



## CHAPTER COMPLIANCE 2023 – DUE MARCH 15, 2023

### C024 SAN DIEGO

Awarded Chapter in Review/Conditional Compliance 2023 for the following reasons:

- Missing attendance at required Chapter Leadership Training in Oct/Nov 2022.

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### Levels of Chapter Recertification

#### **Full recertification**

The chapter has met all recertification requirements, indicated by compliance with items listed on the certificate of compliance. Only fully certified chapters are eligible for Chapter Excellence Awards. Once recertified, an email will be sent.

#### **Chapter in Review (Amended 2022)**

Should the Chapter submittal displays lack of submission of any items on the certificate of compliance. Chapters will have six (6) months from compliance deadline to restore their certification. NARPM® Board of Directors must confirm that a Chapter can be taken off Chapter in Review status.

A Chapter will be placed in **Chapter in Review/Conditional Compliance** if documents are not submitted by compliance deadline. Members of the chapter will not be notified when a Chapter is placed in conditional compliance. The chapter must meet the chapter compliance deadline for the following year.

#### **De-certification**

De-certification must be preceded by a period of Chapter in Review and indicates continued non-compliance of recertification requirements. NARPM Board of Directors must approve all de-certification of chapters.



**CHAPTER COMPLIANCE 2023**  
**ATTENDANCE REQUIREMENTS MET in 2022**

**C024 SAN DIEGO**

Compliance Question:

How many Chapter Leader Calls, hosted by RVPs, did the chapter president, or their representative, participate in? Your chapter president, or their representative, must attend at least two of these calls to obtain chapter compliance.

October 11, 2022 Attendee(s): Danyel Brooks - not on 2022 BOD

December 13, 2022 Attendee(s): Bob Preston - not on 2022 BOD

Chapter Bylaws Requirements for President and/or President-Elect to attend Chapter Leadership Training at Annual Convention on October 20, 2022 AND/OR Nuts and Bolts Virtual Sessions on November 16, 2022.

October 20, 2022 Attendee(s): **NONE**

November 16, 2022 Attendee(s): **NONE**

Bylaws of  
The San Diego Chapter of  
**The National Association of Residential Property Managers**  
Updated April 2023

ARTICLE I: Name, Purposes, Powers and Definitions

Section A: Name

The name of this organization shall be the San Diego chapter of the National Association of Residential Property Managers, Inc., hereinafter referred to as the Chapter.

Section B: Purpose

The purposes for which the organization is established are to:

1. Establish a permanent trade association in the residential property management industry in the greater San Diego County region.
2. To promote a standard of business ethics, professionalism and fair practices among its members.
3. To establish and promote education of its members.
4. To provide and promote an exchange of ideas regarding residential property management.
5. To educate and promote legislative initiative in the San Diego County Region as well as the State of California

Section C: Powers

The chapter may exercise all powers granted to it as a corporation organized under the non-profit corporation laws of the State of California.

1. The chapter shall be subject to all rules, regulations, ethics, and standards and bylaws of the National Association of Residential Property Managers, Inc.
2. Chapter bylaws shall not conflict with those of the National Association of Residential Property Managers, Inc., hereinafter referred to as the national association.

Section D: This chapter's geographical definition shall be: greater San Diego County region

ARTICLE II: Membership

Professional, Associate, Support Staff, Affiliate Member, Honorary Members, and Company Membership.

Section A: Professional Member

Professional Member shall be an individual actively engaged in the management of residential properties as an agent for others. The individual must follow his/her specific state regulatory licensing law regarding licensure in performing the duties of a property manager. This member has completed a course of instruction covering the NARPM® Code of Ethics.

A Professional Member may also be an employee of a company, or employee of a property owner, or employee of an investor, who handles all aspects of residential property management. These individuals must comply with state licensing laws, but do not hold an active real estate license.

Section B: Associate Member – grandfathered January 1, 2021

An Associate Member shall be an individual actively engaged in the management of residential properties as an agent for others. The individual must follow his/her specific state regulatory licensing law regarding licensure in performing the duties of a property manager. An Associate Member cannot hold the RMP® and/or MPM® designation, any certification, or hold elective office. This member has **never** completed a course of instruction covering the NARPM® Code of Ethics.

An Associate Member may also be an employee of a company, or employee of a property owner, or employee of an investor, who handles all aspects of residential property management. These individuals must comply with state licensing laws, but do not hold an active real estate license.

#### Section C: Support Staff

A Support Staff Member shall be a person acting in the role of support in the office of a Professional Member and the Support Staff Member must not be acting in a capacity requiring licensure according to his/her state's regulatory licensing law. A Support Staff Member does not vote or hold elective office.

#### Section D: Affiliate Member

An Affiliate Member shall be an individual or business entity, which provides products, services or expertise to the residential property management industry. Requirements relating to acceptance into affiliate membership, suspension of affiliate membership shall be identical to those specified for members, except that affiliate members are not eligible to vote; However, affiliate members CAN be a chairperson and CAN serve in advisory positions to the executive committee or chairpersons or committee members. An affiliate member does not vote or hold elective office.

The Chapter **shall not** recognize all NARPM® National Affiliate Members as Affiliate Members of this Chapter.

#### Section E: Honorary Member

Honorary membership shall be bestowed upon individuals who, are recommended by the chapter board of directors and have rendered distinguished service to the Chapter or to the profession of property management. Honorary members shall pay no dues or other assessments to the Chapter, and shall be eligible to participate in the usual activities of the Chapter, except they shall be ineligible to vote, hold office or serve as a member of the executive committee.

#### Section F: Life Member

Life members shall be all national past Presidents of NARPM®. Life membership will begin as the President's term is completed. Dues will be waived for Life members. Other members who qualify may apply for Life Member as outlined in the national bylaws and complete the approved application.

Life Members shall not pay dues and are strongly encouraged to complete a course of instruction covering the NARPM® Code of Ethics. They shall be eligible to participate in the usual activities of the Association and its Committees and are eligible to vote and hold office.

- All Past Presidents shall be deemed Life Professional Members of the Association
- Shall be bestowed upon individuals who have retired from the property management business and, in the opinion of the Board of Directors, have rendered, or continue to render, distinguished service to the Association or the property management profession. An application to the NARPM® National Board of Director must be approved in order to hold this membership type.

#### Section G: Company Membership

Company Membership is offered to the responsible individual of the company. In order to hold Company Membership, the company must have four (4) members, which is a combination of Professional and Support members, with two (2) out of the four (4) being Professional members. Additional Professional Members, Support Staff and Associate Members may register under the company for an additional fee. Membership categories under the Company will follow the same eligibilities and requirements as outlined above.

#### Section H: Application by Professional, Associate, or Support Staff. Members:

1. Acceptance into membership: An applicant for membership in a chapter shall first be a member of the national association. A member of the national association may be a member of more than one chapter as long as that member meets all requirements for each chapter membership. New Members must complete a Code of Ethics course of instruction from the National Association of Residential Property Managers to become a Professional Member.
2. Vote: Voting member shall be eligible-to vote in person or via electronic voting method at the annual meeting or via electronic ballot of the chapter in which officers are elected. Any member shall be eligible to vote at all meetings of sub-committees upon which the member serves, if any.

### ARTICLE III: Suspension, Termination and Resignation of Membership

#### Section A: Suspension of Membership

Suspension of membership shall result in a member being unable to vote in chapter matters for a period of time designated by these or the national association bylaws or, where such discretion is authorized by the national association, for any one of the following reasons:

1. Suspension of membership: Suspension of membership for reasons stated in the bylaws of the national association.
2. By notification of the National NARPM® Board of Directors as a result of violations of the Code of Ethics and Standards of Professionalism.

#### Section B: Termination of Membership

Membership shall be terminated for reasons identified below. Upon termination, a member shall lose all rights and interests in the chapter and the national association.

1. Resignation:
  - a. Any member, other than Affiliate Member, may resign at any time by forwarding a letter stating such intent to the San Diego Chapter of NARPM and the National Association, if applicable. The letter shall indicate the date on which the resignation is effective. No refund of chapter or national association dues shall be made for any reason.
  - b. Affiliate member may resign at any time by forwarding a letter stating such intent to the Chapter. The letter shall indicate the date on which the resignation is effective. No refund of chapter or national association dues shall be made for any reason.
2. Failure to Pay Obligations: Membership shall terminate automatically when a member fails to pay annual Chapter dues within 75 days of the due date. Members may file a letter of appeal to the executive committee should an extension be needed to pay obligation.
3. Delinquency in Payments: Any member failing to pay sums due to the National Association within 30 calendar days of an invoice due date, shall be considered delinquent. Delinquency status shall remain in effect for one year, or until payment of obligations is made in full, whichever occurs first.
4. Code of Ethics Violations: By notification from the National Association to the Chapter executive committee, of a violation(s) of the Code of Ethics and Standards of Professionalism or for non-payment of national annual dues.

#### Section C: Transferring in a Company membership:

The use of Company membership will enable the transfer of memberships to other people in their company. In order to transfer membership, proof of termination from the licensing division, showing evidence that the person has left the firm, is required. For Support Staff, or in states where licensing is not required, other proof of termination must be submitted.

#### Section D: Reinstatement of Membership

A former member still meeting all membership requirements shall be reinstated:

1. Upon request, if such request is received during the calendar year during which a resignation occurred.
2. Upon request, provided that all financial indebtedness incurred has been paid and is current.
3. After a waiting period of one calendar year from the date of termination as a result of a presidential request or by an action of the board of directors of the national association.
4. Request through the normal application procedures, if the resignation occurred beyond the current fiscal year.

## ARTICLE IV: Executive Committee/Board of Directors

### Section A: Responsibilities

The chapter executive committee/board of directors, hereinafter known as the committee, shall have responsibility for the management of the chapter and shall exercise all rights and powers not expressly reserved by these bylaws or the bylaws of the national association. Such management responsibilities shall include, but not be limited to:

1. Establishing and implementing an organization framework for the chapter.
2. Establishing new or modifying existing operating rules that are not inconsistent with these bylaws, the bylaws of the national association or their intent. Changes to the bylaws must be submitted to the board of directors of the national association for approval.
3. Establishing annual chapter dues, application fees and special assessments.
4. Establishing new committees and dissolving existing committees.

### Section B: The Executive Committee

All chapter executive committee members should faithfully attend all chapter executive committee meetings, the executive committee, hereinafter known as the committee, shall be composed of Five (5) officers as follows:

1. President: The president shall:
  - a. Be the chief executive officer of the chapter.
  - b. Preside at all meetings of the chapter.
  - c. Act as an alternate signatory for funds withdrawn from the chapter account(s).
  - d. Sign all legal documents.
  - e. Undertake responsibility for such other activities as deemed appropriate by the committee.
  - f. Shall ensure the completion of all documentation required by the National Association.
  - g. Serve a term of two years commencing with the beginning of the new calendar year.
  - h. Must be a Professional Member of the Chapter.
  - i. Must attend annual Board Leadership Training offered by the National Association of Residential Property Managers. [REQUIRED]
2. President-Elect: The president-elect shall:
  - a. Act as an alternate signatory for funds to be withdrawn from the chapter account(s).
  - b. Fulfill the responsibilities of the president during his/her absence.
  - c. Replace the president at the end of the fiscal year.
  - d. Automatically accede to the presidency during a calendar year when the presidency becomes vacant.
  - e. Undertake other activities as are deemed appropriate by the president.
  - f. Serve a term of two years commencing with the beginning of the calendar year.
  - g. Must be a Professional Member of the Chapter.
  - h. Notify all chapter members of upcoming meetings
  - i. Coordinate speakers and lecturers that are relevant to the residential industry for chapter meetings.
  - j. Undertake responsibility for such other activities as deemed appropriate by the committee.
  - k. Oversee the submission of Chapter reports including Chapter Excellence submission
  - l. Must be back up for attendance at annual Board Leadership Training offered by the National Association of Residential Property Managers if the President is unable to attend. [REQUIRED]
3. Secretary: The secretary shall:
  - a. Maintain current chapter membership records to coincide with the national association's membership database.
  - b. Record, maintain and distribute minutes of all regular and special meetings of the committee as appropriate.
  - c. File all federal, state and local reports as needed.
  - d. Undertake responsibility for such other activities as deemed appropriate by the committee.
  - e. Serve a term of two years commencing with the beginning of the calendar year.
  - f. Must be a Professional Member of the Chapter.
4. Treasurer: The treasurer shall:
  - a. Be a signatory for all funds withdrawn from chapter account(s).
  - b. Distribute annual renewal notices for chapter dues and special assessments.
  - c. Deposit all funds into a federally insured financial institution.

- d. Prepare a financial report for the committee upon request.
- e. Prepare an end-of-fiscal year report for the national association.
- f. File tax and other financial reports with the appropriate government agencies.
- g. Undertake responsibility for other such activities as deemed appropriate by the committee.
- h. Serve a term of two years commencing with the beginning of the calendar year.
- i. Must be a Professional Member of the Chapter.

5. Past President

- a. Shall serve as Chairman of the Nominating Committee
- b. Undertake responsibilities as assigned by the President
- c. Serve a term of two years commencing with the beginning of the calendar year.

ARTICLE V: Eligibility, Nominations, Elections, Terms of Office and Vacancies

Section A: Eligibility

To be eligible to serve as a chapter officer, an individual shall be a member in good standing with both the chapter and the national association. Furthermore, the chapter member must be willing to fulfill the duties of the office to which he/she is elected, including those duties relating to the national association.

Section B: Notification of Members

Chapter members shall be notified in writing, or electronically if approved by the Chapter Executive Committee, of the pending election and nominations solicited from chapter members at least thirty (30) days prior to the end of the calendar year. Nominations shall be done in two ways:

- a. Write-in: Any member who writes in the name of a nominee shall provide a signed letter from the individual so nominated indicating the said individual's willingness to serve if elected and signed by five percent (5%) of the professional chapter members.
- b. In Person: Any member who is present during the electoral process can be nominated.

Section C: Elections

Elections shall be conducted no later than the September chapter meeting, or electronically no later than the month of September, if approved by the chapter executive committee, prior to the end of the calendar year.

- 1. Presiding Authority: The outgoing president shall conduct the election. The outgoing president can delegate the electoral process to the president-elect or any other chapter member provided that member is not a nominee.
- 2. Nominating Committee – The immediate past president shall serve as chair of the nominating committee and the President shall appoint the other two members of the committee. The recommendation of the Nominating Committee shall be approved by the **San Diego Chapter of NARPM** Executive Committee and presented to the membership for final vote.
- 3. Uncontested Offices: The presiding authority shall identify **to the membership** those offices for which there is only one nominee. Upon a motion to close the nominations for such offices, that nominee shall be considered duly elected.
- 4. Contested Offices: In the case of contested office(s), each office shall be dealt with through a ballot presented to those who are in attendance at the chapter meeting, or electronically if approved by the chapter executive committee. The nominee receiving a simple majority shall be elected to the position.
- 5. **The Chapter SHALL allow nominations from the floor of the chapter meeting. If electronic elections take place write-In Candidates must be solicited. Write-in candidates shall be added to the slate if said candidate's names are presented in writing to the Nominating Committee thirty (30) days before the election, accompanied by the signatures of ten percent (10%) of the professional members in good standing recommending the candidates for a director or for an officer position.**

Section D: Term of Office

An officer's term of office shall commence with the beginning of the chapters calendar year and conclude at the end of the same. Officer terms are two consecutive years.

#### Section E: Vacancy

An office shall be declared vacant when an officer:

1. Resigns that office through written notification to the president or the secretary.
2. Is no longer eligible for membership in the chapter or the national association.
3. Is no longer capable of fulfilling duties of the office involved.

#### Section F: Filling a Vacated Office

In the event that the position of president is vacated, the president-elect shall automatically fill that position and shall continue to serve as both president and president-elect. In the case of other officers, a vacated office shall be filled:

1. When: When more than three (3) calendar months remain before the next election at which the vacancy shall be filled.
2. Procedure: By an individual nominated and approved by the executive committee **to fill the remaining year of the term. At the next election, the remainder of the term for the office must be filled through the nominations process.**

### ARTICLE VI: Meetings, Locations and Majority Rules

Section A: The executive committee shall meet with the same frequency as the chapter meetings, or at a time approved by the chapter executive committee, **which must be no fewer than four (4) meetings annually.**

1. Notice of Regular Meeting: With the advice and consent of the president, the secretary shall notify all members of the executive committee of the date, time and place by regular letter mailed to each member of the committee.
2. Waiver of Notice: Attendance by any member of the executive committee at a regularly scheduled meeting at which date, time and place is established for the next meeting shall constitute a waiver of notice of the next regular meeting of the committee.
3. Electronic Meetings: If approved by the chapter executive committee, meeting can be held electronically in order to conduct the business of the chapter.

#### Section B: Location

All meetings of the chapter shall be held within the geographic definition of the chapter. All meetings of the executive committee shall be held within the geographic definition of the chapter unless otherwise waived by all the members of the executive committee. Annual meeting location of the Chapter shall be approved by the Executive Committee.

#### Section C: Quorum

1. A Majority of the executive committee officers in attendance shall constitute a quorum.
2. Quorum: A quorum to conduct business by the members shall be 10% of the member eligible to vote at a regularly scheduled meeting. A chapter event can be held without a quorum but no business can be conducted

#### Section D: Simple Majority Vote

All actions and decisions of the executive committee shall be made official by simple majority vote of the members present at any regular or special meeting of the committee, unless otherwise precluded by law.



## ARTICLE VII: Committees

### Section A: Appointment

Except as otherwise stated in these bylaws or the bylaws of the national association, the chairpersons and members of all sub-committees shall be appointed by the president with the advice and consent of the executive committee.

### Section B: Responsibilities

Committees shall undertake such responsibilities as are identified in these bylaws or as may be assigned to them by the president with the advice and consent of the executive committee. No sub-committee may take any action on behalf of or representative of the chapter unless specifically authorized by the executive committee.

### Section C: Creation and Dissolution

The president, with the advice and consent of the executive committee, shall have the authority to create and dissolve sub-committees according to the needs of the chapter.

## ARTICLE VIII: Code of Ethics & Standards of Professionalism.

### Acknowledgment and Enforcement

The Code of Ethics and Standards of Professionalism shall be approved by the National NARPM Board of Directors.

As a condition of membership all Professional Members of NARPM® must complete a NARPM® Code of Ethics training. Each Professional Member of the association is required to complete a NARPM® approved ethics training either in classroom or through other means within ninety (90) days of making application, as approved by the board of directors of NARPM®. The association shall design a new course of instruction each four-year period to meet the requirement of membership.

Failure to satisfy this requirement within ninety (90) days of making application to the association will; result in the membership of the Conditional Member being suspended. If a Conditional Member has not taken the new member ethics class during their first year (12 months) of application, they will be terminated and will need to reapply for new membership.

**Section A. Acknowledgment:** Each applicant for membership in the Association shall read and be familiar with the Association Code of Ethics and Standards of Professionalism. Continual adherence to the Code is mandatory for membership in the Association. Professional Members shall have successfully completed a course of instruction on the NARPM® Code of Ethics.

**Section B. Enforcement:** The Board of Directors shall be responsible for enforcement of the Code of Ethics and Standards of Professionalism. Should a complaint be filed with the Board, the Board is charged with being fair and equitable to both Complainant and Respondent. The complaint will be turned over to the Professional Standards Sub-Committee to investigate violations. The Committee shall report its findings to the Board; the Board will make a determination on the charges and take appropriate action.

### Section A: Chapter Charter

A Chapter Charter is granted **by the National Association of Residential Property Managers, Inc**, only upon the acknowledgment that the chapter members shall:

1. **Be familiar with Code:** Read and be familiar with the applicable Code of Ethics to which continual adherence is mandatory for continuation of a Chapter Charter and individual membership.
2. **Be Unopposed to Application:** By receipt of the Chapter Charter, the chapter does hereby formally agree to not take any legal action(s) against the national association, its officer(s), director(s), committee chairperson(s), committee member(s) or the chapter, its officer(s), sub-committee chairperson(s) or sub-committee member(s) for any prescribed action identified by these bylaws or the bylaws of the national association taken for the purpose of enforcing the applicable Code of Ethics and Standards of Professionalism.

Section B: Enforcement

It is the duty of the President of the chapter to report all violations to national association's Code of Ethics and Standards of Professionalism to the national association's grievance committee.

ARTICLE IX: Financial Considerations

Section A: Calendar Year

The chapter's financial year shall be a calendar year.

Section B: Chapter Dues

A The Chapter may charge annual and pro-rated dues, subject to approval by the national association, as outlined below:

1. Payable: Dues for local chapters are payable no later than January 1 of each year.
2. Non-payment of Dues: Failure to pay the annual chapter dues within [90] days after the first day of the year shall result in automatic termination of chapter membership unless there are extenuating circumstances.
3. Member Dues: The amount of the Chapter dues for all members and each class of membership shall be established annually by the board of directors during the budgeting process.
4. Affiliate dues: The amount of local chapter dues for Affiliate dues shall be established annually by the board of directors during the budgeting process. The chapter will charge dues to National Affiliate members.
5. Late Fees: Any payment received after the due date will be considered late, and a late fee will be assessed. The Board of Directors must approve any schedule of late fees or returned check fees during the budgeting process.

Section C: Special Assessments

Special Assessments may be established by the executive committee and imposed upon its chapter members and/or affiliate members for a specific funding purpose. The purpose and amount of any special assessment shall be announced at a regular or special meeting of the chapter prior to the imposition of such an assessment. No more than one special assessment may be imposed in any calendar year.

Section D: Budget

The treasurer, in conjunction with the executive committee, shall prepare an itemized budget of income and expenses for each calendar year. The budget shall not exceed the chapter's ability to pay the same and shall be approved by the San Diego Chapter of NARPM Executive Committee or Board of Directors.

Section E: Non-Binding

The chapter shall not have any authority to financially obligate or bind the **National Association of Residential Property Managers, Inc.**, for any reason.

ARTICLE X: Proposals and Procedures for Amending

Section A: Proposals

Amendments to these bylaws may be proposed by any chapter member or board of director of the **National Association of Residential Property Managers, Inc.**, at any time through a letter addressed to the executive committee and presented or mailed to the secretary. Any proposal shall be studied by the entire executive committee or an officer of the executive committee or by a sub-committee created and/or assigned for that purpose as appointed by the president.

Section B: Procedure for Amending

The entity assigned for the purpose of reviewing proposed Bylaw revisions shall present the proposed amendment to the executive committee with its findings and proposed recommendations of actions. A two-thirds majority of the Executive Committee is necessary in order to amend these bylaws.

Once approved by the Chapter Executive Committee, amendments shall be subject to approval by the board of directors of the **National Association of Residential Property Managers, Inc.**, prior to their implementation or adoption by the chapter and a final copy of these bylaws are to remain on file at national's office.

#### ARTICLE XI: Miscellaneous

##### Section A: Invalidity

The invalidity of any provision of these bylaws shall not impair or affect in any manner the validity, enforceability or affect of the remainder of these bylaws.

##### Section B: Waiver

No provision of these bylaws shall be deemed to have been abrogated or waived by reason of any failure to enforce the same, regardless of the number of violations or breaches which may have occurred.

##### Section C: Hold Harmless and Indemnify

The chapter shall hold harmless and indemnify members of the executive committee, officer(s), sub-committee chairperson(s) and sub-committee members, as well as the national association, its board of directors, officers, chairpersons and committee members who are acting within the scope of their responsibilities, duties or these bylaws.

##### Section D: State Laws

These bylaws may be amended to conform and comply with the laws, statutes, rules, and regulations of the governing bodies of local, county and/or state authorities that have jurisdiction. Should amendments to these bylaws be required by California state law, Chapter shall notify the National Association of said amendments, but no further action will be required.

#### **Section E. Sexual Harassment**

The National Association of Residential Property Managers™ (NARPM) has adopted a zero-tolerance policy toward discrimination and all forms of unlawful harassment, including but not limited to sexual harassment. This zero-tolerance policy means that no form of unlawful discriminatory or harassing conduct by or towards any employee, member, vendor, or other person in our workplace and at our events/meetings will be tolerated.

NARPM is committed to enforcing its policy at all levels within the Association. Any officer, director, volunteer, member, or employee who engages in prohibited discrimination or harassment will be subject to discipline, up to and including immediate discharge from employment or dismissal from the association.

**Reporting Without Fear of Retaliation:** No Association member will be retaliated against for reporting harassment. This no-retaliation policy applies whether a good faith complaint of harassment is well founded or ultimately determined to be unfounded. No Association officer, director, volunteer, or member is authorized, or permitted, to retaliate or to take any adverse action whatsoever against anyone for reporting unlawful harassment, or for opposing any other discriminatory practice.

##### Section F: Dissolution

Should the membership vote by majority to dissolve the operations of the San Diego Chapter, all remaining funds in the treasury will be sent to the National Association of Residential Property Managers.



## Confirmation

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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:** 2022
- **Tax Year Start Date:** 01-01-2022
- **Tax Year End Date:** 12-31-2022
- **Submission ID:** 10065520230446159072
- **Filing Status Date:** 02-13-2023
- **Filing Status:** Accepted

**MANAGE FORM 990-N SUBMISSIONS**

## SD Chapter NARPM

### Balance Sheet

As of December 31, 2021

## SD Chapter NARPM

### Balance Sheet

As of December 31,  
2022 **PROFORMA**

## SD Chapter NARPM

### Balance Sheet

As of December 31,  
2023 **BUDGET**

	TOTAL		
<b>ASSETS</b>			
Current Assets Bank Accounts			
Checking	29,085.63	30,539.91	32,066.91
Merchant Services	0.00	0.00	0.00
PayPal	0.00	0.00	0.00
Total Bank Accounts	\$29,085.63	30,539.91	32,066.91
Total Current Assets	\$29,085.63	30,539.91	32,066.91
<b>TOTAL ASSETS</b>	<b>\$29,085.63</b>	<b>30,539.91</b>	<b>32,066.91</b>
<b>LIABILITIES AND EQUITY</b>			
Liabilities			
Current Liabilities			
Other Current Liabilities			
Refunds Payable	0.00		
Total Other Current Liabilities	\$0.00		
Total Current liabilities	\$0.00		
Total Liabilities	\$0.00		
Equity			
Unrestricted Net Assets	36,224.03	38,035.23	39,936.99
Net Income	-7,138.40	-7,495.32	-7,870.09
Total Equity	\$29,085.63	30,539.91	32,066.91
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$29,085.63</b>	<b>30,539.91</b>	<b>32,066.91</b>

**SD Chapter NARPM**Profit and Loss  
January - December 2021**SD Chapter  
NARPM**Profit and Loss  
January - December  
**2022 PROFORMA****SD Chapter  
NARPM**Profit and Loss  
January - December  
**2023 BUDGET**

	TOTAL		
Income			
Chapter Excellence Incentive	860.00	903.00	948.15
Meeting Coupon	-15.00	-15.75	-16.54
Memberships	3,930.00	4,126.50	4,332.83
Monthly Chapter Meetings	2,555.00	2,682.75	2,816.89
Total Income	\$7,330.00	7,696.50	8,081.33
GROSS PROFIT	\$7,330.00	7,696.50	8,081.33
Expenses			
Advertising/Promotional	500.00	525.00	551.25
Business Expenses	0.00	0.00	0.00
Board Meetings	3,000.00	3,150.00	3,307.50
Computer Software	2,000.00	2,100.00	2,205.00
Corporate Filing Fees	49.99	52.49	55.11
Total Business Expenses	5,049.99	5,302.49	5,567.61
Chapter Meetings	0.00	0.00	0.00
Awards	173.85	182.54	191.67
Holiday Party	1,434.54	1,506.27	1,581.58
Luncheon Expense	2,428.04	2,549.44	2,676.91
Total Chapter Meetings	4,036.43	4,238.25	4,450.16
Contract Services	0.00	0.00	0.00
Accounting Fees	1,255.20	1,317.96	1,383.86
Legal Fees	123.95	130.15	136.65
Outside Contract Services	500.00	525.00	551.25
Website	1,614.00	1,694.70	1,779.44
Total Contract Services	3,493.15	3,667.81	3,851.20
Operations	0.00	0.00	0.00
Insurance	1,192.35	1,251.97	1,314.57
Merchant Fees	151.60	159.18	167.14
PayPal Fee	44.88	47.12	49.48
Total Operations	1,388.83	1,458.27	1,531.19
Total Expenses	\$14,468.40	15,191.82	15,951.41
NET OPERATING INCOME	-\$ 7,138.40	-7,495.32	-7,870.09
NET INCOME	-\$ 7,138.40	-7,495.32	-7,870.09

**Reminder! San Diego NARPM Jan 2022 Meeting**

NARPM San Diego Chapter &lt;president@sdnarp.org&gt;

Mon 1/17/2022 7:11 AM

To: mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;

1 attachments (137 KB)

labor\_law\_update\_2022\_flyer.pdf;

**California and Federal Employment Laws plus Cal Savers - NARPM San Diego Monthly Meeting - January 2022****When**

January 19, 2022

11:30 AM - 1:30 PM

[Add to Calendar](#)**Tickets**

\$20.00 Member Registration

\$40.00 Non-Member  
Registration[Register Now](#)**Directions**Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103[Get Directions](#)

David Dare of Green Leaf Business Solutions will be discussing California Labor Laws, Federal Labor Laws and the new Cal Savers Requirements. If you have one employee you won't want to miss and if you have 5 or more employees you can't afford to miss.

**Meeting Schedule**


11:30 - 12:00 - Lunch &amp; Networking

12:00 - 12:15 - Meeting Open &amp; Chapter Updates

12:15 - 12:30 - Meeting Sponsor Speaks


12:30 - 1:30 - Spotlight Presenter Speaks

**THANKS TO OUR MEETING  
SPONSOR!**



**2022 Labor Law Update**

- **CA Labor Law Update**
  - AB 1033
    - Wage Theft, Protected Time Off
  - SB 331
    - Non-Disclosure and Non-Disparagement Provisions in Settlement, Separation, and Asset Protection Agreements (SB 331)
  - SB807
    - Employers Compelled to Cooperate With DFEH Civil Rights Investigations (SB 807)
  - SB 606
    - Workplace Safety Enhanced at Employers With Multiple Worksites (SB 606)
  - AB 5
    - Expanded Exceptions to Independent Contractor AB5 Test
  - AB 1171
    - Criminal Background Checks
  - SB 657
    - Employee Notifications
  - Minimum Wage and Salary Increase
  - Obligation to Notify Public Health Agencies of a COVID-19 Outbreak
  - Lots More!
- **Federal Labor Law Update**
  - Wage & Hour
  - Government Contractors
  - Healthcare Industry
  - Companies of 100 or more employees
- **Cal Savers Requirement**
  - 100 employees or more
  - 50 or more employees
  - 5 employees or more
  - Your Options



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## Reminder! Becoming CEO The Few Things That Matter - NARPM San Diego Feb 2022 Meeting

NARPM San Diego Chapter <president@sdnarp.org>

Wed 2/16/2022 6:50 AM

To: mbraddon@hotmail.com <mbraddon@hotmail.com>



National Association of Residential Property Managers

S A N D I E G O C H A P T E R

### Becoming CEO The Few Things That Matter

## Becoming CEO The Few Things That Matter

Wednesday,  
February 16, 2022

PRESENTED BY STEVE WELTY



**Are you trying to do less, but get more done?**

**Have you struggled giving up control of some areas?**

**Are you ready to make changes to improve your life and business?**

Steve Welty is the CEO of Good Life Property Management in San Diego. His team manages 850 doors and he has answered yes to these questions.



Steve shares his experience of becoming CEO, what lessons he's learned, and how you can make the changes necessary to be who you want to be in your company.

*"What got you out of Egypt won't get you to the promised land"*  
God (loosely quoted)

Join Steve on a journey to your next level of income and impact.

---

Wednesday, February 16, 2022

11:30am - 1:30pm

NARPM Members \$20

Non-Members/Guests \$40

[REGISTER NOW](#)

CONTACT

Mark Scott

[msscott@encorerealtysd.com](mailto:msscott@encorerealtysd.com)

**THANKS TO OUR MEETING SPONSOR**



If you haven't been to our new meeting location now is the time to come check it out!

Plenty of parking, large venue, sound system, views of downtown.

**MEETING LOCATION**





**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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Reminder! Kimball, Tirey, & St. John Legal Update - NARPM San Diego Monthly Meeting - March 2022

NARPM San Diego Chapter <president@sdnarpm.org>

Tue 3/1/2022 10:39 AM

To: mbraddon@hotmail.com <mbraddon@hotmail.com>



National Association of Residential Property Managers


S A N D I E G O C H A P T E R

**Kimball, Tirey, & St. John Legal Update**

**KIMBALL, TIREY, &  
ST. JOHN  
LEGAL UPDATE**

Update on new laws and legal trends in  
California and some local jurisdictions.

WEDNESDAY, MARCH 16, 2022



11:30AM - 1:30PM

Tracey Merrell with KTS has presented to our club many times and is always worth your effort to hear and see her speak. She will give us an update on new laws and legal trends in California and some local jurisdictions.



Tracey Merrell is the Managing Partner of Education with Kimball Tirey & St. John LLP. She began her career representing banks in post foreclosure evictions throughout all 58 counties in California. As bank owned foreclosures slowed down, she transitioned into evictions for management companies and individual owners. She is experienced in all aspects of litigation, from the development of case strategy, through discovery, depositions, motion practice, and trials including bench and jury. She joined KTS as a trial attorney and has extensive experience in court making hundreds of appearances a year since joining the firm. Ms. Merrell transitioned to the Education Department to further her goal of providing training and knowledge to both clients and staff.

## WHEN

Wednesday  
March 16, 2022

## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

If you haven't been to our new meeting location now is the time to come check it out!  
Plenty of parking, large venue, sound system, views of downtown.

MEETING LOCATION







**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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## Last Chance! Marc Cunningham - The Lost Art of Professionalism - April 2022

NARPM San Diego Chapter &lt;president@sdnarpm.org&gt;

Tue 4/19/2022 6:08 AM

To: mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



National Association of Residential Property Managers

S A N D I E G O C H A P T E R

## THE LOST ART OF PROFESSIONALISM



NARPM SAN DIEGO 

## THE LOST ART OF PROFESSIONALISM

Wed. April 20, 2022  
11:30AM - 1:30PM

**Marc Cunningham**

**REGISTER NOW!**

The success of your property management business is largely dependent on who you allow into your owner-client group. In this fast moving session we will focus how to improve your professionalism to attract GREAT owner-clients including:

- What should be the proper mindset of a successful PM?
- What is the difference between an owner transaction and an owner relationship?
- Three words you should never use in your advertising (but most PMs do!)
- How to qualify prospective owner-clients
- Should you negotiate your management agreement terms?
- How to never get sued

- This session will empower you to stop asking owners to 'choose' you, and instead position yourself as the professional - so owners are asking YOU to 'choose' them!



Marc grew up in the real estate world and spent many years pulling weeds, painting walls, showing properties, and collecting rents for Grace Property Management, the company his father founded in 1978. Today, from a platform of managing over 900 rental properties with 20 team members, Grace Management helps people buy, sell, invest, flip, collect rent, evict, and have fun doing it!

If you are more impressed with initials after a name - Marc is the President of Grace Property Management & Real Estate, holds a degree in Real Estate & Finance, has taught CE classes in over 20 states, has been featured in multiple national real estate publications, holds multiple designations, and was just named the 2018 national property manager of the year by Think Realty.

## WHEN

Wednesday  
April 20, 2022

## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

**THANK YOU TO OUR MEETING SPONSOR**

If you haven't been to our new meeting location now is the time to come check it out!  
Plenty of parking, large venue, sound system, views of downtown.

#### MEETING LOCATION







NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER



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**Reminder! NARPM San Diego Meeting Learn about SB721 Mandatory Balcony Inspections & Sponsor San Diego Flood Restoration**

NARPM San Diego Chapter <president@sdnarpm.org>

Mon 5/9/2022 1:28 PM


To: mbraddon@hotmail.com <mbraddon@hotmail.com>



**NARPM™**  
National Association of Residential Property Managers  
S A N D I E G O C H A P T E R

**Learn about SB721 Mandatory Balcony Inspections  
& Our Sponsor San Diego Flood Restoration**

**NARPM SAN DIEGO PRESENTS** ←



**Learn about  
SB721  
Mandatory  
Balcony  
Inspections**

**WEDNESDAY, MAY 18, 2022**

Come learn about balcony inspections from Felicia Baker, CMCA, AMS from AD Magellan Construction Management. Their firm provides the mandatory SB721 inspections along with other services for construction projects. They're a construction management planning firm who develops the scope of work and goes out to bid for the client. Once the client selects a contractor, they can oversee the project with construction management services. Invoice and change order



review along with physical onsite inspections during the project. Their value comes from not doing the actual work but verifying the client is getting what they pay for on time and on budget.

## SB721 QUICK FACTS

Mandatory inspection of a sample of 15% of exterior elevated elements on buildings with 3 or more multi-family units.

- The first inspection is required before January 1, 2025. Subsequent inspections **MUST** occur every 6 years after the first inspection has been completed
- Inspection to be performed by a licensed architect, licensed civil or structural engineer, a building contractor with 5 years of experience, or an individual certified as a building inspector or building official
- Allow your inspection report to be a resource to proactively plan for the phasing and funding of future repair work

 CONSTRUCTION PLANNING  
& MANAGEMENT



## WHEN

Wednesday  
May 18, 2022

## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates

12:15 - 12:30 - Meeting Sponsor Speaks

12:30 - 1:30 - Spotlight Presenter Speaks

**THANKS TO OUR MEETING SPONSOR**



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#### MEETING LOCATION





**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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## NARPM San Diego Meeting - Learn the New Rules for Vacation Rentals (STVR)

NARPM San Diego Chapter <president@sdnarp.org>

Tue 6/7/2022 4:10 PM

To: mbraddon@hotmail.com <mbraddon@hotmail.com>



National Association of Residential Property Managers

S A N D I E G O C H A P T E R

**Learn the New Rules for Vacation Rentals (STVR)**



NARPM SAN DIEGO

**Learn the New Rules for Vacation Rentals (STVR)**

*Presented by*

**RORY REVIER**

WEDNESDAY

JUNE 15, 2022

If you rent your property or a portion of your property to a guest(s) on a short-term basis, you are subject to the San Diego Municipal Code requirements and must obtain a Transient Occupancy Registration Certificate.

Presented by Rory Revier

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks



Rory Revier  
Seabreeze Vacation Rentals



## WHEN

Wednesday  
June 15, 2022

## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

THANKS TO OUR MEETING SPONSOR



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#### MEETING LOCATION

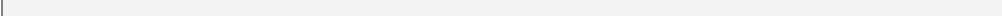




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SAN DIEGO CHAPTER**







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## NARPM San Diego Aug 2022 Meeting - Do You Have What It Takes To Have A BDM?

NARPM San Diego Chapter &lt;president@sdnarp.org&gt;

Mon 8/15/2022 10:54 AM

To: mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;

The poster is for a NARPM San Diego Chapter meeting. At the top is the NARPM logo, which consists of a stylized house icon with a blue roof and red walls, followed by the text 'NARPM™'. Below the logo is the text 'National Association of Residential Property Managers' and 'SAN DIEGO CHAPTER'. A red banner across the middle contains the text 'Do You Have What It Takes To Have A BDM?'. Below this banner is a large image of a woman, Drea Hespen, with blonde hair, resting her chin on her hand. To the left of the woman is a red line graph showing an upward trend. The text 'DO YOU HAVE WHAT IT TAKES TO HAVE A BDM?' is prominently displayed in the center. Below the woman's image is a dark blue box with the text 'WEDNESDAY, AUGUST 17, 2022'. At the bottom, there is a white box with 'SDNARPM.ORG', a dark blue box with '11:30AM - 1:30PM', and a white box with 'SPEAKER DREA HESPEN'. The NARPM logo is also present at the bottom left.

Join Drea Hespen as she brings to the table a bit of Sales Mastery.

Out of the 11 systems of Sales Mastery, we will be touching on these 3:

1. Lead Conversion System
2. Goal Setting and Measurement Systems
3. Personal Marketing Systems

We all wish there were an easy button to make life easier, but as we have all learned it takes hard work, blood, sweat, tears, and maybe some alcohol to hit your goals and if you want to be successful.

During our time together we will walk through the basics behind trusting the process at play and forecast your “just out of reach goal” in real time. We will break that somewhat scary and uncomfortable number together down into a science. You will be surprised at just how attainable your goals are when you break them down from a quarter, to a month, to a week, to the day. Once we have our goals set. It is important to have an idea of our sales identity. If you really want to expand, you have to first know yourself and show up in that authentic way to make sure that you are actually creating deals, not just working the deals coming in.



**Drea Hespen** has spent 5 years in the Property Management industry as a vendor. From maintenance automation, to utility concierge, to scale consulting - this time has allowed her to become familiar with the opportunities that are available in assisting all kinds of Property Management Companies in the success of their business. With this accrued knowledge, she has become a valuable resource to all PMCs on the vendor side.

As a Scale Consultant of **RentScale**, a South Florida-based consulting firm that helps residential property managers double their door count, she has gained ample insight into the value of a proven scalable sales process, Business Development Managers (BDMs), and the importance of consistent skill development, tools, and resources for BDMs.



#### WHEN

Wednesday

August 17, 2022

Deadline to Register Tues, Aug 16, 2022

#### WHERE

Banker's Hill Club

3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

REGISTER NOW

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

THANKS TO OUR MEETING SPONSOR



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Plenty of parking, large venue, sound system, views of downtown.

MEETING LOCATION





NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER





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## NARPM San Diego Meeting - Property Manager Round Table

NARPM San Diego Chapter <president@sdnarp.org>

Mon 9/19/2022 7:30 AM

To: mbraddon@hotmail.com <mbraddon@hotmail.com>



National Association of Residential Property Managers

S A N D I E G O C H A P T E R

### Property Manager Round Table



**Join Fellow Property Managers in Round Table Style Discussions! Various property management topics will be provided to every table for all to utilize, participate, share and discuss best practices.**

Roundtable discussions are great because they grant the opportunity for all attendees to learn from a group of peers. Instead of hearing one person speak, attendees get to swap information as a group!

No matter if you are new to property management or a veteran property manager, come prepared to learn something new that may change the way you do business or keep you out of trouble!





We'd like to hear from you! Let us know any topics or questions that you would like to discuss. Just email [THEBOARD@SDNARPM.ORG](mailto:THEBOARD@SDNARPM.ORG) and we'll add it to the topics.

## WHEN

Wednesday  
September 21, 2022

## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

Members \$20  
Non-Members/Guests \$40

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

## EVENT CONTACT

Michael Braddon  
[micahel@orionmrinc.com](mailto:micahel@orionmrinc.com)

THANK YOU TO OUR SPONSOR



If you haven't been to our new meeting location now is the time to come check it out!  
Plenty of parking, large venue, sound system, views of downtown.

MEETING LOCATION





**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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## NARPM San Diego Meeting - Property Managers and California Tax withholding

NARPM San Diego Chapter <president@sdnarpm.org>

Wed 11/9/2022 12:54 PM

To: mbraddon@hotmail.com <mbraddon@hotmail.com>



NARPM<sup>TM</sup>  
National Association of Residential Property Managers  
S A N D I E G O C H A P T E R

**Property Managers and California Tax Withholding**

NARPM SAN DIEGO

**PROPERTY MANAGERS AND CALIFORNIA TAX WITHHOLDING**

WEDNESDAY  
NOVEMBER 16, 2022  
11:30am - 1:30pm  
Banker's Hill Club



Liabile for your client's California income taxes and also sever penalties for not getting the proper FTB waiver on file. You may become liable for the amount that was required to be withheld and Property managers may also be liable for penalties and interest associated with their failure to withhold.

Know what you need to avoid these penalties!!



Presented by Sonia Caramazza

## WHEN

Wednesday

November 16, 2022

## WHERE

Banker's Hill Club

3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking

12:00 - 12:15 - Meeting Open & Chapter Updates

12:15 - 12:30 - Meeting Sponsor Speaks

12:30 - 1:30 - Spotlight Presenter Speaks

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MEETING LOCATION





**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**





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**FW: NARPM San Diego Holiday Party**

Michael Braddon &lt;mbraddon@hotmail.com&gt;

Fri 12/2/2022 11:46 AM

To: jason@redhousemgt.com &lt;jason@redhousemgt.com&gt;

FYI

Sent from [Mail](#) for Windows**From:** [NARPM San Diego Chapter](#)**Sent:** Monday, November 28, 2022 5:38 AM**To:** [mbraddon@hotmail.com](#)**Subject:** NARPM San Diego Holiday Party

National Association of Residential Property Managers

S A N D I E G O C H A P T E R

NARPM San Diego Holiday Party



Come celebrate an outstanding year at our Holiday Party and enjoy a good time with good food and good company.

**ENJOY AWARD-WINNING NEAPOLITAN PIZZA!**

Buona Forchetta provides their very own transportable pizza oven with a staff of pizzaioli and chefs. The catering service is provided by their golden pizza oven built on a 1971 Volkswagen Van which will be coming to your door and we will be making pizzas from scratch!



FREE to Members!

Non-Members/Guests \$40

**WHEN**

Wednesday

December 14, 2022

**WHERE**

Banker's Hill Club

3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

**AGENDA**

11:00 - Doors Open

11:30 - 1:30 Buffet & Drinks

1:30 - 2:00 Announcements / Open Floor

If you haven't been to our new meeting location now is the time to come check it out! Plenty of parking, large venue, sound system, views of downtown.

#### MEETING LOCATION







NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS



SAN DIEGO CHAPTER

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# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES February 3, 2022

### **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. Roll Call :**

Jason Riehl (Treasurer), Mark Scott (President), Amanda Gresiak (Secretary)  
and Julie Kern (Affiliate Chair)

### **2. Follow up on Upcoming Speakers:**

February - Steve Welty - Confirmed  
March - KTS  
April - Mark Cunningham - Confirmed  
May - Balcony / Insurance education

### **3. Ideas for future meeting topics:**

- CAL Fire did Q & A
- KTS
- Balcony issue – contractor to educate on the issue
- FTB in person for Withholding only
- Pam Strickland
- Short Term Rentals - Lisa Fore found a speaker

### **4. Treasurer (membership fees):**

Jason sent a reminder email to the membership reminding them of the fees.

### **5. Adjourned**





# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES & BOD ELECTIONS May 11, 2022

### **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. Roll Call :**

Jason Riehl (Treasurer), Mark Scott (President), Amanda Gresiak (Secretary), Julie Kern (Affiliate Chair), Michael Braddon (Proposed Interim President) and Lisa Fore (Past President)

### **2. Discuss and vote VA access to the website & collect information:**

Mark W Scott called for a vote; unanimous vote was yes.

### **3. Discuss and Vote for 2022-2023 Board of Directors: Interim President, Michael Braddon and keeping Jason Riehl as Treasurer , Mark Scott as Past President, Amanda Gresiak as Secretary:**

After discussion Mark Scott called for a vote, unanimous vote; **effective July 1, 2022**. Mark is now the immediate past President and Lisa will also stay on as a past President.

*NOTE: The complication with the COVID-19 pandemic has made finding new leadership complicated and sincere effort will be made to find qualified motivated new leadership for President, Treasurer and Secretary for the 2023-2024 BOD.*

### **4. Treasurer Report (Jason Riehl):**

Form 3500 reinstatement needed for being a non-profit organization; get us compliant with CA-FTB; Online postcard 199N will get us compliant (State SOI)

### **5. Board Communication and Upcoming Calls**

### **6. Adjourned**



# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES September 13, 2022

### **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. Roll Call :**

Jason Riehl (Treasurer), Amanda Gresiak (Secretary) , Michael Braddon (Interim President), Julie Kern (Affiliate Chair) and not in attendance: Mark Scott (Past President)

### **2. Further discussion about finding 2023-2024 New Board of Directors (BOD):**

Acknowledged due to COVID-19 Pandemic ...

Jason Riehl (Treasurer) has served 2018, 2019,2020,2021 and now 2022-2023

Amanda (Secretary) has also serviced Double Terms

NOTE: Several names were discussed as potential Secretary and President;  
the role of Treasurer is harder but we have a potential solution.

### **3. Follow up on Upcoming Speakers for 2023:**

January – Panel of Owner/Brokers: Mark W. Scott / Cheryl Chase-Berkson / Bob Davie

February – Tracey Merrell KTS

March – Round Tables

April – Pam Strickland - Confirmed

### **4. Plans for Holiday Party December 14th:**

Catered Party at the Banker's Hill Club. Michael called for vote: unanimous.

### **5. Board Communication and Upcoming Calls**

### **6. Adjourned**



# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES December 2, 2022

### **NARPM® ANTITRUST STATEMENT:**

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#### **1. Roll Call :**

Jason Riehl (Treasurer), Amanda Gresiak (Secretary) , Michael Braddon (Interim President), Julie Kern (Affiliate Chair) and not in attendance: Mark Scott (Past President)

#### **2. Further discussion about finding 2023-2024 New Board of Directors (BOD):**

Continued discussions for potential President, Secretary, and Treasurer.

**NOTE: Unanimous Vote for Daniel Brooks as New Membership Mentor !!!**

#### **3. Confirmed Upcoming Speakers for 2023:**

January – Panel of Owner/Brokers: Mark W. Scott / Cheryl Chase-Berkson / Bob Davie  
February – Tracey Merrell KTS  
March – Round Tables  
April – Pam Strickland - Confirmed

#### **4. Holiday Party December 14th:**

Confirmed catered by Buona Forchetta, 3001 Beech St, San Diego, CA 92102

#### **5. Board Communication and Upcoming Calls**

#### **6. Adjourned**

## Michael Braddon

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**From:** Michael Braddon  
**Official:** July 2022  
**Subject:** NARPM - San Diego Chapter New Officers July 2022 – June 2023

NARPM,

### **The new executive officers for July 2022 – June 2023:**

President –

Michael Braddon (Interim President)  
Orion Management & Realty, Inc.  
1210 28th Street  
San Diego, CA 92102-2206

President Elect – **TBD**

Secretary –

Gresiak, Amanda  
1014 W Washington St  
San Diego, CA 92103  
Bus: (619) 940-4638  
Email: [Amanda@amgprops.com](mailto:Amanda@amgprops.com)

Treasurer –

Jason Riehl  
444 S. Cedros Ave. Suite 250  
Solana Beach, CA 92075  
Bus: (858) 755-3031  
Email: [jason@redhousemgt.com](mailto:jason@redhousemgt.com)

Membership Mentor –

Danyel Brooks  
4455 Murphy Canyon Rd. #100-72  
San Diego, CA. 92123  
Bus: (858) 222-4663  
Email: [danyel@bpmsd.com](mailto:danyel@bpmsd.com)

Affiliate Chair – Julie Kern of Mr Rekey

## Rebecca Woodring

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**From:** Mark Scott <mscott@encorerealtysd.com>  
**Sent:** Thursday, March 30, 2023 5:29 PM  
**To:** Rebecca Woodring; michael@orionmrinc.com  
**Cc:** AJ Shepard; cyndi@evergreenpropertymgmt.com; Danyel Brooks; Christopher Cossitor; jason@redhousemgmt.com; amanda@amgprops.com  
**Subject:** RE: NARPM 2023 Chapter Compliance San Diego Chapter - Need Additional Info

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

Mark Scott will be president-elect.

Thank you,

Thank you,

Mark W. Scott  
Broker Associate

Encore Realty, Inc.  
5130 Bonita Road, Suite B  
Bonita, CA 91902  
DRE # 01197311



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**From:** Rebecca Woodring <rwoodring@managegroup.com>  
**Sent:** Thursday, March 30, 2023 2:22 PM  
**To:** michael@orionmrinc.com  
**Cc:** AJ Shepard <AJ@Uptownpm.com>; cyndi@evergreenpropertymgmt.com; Danyel Brooks <danyel@bpmsd.com>; Christopher Cossitor <flapsup@cossitorgroup.com>; jason@redhousemgmt.com; amanda@amgprops.com; Mark Scott <mscott@encorerealtysd.com>  
**Subject:** RE: NARPM 2023 Chapter Compliance San Diego Chapter - Need Additional Info

Thank you for the update Michael.

The position of President-Elect is required by the San Diego Chapter's Bylaws, Article IV, Section B. As you know, having this position filled ensures the Chapter has a named person to replace the President, in the event that the President is unable to serve or resigns the position.

Hope this helps!



# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES & BOD ELECTIONS May 11, 2022

### **NARPM® ANTITRUST STATEMENT:**

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#### **1. Roll Call :**

Jason Riehl (Treasurer), Mark Scott (President), Amanda Gresiak (Secretary), Julie Kern (Affiliate Chair), Michael Braddon (Proposed Interim President) and Lisa Fore (Past President)

#### **2. Discuss and vote VA access to the website & collect information:**

Mark W Scott called for a vote; unanimous vote was yes.

#### **3. Discuss and Vote for 2022-2023 Board of Directors: Interim President, Michael Braddon and keeping Jason Riehl as Treasurer , Mark Scott as Past President, Amanda Gresiak as Secretary:**

After discussion Mark Scott called for a vote, unanimous vote; **effective July 1, 2022**. Mark is now the immediate past President and Lisa will also stay on as a past President.

*NOTE: The complication with the COVID-19 pandemic has made finding new leadership complicated and sincere effort will be made to find qualified motivated new leadership for President, Treasurer and Secretary for the 2023-2024 BOD.*

#### **4. Treasurer Report (Jason Riehl):**

Form 3500 reinstatement needed for being a non-profit organization; get us compliant with CA-FTB; Online postcard 199N will get us compliant (State SOI)

#### **5. Board Communication and Upcoming Calls**

#### **6. Adjourned**