance of property managers being in compliance.
 - b. April: Legal Updates
 - c. May: Scott Brady: Self-Managed Investment Owners – How to Reach Them.
 - d. June: Roundtable Discussion
 - e. July: No meeting - DARK
 - f. September: MOCO speaker, Rhonda, regarding credit report changes and new criteria, such as what will be "masked" on credit reports, judgments, collections, etc.
 - D) Broker/Owner Conference: March, 2017 in Las Vegas, NV. Will be at Mirage Hotel. Michael Braddon and Jennifer Newton attending.
 - E) CALNARPM Conference: April 12 - 14, 2017 in Napa, CA. Cheryl Chase-Berkson updated status: Conference Brochure to be mailed out this week; registered attendees is 20% ahead of where registered attendees were last year at current number of weeks out; great keynote speakers; closing 3 panel member of Q & A time at last lunch session; great, hardworking Conference Committee.

- F) SDAR Realtor Expo: April 27, 2017 in San Diego, CA; \$25 discount for NARPM members who sign up will be provided by SDAR.
- G) "Thank you" to Bob Davie for taking on Chapter Excellence report. All completed except for attaching local chapter budget; will be sent to Bob Davie by Steve Welty. Bob and Cheryl completing CALNARPM Chapter Excellence as well.
- H) Other Business:
 - 1. Volunteers:
 - a. Julie Kern is seeking volunteer, co-chair, for Affiliate Chair positions. She also suggested things to improve the monthly meeting flow, such as a "greeter" at the door as people arrive and also having the Affiliates participate more, such as staying after the meetings to help clean up.
 - b. Bob Davie suggested having a "community project" once or twice a year where chapter members and affiliates can participate. This would gain "points" towards Chapter Excellence annually, and would also elevate the local chapter in its service to the community and would also have the support of SDAR. Michael said he would pursue this further with the help of Amanda, who had organized such projects previously.
 - c. Michael looking for assistance with the newsletter, such as with EventBrite and Constant Contact. He reported that approximately 80 people read the newsletter when it comes out online, and that there are 225 people on the Constant Contact list to which the newsletter is sent out.
 - 1. Steve suggested the Affiliates contribute to the newsletter with information in their industry as well as perhaps having one of them be the assistant Michael is seeking.
 - 2. Michael expressed that the most important aspect now is to have "regular maintenance" for the website, Constant Contact, and the newsletter.
 - 3. Cheryl suggested having the Affiliates or someone else, perhaps Jim Roth, the Governmental and Legislative Chair provide legal and industry updates at the meetings as well as in the newsletter. Michael will reach out to Jim to discuss this suggestion.

2. New Board Positions:

- a. Treasurer: Michael said he would be glad to be Treasurer when Steve leaves the position should there be no other at the time.
- 4. Steve Welty discussed the following:
 - a. Steve asked for Board approval to have Quick Books "online" at \$7.00 per month cost to NARPM local chapter. All Board members approved.
 - b. Steve also shared he had talked with a lady who helps other chapters with improving their automation, communications, and

implementations of all. Cost is \$2,000 to \$3,000. Steve will send her proposal to all Board members for their review.

- I) Meeting Adjourned at 9:11 AM, with the following Board members staying on call to discuss an Affiliate member who decided not to re-new membership. Michael Braddon, Bob Davie, Cheryl Chase-Berkson, and Amanda Gresiak. The extended call with the 4 Board members adjourned at 9:51 AM.
- J) Respectfully Submitted by Cheryl Chase-Berkson, Secretary, February 20, 2017.

April 24 , 2017

NARPM CONFERENCE CALL MEETING MINUTES:

In Attendance:

Michael Braddon, Cheryl Chase-Berkson, Bob Davie, Julie Kern, Amanda Gresiak, Pam Neillo, and Lisa Fore

Start: 8:06 AM

Agenda:

- 1) Michael reviewed and discussed the following:
 - A) **“Happy Hour” Mixer:**
 1. Julie Kern: Julie to chair such an event and asked for a “co-chair” for such planning as well as “co-chair” for being in charge of the Affiliates. The purpose of such a mixer would be to get to know the vendors better.
 - a. Julie suggested having such a gathering on a regular basis, changing the venue from north county to south county in order to make it convenient for all members.
 - b. Julie to approach current vendors to consider “hosting” such an event.
 - c. Pam offered suggestions as to how the San Diego County Apartment Association does their regular mixers.
 - B) **Julie also suggested** that at our monthly NARPM meetings that there are a few moments taken to go around the room for each vendor in attendance to introduce themselves and say what they do.
 - C) **Julie also suggested** having an “Agenda” printed up for each meeting that can be passed out to everyone with all members’ names and company names as well as the vendor’s names and what they services they offer.
 - D) **Social Media For Our Local Chapter:** Michael discussed idea from Steve Welty, who was not on the call, for him:
 1. Social Media Marketing for local NARPM Chapter: Steve is pursuing his ideas and when he returns from his honeymoon, will put together a budget to reflect potential costs for enhancing awareness and exposure for NARPM through social media.
 2. Bob mentioned that CALNARPM utilizes “Elite Venue” for all their social media and might be a good source to contact as well.
 3. Michael said he would discuss with Steve when he returns.
 - E) **Recent NARPM Events Discussed:**
 1. Broker/Owner Retreat in Las Vegas: Considered to be successful from all those who attended.
 2. CALNARPM Annual Conference in Napa, CA: Also considered to be a success from all those who attended.
 - F) **Michael reviewed the class schedule for November** where one of the NARPM National classes will be offered for all to take and attend for designation credit. Michael stated all is on target and set up for this event. It will take place on the same day as the November

NARPM meeting, just as it took place in 2016, with the meeting being the lunch break for those taking the class.

- G) **Chapter Excellence**: Michael also stated that he is setting all elements up for Chapter Excellence and has committed to learning exact what to do to meet the expectations and requirements for the Chapter Excellence report each year. He said he will be happy to follow through with completion of the report the next time it is due.
- H) **Review of Board Openings**:
 - 1. Michael said he will volunteer to be the Treasurer after Steve Welty.
 - 2. Michael also said he is submitting Steve Welty's name as the next president-elect after Lisa Fore, who will be the president for 2018.
 - 3. Michael to find out when the election is to be held for next year's Board.
 - 4. Names mentioned for Secretary: Amanda, Becky, and Danielle. Amanda, being on the call, said she will volunteer for the Secretary position. She is currently the Ombudsman.
 - 5. Jim Roth will continue to be the "legal" and primary "lawyer" for the group, but that Kimball, Tirey, and St. John will also bring legal information and updates to the meetings but their intention is not to override Jim Roth's established position in the group.
 - a. Michael stated he has already spoken with KTS that Jim Roth is the legal contact the lawyer for our NARPM chapter meetings.
- I) **Information Packages**: Cheryl brought up the group's interest for the "information packages" that used to be handed out for the attendees. Michael said the information can be sent to him and he will add it to the NARPM Newsletter each time it comes out.
- J) **SDAR Expo on April 27, 2017**: Michael said he has volunteers signed up to cover the NARPM table and he will get the exhibitor badges for the volunteers in order for them to enter the event.
- K) **Meeting Adjourned at 8:56 AM**
- L) **Respectfully Submitted by Cheryl Chase-Berkson, Secretary, May 22, 2017.**

October 9, 2017

NARPM CONFERENCE CALL MEETING MINUTES:

Conference Dial-In Number: (641) 715-3580; Participant Access Code: 914866#

In Attendance:

Michael Braddon, Cheryl Chase-Berkson, Bob Davie, Julie Kern, Pam Neillo, Lisa Fore, Steve Welty, Bob Bixel, Amanda Gresiak

Start: 8:11 AM

Agenda:

- 1) Board Member Elections October 2017 for 2018 Board
 - A) Lisa Fore accepted position as 2018 San Diego Chapter President
 1. One of first duties for 2018 is to line up speakers for the monthly meetings.
 2. Michael Braddon had offered to be Treasurer for 2018. There is now a 2nd candidate for Treasurer, Carolyn Crane. Michael will meet with her to confirm qualifications.
 3. Ballots will be sent out to members for 2018 Board and ballots to be returned by October 25, 2017. Ballots to be ratified by 2017 Board by end of October, 2017.
 4. Michael Braddon will introduce new 2018 Board at following Chapter meeting.
 5. Michael Braddon asked if there was certain software to send out ballots to members. "Survey Monkey" was suggested.
- 2) Personnel Procedures Advanced Course – Nov. 15, 2017- 9 AM to 4 PM – Melissa Prandi, instructor:
 - A) Michael Braddon will encourage attendance to this class at the local Chapter meeting to members at October meeting, October 11, 2017.
 - B) Require 5 attendees to "break even", but prefer and will encourage more attendees.
 - C) Reimbursements to speaker was discussed. Hotel and transportation is only what is paid for by our local Chapter to speaker. Should Honorarium be expected, speaker is to contact NARPM National.
- 3) Fall Speakers: October (KTS – Kimball, Tirey, and St. John – law firm); November (Melissa Prandi – discuss why she is involved in NARPM and value of designations); December (Christmas Luncheon).
- 4) "Marketing The Chapter" – Steve Welty:
 - A) Steve Welty asked what is proper protocol for getting the marketing plan going; cost to be \$200 per month. Steve Welty, Michael Braddon, Bob Davie, and Lisa Fore to meet to clarify and go over marketing proposal. Meeting to be in late October.
 - B) Michael Braddon offered to be the one to keep sending out EVITEs for the meetings.
 - C) Michael Braddon nominated Steve Welty to be "Marketing Chair. All approved.

- 5) Holiday Lunch/Buffer: December 20, 2017 – Bali Hai – Lunch Buffet – Lisa Fore to confirm once “head-count” is determined. Michael Braddon to get the number to Lisa Fore.
- 6) “Get To Know Our Affiliates Better” – Julie Kern, Affiliates Chair
 - A) Michael Braddon to be “Event Chair” and will coordinate with Affiliate Chair, Julie Kern
 - B) Great review and well attended event on September 27, 2017. Great “thank you’s” to Julie Kern for organizing and planning the charity event!
 - C) Julie Kern requested suggestions for future charity events.
 - D) Michael Braddon offered to be Julie Kern’s assistant for future events as Event Chairman
 - E) Julie Kern suggested a specific future venue and for the committee to meet there to “check it out”. Meeting date to be in late October.
 - F) All agreed for Michael Braddon to be “Event Chair”.
- 7) Offer Of Marketing Content & Role With New Affiliates & KTS Role With Our Chapter
- 8) Other Business: None
- 9) Adjourned: 8:46 AM
- 10) Respectfully Submitted by Cheryl Chase-Berkson, Secretary, October 9, 2017

Michael Braddon

From: Michael Braddon <michael@orionmrinc.com>
Sent: Monday, December 4, 2017 3:19 PM
To: 'Lisa Fore'; 'Steve Welty'; Carolyn Crane; 'Amanda Gresiak'
Cc: 'Bob Davie'; Cheryl R. Chase Berkson; 'Pam Neillo'; 'Becky Granger'; 'Dathan Kern'; 'Robert Bixel'; 'Scott Colbert'; 'Mr Rekey San Diego'; 'Michael Braddon'
Subject: RE: SD-NARPM Board Meeting ... December 18th 2017 @ 8 AM PHONE ONLY THANK YOU !!
Importance: High

FYI – REMINDER !!! Chapter Board Meeting December 18th 2017 @ 8 AM PHONE ONLY

Conference Dial-in Number: (641) 715-3580
Participant Access Code: 914866#

Agenda:

- 1) Lisa Fore President Elect for 2018 and [Board Member Elections](#) October 2017 for 2018.

President – Lisa Fore
President Elect - Steve Welty

Treasurer - Carolyn Crane (formerly Steve Welty)

955 Orange Ave, Coronado, CA, 92118
(619) 435-5211
carolyn@crestmontrealty.com

Years of Experience: 33

Specializations: CCRM & SRES, CRS, GRI

Crestmont Property Management offers a comprehensive range of property management services with over 25 years experience in the Southern California and San Diego County markets.

and **NOMINATED Amanda Gresiak as Secretary - (formerly Cheryl Chase-Berkson) VOTE NEEDED**

NOTE: **Kayla Röeder (no show)**

- 2) Personnel Procedures Advanced Course | Nov 15, 2017 | 9 am - 4 pm | Melissa Prandi, MPM® RMP®
- 3) SPRING Speakers ; *Round Table(s) for 2018*
- 4) “Marketing the Chapter” – Steve Welty
- 5) Holiday Dinner – December 20th, 2017 – Thank you again, Lisa Fore !!!
- 6) “Get to know our Affiliates better” – Julie, Affiliates Chair & NOW *Co-Chair for Events* – Michael Braddon
- 7) Marketing Content Newsletter w/ New Affiliate & KTS Role with our Chapter.
- 8) Chapter Excellence – Bob Davie, Michael Braddon, Lisa Fore & Cheryl

9) Other business

Thanks,

Michael

San Diego NARPM Chapter President 2016-17

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

2017 SD-NARPM Board of Directors and Committee Chairs Slate of 2017 Officers and Board

Executive Board: 2017

| | |
|---------------------------|-----------------|
| President: | Michael Braddon |
| Immediate Past President: | Bob Davie |
| Vice-President: | Lisa fore |
| Treasurer: | Steve Welty |
| Secretary: | Cheryl Berkson |
| Ombudsman: | Amanda Gresiak |

Committees/Directors

| | |
|------------------------|------------------------|
| Hospitality: | Becky Granger |
| Affiliates: | Julie Kern |
| Legislation/Education: | Cheryl Berkson |
| Membership: | Bob Bixel & Pam Neillo |
| National Liaison: | Lisa Fore |
| Technology: | Michael Braddon |
| Publicity: | Michael Braddon |
| Historian: | Scott Colbert |

Michael Braddon

From: Michael Braddon <michael@orionmrinc.com>
Sent: Monday, December 4, 2017 3:19 PM
To: 'Lisa Fore'; 'Steve Welty'; Carolyn Crane; 'Amanda Gresiak'
Cc: 'Bob Davie'; Cheryl R. Chase Berkson; 'Pam Neillo'; 'Becky Granger'; 'Dathan Kern'; 'Robert Bixel'; 'Scott Colbert'; 'Mr Rekey San Diego'; 'Michael Braddon'
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Participant Access Code: 914866#

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President Elect - Steve Welty

Treasurer - Carolyn Crane (formerly Steve Welty)

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and **NOMINATED Amanda Gresiak as Secretary - (formerly Cheryl Chase-Berkson) VOTE NEEDED**

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- 3) SPRING Speakers ; *Round Table(s) for 2018*
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- 8) Chapter Excellence – Bob Davie, Michael Braddon, Lisa Fore & Cheryl

9) Other business

Thanks,

Michael

San Diego NARPM Chapter President 2016-17

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

Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Friday, January 6, 2017 10:01 AM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - Jan 18th 2017 (Jan 18, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - JAN 18TH 2017



Event to be held at the following time,
date, and location:

Wednesday, January 18, 2017 from 11:30
AM to 1:30 PM (PST)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



Attend Event

Happy New Year !!!

Our team is ready for our second year term. The newsletter is up and running; later this month we will spotlighting the Affiliate of the Year and Property Manager of the Year. We hope to include the informative handouts that Cheryl has always provided.

We will have our own Cheryl Chase-Berkson, CALNARPM President, update you on the upcoming ...

2017 CALNARPM Conference & Tradeshow that is being held in Napa, California



- April 11-12, 2017 (Education Classes) & April 12-14, 2017 (Conference & Tradeshow)
- **Location:** Napa, CA
- **Hotel:** [Napa Valley Marriott Hotel & Spa](#)

3425 Solano Avenue, Napa, CA 9455

This is the 22nd Annual CALNARPM Conference & Trade Show. Cheryl will talk about the speakers, classes, and how you can be empowered with the exceptional education and networking opportunities.

Our Affiliate Spotlight for January is Bruce Rosenblatt with Rarefied Air Environmental.



Rarefied Air Environmental provides comprehensive indoor air and environmental quality testing

They specialize in the analyses and testing of:

- Asbestos
- Lead
- Mold
- Bacteria
- Soot/Smoke
- Industrial Hygiene

Our company uses only the most trained and certified technicians in California

We look forward to seeing you all on the 18th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

This invitation was sent to michael@orionmrinc.com by [San Diego NARPM Chapter](#) the organizer. To stop receiving invitations from this organizer, you can [unsubscribe](#).

Eventbrite, Inc. | 155 5th St, 7th Floor | San Francisco, CA 94103

*Event ticketing and online
registration by*

Eventbrite

Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Thursday, February 2, 2017 11:01 AM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - Feb 15th 2017 (Feb 15, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - FEB 15TH 2017



Event to be held at the following time,
date, and location:

Wednesday, February 15, 2017 from
11:30 AM to 1:30 PM (PST)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



[Attend Event](#)

Don't forget ...

[2017 CALNARPM Conference & Tradeshow](#) that is being held in Napa,
California



- April 11-12, 2017 (Education Classes) & April 12-14, 2017 (Conference & Tradeshow)
- **Location:** Napa, CA
- **Hotel:** [Napa Valley Marriott Hotel & Spa](#)

3425 Solano Avenue, Napa, CA 9455

This is the 22nd Annual CALNARPM Conference & Trade Show. Cheryl will talk about the speakers, classes, and how you can be empowered with the exceptional education and networking opportunities.

Our Affiliate Spotlight for February is David Kacsur of Budget Blinds



Since its founding, we at Budget Blinds Serving Downtown San Diego have proudly served the local community by offering high quality and stylish window coverings for any occasion. Our goal is simple: to provide you with the best products and services in order to enrich your home environment. Our lavish selection of window treatments includes shutters, blinds, draperies, shades and even window film. Regardless of the window's size or shape, you can rest assured Budget Blinds Serving Downtown San Diego will have a customized window coverings solution ready for you.

www.budgetblinds.com

Our Featured Speaker for February is Mary E. Work, APC

Professional and Occupational License Defense throughout California

Expert Council in BRE Matters



Experience

Since 2004, Mary E. Work, Esq. has been in private practice advising and representing clients who face licensing or regulatory problems. All professional licensing matters in the State of California, except for State Bar matters, are subject to an administrative hearing process before the Office of Administrative Hearings. Mary E. Work has represented thousands of clients facing the denial of, or discipline of, their professional or occupational license. Before beginning private practice in 2004, Mary E. Work acquired the following experience: Prosecutor with the State of California, Department of Real Estate.

Author and Presenter

[California Real Estate Brokers Law and Litigation published by CEB](#) – Chapters 8 and 9 addressing Regulation of Brokers and the DRE (Co-Authored with Paula Reddish Zinnemann).

also Co-author of updates for CEB: California Real Property Sales Transactions

www.dredefenselawyer.com

We look forward to seeing you all on the 15th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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*Event ticketing and online
registration by*

Eventbrite

Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Friday, March 3, 2017 1:01 PM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - March 15th 2017 (Mar 15, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - MARCH 15TH 2017



Event to be held at the following time,
date, and location:

Wednesday, March 15, 2017 from 11:30
AM to 1:30 PM (PDT)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



[Attend Event](#)

Don't forget ...

[2017 CALNARPM Conference & Tradeshow](#) that is being held in Napa,
California



- April 11-12, 2017 (Education Classes) & April 12-14, 2017 (Conference & Tradeshow)
- **Location:** Napa, CA
- **Hotel:** [Napa Valley Marriott Hotel & Spa](#)

3425 Solano Avenue, Napa, CA 9455

This is the 22nd Annual CALNARPM Conference & Trade Show. Cheryl will talk about the speakers, classes, and how you can be empowered with the exceptional education and networking opportunities.

Our Affiliate Spotlight for March is Pat Guiant of PuroClean Emergency Services



PuroClean is expert in property damage caused by water, mold, biohazard, or fire. We provide services from emergency response and mitigation to complete repair and restoration of both residential and commercial property. We are licensed, insured, and an EPA Certified Firm.

[PuroClean](#)

Our Featured Speaker for March is ...

Allison DiSarro

Senior Vice President, Seacoast Commerce Bank

Talking about Trust Accounts and answering your questions ...



About Allison

A successful, driven and experienced Bank Business Development Officer and Relationship Manager for "specialty deposit clients" with a higher focus on Property Management Companies and Homeowners Associations.

As a consistent and top producing BDO and Relationship Manager, I have been entrusted to generate new client relationships as well as retain and grow existing client relationships by assisting them with implementable solutions for their cash management needs and cost savings needs; When fully implemented, they are able to expedite their continued growth in the Commercial or Residential Property Management Industry.

I am a member of property management associations including NARPM, CAI, CACM and NAA as well as banking industry associations such as CBA, ABA and ICBA.

I specialize in banking Broker Trust Accounts; Specifically the compliance set forth by each regions Department of Real Estate, to ensure that my clients are in compliance with their regulatory requirements; for which I am often recognized by the state auditors and consultants.

These factors as well as the trusted relationships that I have built with my clients, has continuously been the reason that I have never lost a client, while most other bankers have a high turnover of clientele.

I manage over 200 client relationships (and growing) across California, Arizona, Chicago and Nevada and I have been named a Top Performer in new business development each year since 2010.

I am originally from the Boston area and have resided and worked in San Diego, CA since early 2010.

We look forward to seeing you all on the 15th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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*Event ticketing and online
registration by*

Eventbrite

Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Friday, April 7, 2017 8:00 AM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - April 19th 2017 (Apr 19, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - APRIL 19TH 2017



Event to be held at the following time,
date, and location:

Wednesday, April 19, 2017 from 11:30
AM to 1:30 PM (PDT)

4845 Ronson Ct 4845 Ronson Court San
Diego, CA 92111

[View Map](#)

Share this event:



[Attend Event](#)

Don't forget ...

2017 CALNARPM Conference & Tradeshow that is being
held in Napa, California



- April 11-12, 2017 (Education Classes) & April 12-14, 2017 (Conference & Tradeshow)
- **Location:** Napa, CA
- **Hotel:** [Napa Valley Marriott Hotel & Spa](#)

3425 Solano Avenue, Napa, CA 9455

This is the 22nd Annual CALNARPM Conference & Trade Show. Cheryl will talk about the speakers, classes, and how you can be empowered with the exceptional education and networking opportunities.

Our Affiliate Spotlight for April is Heidi Bell of Clean Earth Restorations



Clean Earth Restorations is a full service restoration contractor here to help 24/7 to get your home or business restored. We specialize in water damage, mold remediation, trauma scene cleanup and reconstruction. Clean Earth has been in business for over 20 years, we are A rated with the BBB and received numerous awards for exemplary service.

Clean Earth Restorations

Our Featured Speaker for April is ...

Round Tables ...

Get Questions answered by your colleagues and share your Knowledge

Back by popular demand. Everyone has questions and we have a wealth of knowledge from each of our members. Lisa, Cheryl, Steve and I will be hosting the round tables. We have gathered some challenging and interesting topics to get everyone started.

We look forward to seeing you all on the 19th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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Eventbrite, Inc. | 155 5th St, 7th Floor | San Francisco, CA 94103

*Event ticketing and online
registration by*

Eventbrite

Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Monday, May 8, 2017 8:30 PM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - May 17th 2017 (May 17, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - MAY 17TH 2017



Event to be held at the following time,
date, and location:

Wednesday, May 17, 2017 from 11:30 AM
to 1:30 PM (PDT)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



[Attend Event](#)

Our Affiliate Spotlight for May is Same Day Restoration



Same Day Restoration and Cleaning has been in business in San Diego for 9 years. All of our technicians are IICRC Certified and We handle Carpet, Tile, Upholstery, Air

Duct, Dryer Vent and Wood floor cleaning; we also do carpet repairs. We are also trained and certified in Water & Fire damage restoration along with Mold remediation.

Same Day Restoration and Cleaning

Our Featured Speaker for May is ... Scott P. Brady of the Brady Consulting Group

Scott P. Brady operates a property management company, a real estate company and is on a quest to transform the property management industry through the Brady Consulting Group. He believes the property management industry is in the unique position not only to experience explosive growth over the next few years, but also to provide meaningful income opportunities to real estate agents increasingly lost in traditional real estate.

The shifting SMIPO market - "Self Managed Investment Property Owner"



We look forward to seeing you all on the 17th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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Eventbrite, Inc. | 155 5th St, 7th Floor | San Francisco, CA 94103

*Event ticketing and online
registration by*

Eventbrite

Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Friday, June 9, 2017 1:00 PM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - June 21st 2017 (Jun 21, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - JUNE 21ST 2017



Event to be held at the following time,
date, and location:

Wednesday, June 21, 2017 from 11:30
AM to 1:30 PM (PDT)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



Attend Event

Our Affiliate Spotlight for June is Debbie Pierce - Farmers Insurance

Debbie Pierce

Kristine Avram Insurance Agency Inc.

5520 Wellesley St Ste 207

La Mesa, CA 91942

Office: (619) 465-5298

Fax: (619) 465-9667



We are a full service Farmers agency and have been around for 20 years. We specialize in auto, Home, life and commercial. We also sell Health insurance as well as Medicare and Medicare Supplements. If Farmers can't write it, we can find other markets. We take pride on building relationships w/our clients.

Our Featured Speaker for June is our own ... Jim Roth - Attorney at Law



An, AV-rated attorney, Jim Roth has devoted his practice to corporate, real estate and business matters, including insurance law. As general counsel to diverse business entities nationwide, Jim is responsible for developing strategies to minimize risk, navigating complex transactions, and representing his clients' interests in litigation. Jim has successfully tried numerous cases and argued before the California and federal courts of appeals.

He will be sharing his **insight into NEW Laws affecting us this year !!!**

We look forward to seeing you all on the 21st!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

This invitation was sent to michael@orionmrinc.com by [San Diego NARPM Chapter](#) the organizer. To stop receiving invitations from this organizer, you can [unsubscribe](#).

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*Event ticketing and online
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Eventbrite

Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Sunday, August 6, 2017 12:00 PM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - August 16th 2017 (Aug 16, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - AUGUST 16TH 2017



Event to be held at the following time,
date, and location:

Wednesday, August 16, 2017 from 11:30
AM to 1:30 PM (PDT)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



Attend Event

CHAPTER ELECTIONS : OCTOBER 2017

We need YOU !!

2 Years Positions are Opening for:

President Elect
Treasurer
and Secretary !!!

If your interested please come up after the meeting and talk with Michael, our current Chapter President, or other board members. I will be the guy wearing the cowboy hat (smile).

**Spotlight: Affiliate presentation
for August**

will be ... Coastal Tree Care, Inc.



Coastal Tree Care is a full service, licensed, bonded, and fully-insured tree care company based in San Diego. We are experienced in helping your trees thrive in your coastal landscape. From trimming and removing to disease and pest control, you will get outstanding service and expert treatment.

Spotlight: Featured Speaker(s) ...

Phil Ihde & Summer Goralik who are:

BRE Audit Consultants

Phil Ihde Story ...

I am recently retired from CalBRE after a little more than 26 years with the last 11 being in charge of the Southern California Enforcement Division. I spent a lot of time in LA and tried to get down to the San Diego CalBRE office As much as possible.

Summer Goralik Story ...

In 2008, Summer was hired as an Investigator for the California Bureau of Real Estate (CALBRE), formerly the Department of Real Estate, where she investigated hundreds of real estate complaints and was considered a Subject Matter Expert in real estate and escrow. Most recently. Summer was employed as a Civilian Economic Crimes

Investigator for the Orange County District Attorney's Office investigating real estate related crimes in their Real Estate Fraud Unit. Summer is also a California Real Estate Broker.

WE ARE LOOKING FORWARD TO GETTING TO KNOW BOTH Phil & Summer and HAVING A NEW RESOURCE TO HELP WITH PASSING BRE AUDITS.

We look forward to seeing you all on the 16th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Friday, September 8, 2017 1:00 AM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - September 20th 2017 (Sep 20, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - SEPTEMBER 20TH 2017



Event to be held at the following time,
date, and location:

Wednesday, September 20, 2017 from
11:30 AM to 1:30 PM (PDT)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



Attend Event

CHAPTER ELECTIONS: OCTOBER 2017

ANNOUNCING nominations for 2 Year Board Positions!!

President Elect - Steve Welty

Treasurer - Michael Braddon

and Secretary - Kayla Röeder

Spotlight: Affiliate presentation for September 2017

will be ... **Pete Williams Insurance Agency, Inc**



We insure apartments, condominiums, HOAs, single family homes, rental properties, and vacation rentals. With many options from which to choose, we can tailor an insurance plan to meet our client's specific needs.

Pete Williams Insurance Agency, Inc

Spotlight: Featured Speaker ...



Kyle Nelson, Major Account Executive, Multifamily

Our mission is to help people around the world access the opportunities that lead to a higher quality of life, by helping organizations optimize their risk-based decisions and enabling consumers to understand and manage their personal information.

By understanding our customers' evolving needs and creating solutions that help them innovate and grow, we simultaneously create our own opportunities to reinvest and thrive.

We are committed to providing the most complete and multidimensional information available, to help our customers make the best possible choices. To achieve this, we partner with banks, healthcare providers, property managers and other appropriate companies. By painting a broader picture for our customers, they can develop and apply extremely sound and effective business

strategies. We think it only stands to reason, when you continually build upon good choices, you create solid opportunities time and again.

At TransUnion, we value our customers' success as much as our own. That's why we go beyond credit data to offer the insights businesses and consumers need to make informed decisions and achieve great things.

We call this **Information for Good**.

We look forward to seeing you all on the 20th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Wednesday, October 4, 2017 4:33 PM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - MOVED TO October... (Oct 11, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - MOVED TO OCTOBER 11TH 2017 *** NEXT WEDNESDAY ***



Event to be held at the following time,
date, and location:

Wednesday, October 11, 2017 from 11:30
AM to 1:30 PM (PDT)

4845 Ronson Ct
4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



[Attend Event](#)

MEETING MOVED TO THE 11TH ... NO MEETING ON THE 18TH !!!

CHAPTER ELECTIONS: OCTOBER 2017

ANNOUNCING nominations for 2 Year Board Positions!!

President Elect - Steve Welty

Treasurer - Michael Braddon

and Secretary - Kayla Röeder

Spotlight: Affiliate for October

... Mr. Rekey Locksmith



Mr. Rekey Locksmith offers services spanning from coast to coast. Since 1995 our team of industry experts have provided quality commercial and residential locksmith services. Our customer support and technicians are the best in the industry, taking great pride in being prompt and professional with every transaction. Our service comes with a 100% satisfaction guarantee and we are committed to providing excellence and professionalism.

You will experience the Mr. Rekey difference each time you place a service order. We have set the bar high and maintain a progressive state of mind within the locksmith industry.

Mr. Rekey of San Diego

Spotlight: Featured Speaker ...



Kareem Khalidy is an attorney in our Creditors' Rights Practice Group. He has expertise in the field of collection law, creditor's rights and debt collection.

Admitted:

California Bar, 2015

Education:

California Western School of Law, J.D.
University of California, Santa Barbara, B.A., Literature

Areas of Practice:

[Collections/Creditors' Rights](#)

Professional and Civic Engagement:

Former Investigative Research Specialist for Kimball, Tirey & St. John LLP

We look forward to seeing you all on the 11th!

NOTE: This is just a Needed RSVP not a ticket.

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Thursday, October 26, 2017 3:58 PM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - Nov 15th 2017... (Nov 15, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - NOV 15TH 2017 (MELISSA PRANDI)



Event to be held at the following time,
date, and location:

Wednesday, November 15, 2017 from
11:30 AM to 1:30 PM (PST)

SDAR

4845 Ronson Court
San Diego, CA 92111

[View Map](#)

Share this event:



Attend Event

**Please take a minute and RSVP ... SPECIAL
GUEST SPEAKER !!!**

Melissa Prandi MPM®, RMP®, President & CEO

President & CEO of PRANDI Property Management, Inc., CRMC®, has been expertly matching quality tenants with quality homes with her professional PRANDI Staff for over 30 years.

She is a past president of the National Association of Residential Property Managers and is proud of her company's elite CRMC® (Certified Residential Management Company) status. This title has been earned by fewer than thirty-five companies throughout the United States. Actively involved and committed to the community, Melissa serves on several non-profit boards. She is a member of the Central Advisory Board for Bank of Marin, was co-chair for Hospice by the Bay Foundation, and served for six years as the Director of Fair Housing of Marin. Melissa received the "Unsung Hero Award" for her dedication to equal housing opportunity in 2009.

Melissa works tirelessly with her team of committed employees to ensure that their client's residential investment properties run safely and smoothly while in their care. Because her companies do not buy or sell real estate, Melissa and her enthusiastic staff can concentrate on minimizing expenses and maximizing profits for property owners while taking care of tenant needs.

(415) 455-1370 | melissa@prandiprop.com | CalBRE# 00980159



Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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Michael Braddon

From: San Diego NARPM Chapter <invite@eventbrite.com>
Sent: Monday, November 27, 2017 6:35 PM
To: michael@orionmrinc.com
Subject: You're invited to San Diego NARPM Chapter Meeting - Dec 20th 2017... (Dec 20, 2017)

Hello Michael,

You are invited to the following event:

SAN DIEGO NARPM CHAPTER MEETING - DEC 20TH 2017 (HOLIDAY PARTY)



Event to be held at the following time,
date, and location:

Wednesday, December 20, 2017 from
11:30 AM to 1:30 PM (PST)

Bali Hai Restaurant
2230 Shelter Island Dr
San Diego, CA 92106

[View Map](#)

Share this event:



[Attend Event](#)

**We have Limited Seating ... Please RSVP
ASAP !!!**

A return to ... Bali Hai Restaurant

South Pacific Room

December 20, 2017

Wednesday - 11:30 AM to 1:30 PM

**2230 Shelter Island Dr
San Diego, CA 92106**

www.balihairrestaurant.com

**We are having our annual San Diego NARPM Chapter
Holiday Party.**

Lunch is on us !!

All San Diego NARPM Chapter members are invited which includes current Property Managers and Affiliates.

Bali Hai says, thank you for considering them for our special occasion. The Bali Hai has been a San Diego favorite for over 60 years. With spectacular views of the San Diego Bay and downtown skyline, our South Pacific Room and Hawaiian Village are perfect settings for our Holiday Party.

Luau Buffet Menu ENTRÉES:

Jerk spiced and pineapple-rum glazed pork loin or

Teriyaki roasted chicken or

Macadamia nut dusted mahi mahi with soy butter

SIDES:

Seasonal vegetables or Herb roasted red potatoes

SALADS INCLUDED IN BUFFET

House blend local greens, Asian chop salad, or

sesame ginger vinaigrette Island style potato salad or

Island style mashed potato salad

Also included: Bread & butter Coffee, tea, iced tea, & water and Free self-parking.

NOTE: *Alcoholic beverages are available for purchase at main bar.*

IF you have QUESTIONS: Please call Michael at **(619) 796-5836**

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
San Diego NARPM Chapter

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August 15, 2016

NARPM Board Meeting at Mimi's Restaurant: 1:30 – 2:30 PM

Start time: 1:30 PM AM

Those in attendance:

Michael Braddon – President, Cheryl Chase-Berkson – Secretary, Steve Welty – Treasurer, Dathan and Julie Kern– Affiliate Chair, Pam Neillo, and Amanda Gresiak - Ombudsman

AGENDA:

- 1) Michael opened meeting with greeting everyone and saying “Thank You” to everyone for attending the luncheon meeting.
- 2) New Website:
 - A) Michael stated he registered the current NARPM email of michael@sdnarp.org and directed it to the NARPM website.
 - B) Steve brought up members being able to be kept informed of NARPM events on website.
 - C) Michael said the new chapter website is working out well and is being well received. The information is clear and clean. He also stated that Julie keeps him informed as to news of affiliates.
 - D) Michael also stated that edits and changes on the website are now easy and that instructions on “how to edit will be sent to Steve as to how to add and delete members and affiliates.
 - E) Question was brought up as to who does the San Diego Chapter NARPM Facebook page.
- 3) Discussions:
 - A) Pam suggested turning off the “Evite” tickets to the monthly meetings, but Michael stated it was not possible to do.
 - B) Discussion of issues to handle when owners list managed property with a broker other than the broker managing the property.
 - C) Discussion of approaches to business when business is slow versus busy.
- 4) Newsletter:
 - A) Michael said all is working out well with the newsletter.
 - B) Jim Roth, attorney, is turning in great articles.
- 5) Speaker/Presenter Schedule:
 - A) September: Bruce Norris of The Norris Group
 - B) October: Meeting re-scheduled to October 26th due to many members attending National Convention in Maui. Suggested format for meeting to be a round-table discussion of selected topics.
 - C) November: NARPM Educational class set to be taught for the day of the meeting. Class will go from 9:00 AM to 4:00 PM and will be “Advanced Risk Management”. Cost is \$195.00 for members and if paid by October 17th and \$295.00 for non-members and if paid after.

- D) Discussion of marketing this class to other NARPM chapters outside San Diego area. Also to have flyers available at the San Diego Realtor Expo.

*****Please note that subsequent to this meeting, it was decided to have the usual meeting the same day as the educational class and would be the usual time from 11:30 to 1:00.

6) December: Christmas party meeting:

- A) Discussion of where to have it this year. Michael was going to look into venues.

7) Discussion of speakers for 2017:

- A) "Audits" was a topic brought up. It was suggested to have someone other than Pam Strickland as she had spoken several times before. Mary Work was suggested for February, 2017, as was a lawyer who had been in front of the BRE. She would be a free speaker.
B) Reason for a speaker on audits was the statistics are showing that 70 % of audits are on property management companies.

8) San Diego Realtor Expo:

- A) Date is September 13th at the San Diego Convention Center.
B) NARPM will need "shift volunteers" on that Tuesday for every 2 hours, with 2 to 3 people for each shift.
C) NARPM was given a Grant for \$500 towards cost of a booth. The total cost for a booth is \$995.

9) Meeting was adjourned at 2:45 PM.

Minutes Respectfully Submitted By: Cheryl Chase-Berkson

August 20, 2016