

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday January 5, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Andrea Caldwell (Certification/Education), Dave Kraszewski (Affiliate Chair), Robert Collins (Web-site Chair), Lisa Goodman (Social Media Chair)

Leadership Team absent: Bob Basso, Sandy Adams, Greg Goodman, Sarah Riqueros

Meeting called to order at 12:16 PM by President Sean McCarthy.

Approval of Minutes – December 2016 Minutes – tabled to February – minutes not present

Treasurer's Report (Brad Bonnifield)

- Paid members: 31 Free Members: 2 Staff Members: 2 Promo Members : 0
- New Members: 0 New Affiliates: 4
- Paid Affiliates: 20 Free non-profit Affiliates: 4
- Bank balance: \$27,913.48

Affiliate Report: (Dave Kraszewski)

- Updates – Richard Abdallah is 2016 Affiliate of the Year. All 2017 meetings have a aff sponsor

Membership (Sarah Riqueros) Absent, no report

- New Members
- New Affiliates

President's Notes:

- Website update – need to change primary contact info to new president
- Setting up mentoring program – Joi to create tri-fold for new prospective members
 - MOTION: \$25 for onboarding lunch
- Send out Cards.

Education:

- Classes scheduled for March 14 and tentatively August 16

Key-Speaker Schedule:

- January 19th: Sean Grady
- February 16th: Molly Current
- March 16th: Affiliate Meeting or Sam Liccardo
- April 20th: Pam Strickland
- May 18th: Affiliate Meeting or Sam Liccardo
- **June, August, October, Nov.: TBD**
- Friday July 21st: NARPM BBQ
- December: Christmas Party

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday February 2, 2017 – 12:00pm-1:30pm

MINUTES

Board Members: Sean McCarthy (President), John Adams (Past-President), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: Brad Bonnifield

Executive Committee / Leadership Team Members:

Andrea Caldwell (Certification/Education), Dave Kraszewski (Affiliate Chair), Robert Collins (Web-site Chair), (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee: Bob Basso, Sandy Adams, Greg Goodman Sarah Riqueros

Meeting called to order at 12:17 PM by President Sean McCarthy.

Approval of Minutes –

December 2016: Motion to approve, with correction to “Minutes (not agenda), 2nd, approved

January 2017: Motion to approve as written, 2nd, approved

Treasurer's Report (Brad Abbott):

- Paid members: 38 Free Members: 2 Staff Members: 2 Promo Members: 0
- New Members: 0 New Affiliates: 0
- Paid Affiliates: 26 Free non-profit Affiliates: 4
- Bank balance: \$34,237.79
 - Bank Signatories for 2017
 - President: Sean McCarthy
 - President Elect: Brad Bonnifield
 - Treasurer: Brad Abbott

Affiliate Report: (Dave Kraszewski)

- Dave will reach out to unpaid affiliates
- Affiliate meeting will be in April
- Bob Basso's finance presentation, on hold at this time
- All meetings in 2017 have sponsors
- Brad will ask Three Flames for our regular room for affiliate meeting
- MOTION: \$50 to Edible Arrangements to Rick Breshnahan, affiliate in the hospital

Membership (Sarah Riqueros) (Absent)

- New Affiliates
 - Lisa will send an email to encourage additional affiliate membership

President's Notes:

- Website update
 - Any updates needed
 - Sean had sent Rob photo and bio for website
- Setting up mentoring program
 - Reimburse up to \$25 for lunch or coffee
 - Board Member who will call new member and on what day:

- Andrea to reach out to Betto Poldis, and Kathryn Pelling
 - Sean to reach out to Chapin Hill
 - Lisa to speak to Louis Melo about his staff
 -
- Sendout Cards
 - Sean and Lisa to meet with Steve Hartman about this program

Education:

- What are the dates of the two classes:
 - Class attendance not yet enough
 - Suggest email reminder
- September class set – class teacher may not be speaker at meeting

Key-Speaker Schedule:

- February 16th: Molly Current
- March 16th: Affiliate Meeting
- April 20th: Pam Strickland
- May 18th: Sam Liccardo
- **June 15th: Bob Basso?**
- Friday July 21st: NARPM BBQ
- **August 17th: TBD- Possibly Larry Stone. Anyone know best way to reach him?**
- **September 21st: TBD**
- **October 19th: TBD**
- **November 16th: TBD**
- December: Christmas Party

RVP Tim Wehner will let us know when he can speak, but will only speak for 5 min

Respectfully submitted,

Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday March 2, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: Brad Bonnifield (President-Elect Adams (Past-President), Lisa Goodman (Vice President)

Executive Committee / Leadership Team Members present:

Andrea Caldwell (Certification/Education), Dave Kraszewski (Affiliate Chair), Greg Goodman (Fundraiser Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams, Robert Collins, Sarah Riqueros, Lisa Goodman

Meeting called to order at: 12:15 PM by President Sean McCarthy.

Approval of Minutes – March 2017 Minutes. MOTION to Approve as written, Motion 2nd, Motion Passed.

Treasurer's Report (Brad Abbott):

- Paid members: 44 Free Members: 2 Staff Members: 2, Promo: 2
- New Members: 0 New Affiliates: 2
- Paid Affiliates: 30 Free non-profit Affiliates: 4
- Bank balance: \$34,550.05_____

Affiliate Report: (Dave Kraszewski)

- Affiliate meeting – Panels all arranged, starter questions submitted

Membership (Sarah Riqueros) – Absent, no report

- New Members
 - Visitor Bowl – not yet possessed
 - Free Membership give away every meeting
 - Give away post card at meeting
- New Affiliates
 - To increase affiliate membership: tell vendors to join, put current and next speakers on newsletters.

President's Notes:

- Website update
 - Any updates needed: Sean submit photos and bio
- Sponsors – See page 2
- Setting up mentoring program
 - New Members: _____
 - Reimburse up to \$25 for lunch or coffee

- Board Member who will call new member and on what day:
 - Sean Contact Rob with A&M
 - Sean Chapin Hamphill
 - John David Robertson
- Bellizzi Tree Service: Do we have a formal process to notify them they can't use our logo?

Education:

- March Class Update
- September class Set?

Key-Speaker Schedule:

1. January 19th: Sean Grady with Members Insurance
2. February 16th: Molly Current
3. March 16th: Affiliate Meeting
 - Property managers offer gift card. 5 gift cards a \$25 each. Joi to purchase
 - Brad A. reserve larger room
4. April 20th: Pam Strickland
5. May 18th: Sam Liccardo
6. June 15th: Larry Stone
7. Friday July 21st: NARPM BBQ
- 8. August 17th: TBD**
- 9. September 21st: TBD**
- 10. October 19th: TBD**
- 11. November 16th: TBD**
12. December: Christmas Party

RVP Tim Wehner will let us know when he can speak, but will only speak for 5 min

Monthly Sponsors:

1. January: Signet Mortgage
2. February: Burch Boehner, State Farm
3. March: Affiliate Meeting
4. April: Dave Kraszewski, ServePro
5. May: Pirie Jensen, State Farm
6. June: Francesca Joyce, Gallaher and 1 HR Drain (Dave's notes say July)
7. July: NARPM BBQ
8. August: Marcia Shea, Legal Shield
9. September: Greg Goodman, Goodman Insurance
10. October: Bob, A Clean Gutter
11. November: Hany Louis, Tile and Grout King
12. December: Christmas Party

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday April 6, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members:

Andrea Caldwell (Certification/Education), Greg Goodman (Fundraiser Chair), Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee /Leadership Team Members Absent: Dave Kraszewski (Affiliate Chair), Bob Basso (Affiliate Coordinator), Sandy Adams (Legislative - State/National News Robert Collins(Website Chair)

Meeting called to order at 12:19 PM by President Sean McCarthy.

Approval of Minutes – March 2017 Minutes. Motion to correctly record absence of John Adams and Lisa Goodman. 2nd, motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 44 Free Members: 2 Staff Members: 2 Promo Members: 2
- New Members: 2 New Affiliates: 0
- Paid Affiliates: 34 Free non-profit Affiliates: 4
- Bank balance: 33,713.44

Affiliate Report: (Dave Kraszewski)

- BBQ Update: Greg Goodman – July 14, will put the sign up link in newsletter

Membership (Sarah Riqueros)

- New Members
 - Visitor Bowl – Who holds cards from visitors?
 - Free Membership give away every meeting
 - Email post card after meeting: Lisa
 - Put new members on newsletter
 - Are we checking that local members are National Members?
- New Affiliates
 - What can we do to increase affiliate membership?
 - Contact our vendors and tell them the benefits of joining
 - We can use send out cards to possibly attract new members
- Speakers will be advertised 2 months in advance
- Newsletter will have a section welcoming new members to chapter

President's Notes:

- Website update
 - Any updates needed: Sean submit photos and bio
 - Is there a way to welcome new members on our website?
- Sponsors – See page 3
- Setting up mentoring program
 - New Members: _____
 - Reimburse up to \$25 for lunch or coffee
 - Board Member who will call new member and on what day:
 - Sean Chapin Hamphill
 - John David Robertson
 - Andrea: Buto
 - Chris will work on on boarding
- Bellizzi Tree Service: Andrea, were they contacted

Education:

- March Class Update
 - Successes, and areas we could improve on
- September class set for the 12th
 - Finance
 - Have we started advertising the class

Key-Speaker Schedule:

1. April 20th: Pam Strickland
2. May 18th: Sam Liccardo
3. June 15th: Larry Stone
4. Friday July 14th: NARPM BBQ
5. August 17th: Sandy Adams
6. September 21st: Allison Disarro with Seacoast Commerce Bank: Banking Broker Trust Accounts
7. **October 19th: TBD**
8. **November 16th: TBD**
9. December: Christmas Party

Monthly Sponsors:

1. April: Chris Boucher, De Anza Almaden Appliance
2. May: Dave Kraszewski- Servepro of SW San Jose
3. June: Francesca Joyce, Gallaher and 1 HR Drain (Dave's notes say July)
4. July: NARPM BBQ
5. August: Marcia Shea, Legal Shield
6. September: Greg Goodman, Goodman Insurance
7. October: Bob, A Clean Gutter
8. November: Hany Louis, Tile and Grout King
9. December: Christmas Party

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday May 3, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members:

Andrea Caldwell (Certification/Education), Dave Kraszewski (Affiliate Chair), Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams, Greg Goodman, Robert Collins

Meeting called to order at 12:17 PM by President Sean McCarthy.

Approval of Minutes – April 2017 Minutes. Motion approval as written, Motion Seconded, Motion Passed.

Treasurer's Report (Brad Abbott):

- Paid members: 44 Free Members: 2 Staff Members: 2 Promo Members: 2
- New Members: 0 New Affiliates: 0
- Paid Affiliates: 35 Free non-profit Affiliates: 4
- Bank balance: \$35,424.99

Affiliate Report: (Dave Kraszewski)

- Updates – sponsorships to be \$150. All companies suggested to bring a raffle gift
- BBQ Update: Greg Goodman - Absent

Membership (Sarah Riqueros)

- New Members
 - Visitor Bowl – Start giving cards to Lisa
 - Free Membership give away every meeting
 - Email post card after meeting: Lisa
 - We will give away two free memberships each year

President's Notes:

- Discussion about maintenance videos – approximate cost \$175 per video or \$125 branded
- Sponsors – See page 3
- Setting up mentoring program
 - New Members:
 - Reimburse up to \$25 for lunch or coffee
 - Board Member who will call new member and on what day:
 - Sean Chapin Hamphill

- John David Robertson
- Andrea: Buto
- Greg did you get a chance to look into Reference USA for managers in the area?
- Bellizzi Tree Service:
 - Need to contact National to notify them that they are still using our logo

Education:

- September class set for the 12th
 - Finance class: Andrea will email information

Key-Speaker Schedule:

- May 18th: Sam Liccardo
- June 15th: Larry Stone
- Friday July 14th: NARPM BBQ
- August 17th: Sandy Adams
- September 21st: Allison Disarro with Seacoast Commerce Bank: Banking Broker Trust Accounts
- **Convention October 18th through 20th: have speaker on 26th?**
- **November 16th: TBD**
- December: Christmas Party

I need help with finding two more speakers.

- Possible speakers Kathleen Richard and Jean Storm

Monthly Sponsors:

- May: Dave Kraszewski- Servepro of SW San Jose
- June: Francesca Joyce, Gallaher and 1 HR Drain (Dave's notes say July)
- July: NARPM BBQ
- August: Marcia Shea, Legal Shield
- September: Greg Goodman, Goodman Insurance
- October: Bob, A Clean Gutter
- November: Hany Louis, Tile and Grout King
- December: Christmas Party

Alternate 1: Rich Abdalah, Abdalah Law

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday June 1, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members present: Andrea Caldwell (Certification/Education), Dave Kraszewski (Affiliate Chair), Greg Goodman (Fundraiser Chair), Robert Collins (Web-site Chair), Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams

Meeting called to order at 12:18 PM by President Sean McCarthy.

Approval of Minutes – May 2017 Minutes. Motioned approval as written, motion Seconded, Motion carried

Treasurer's Report (Brad Abbott):

- Paid members: 45 Free Members: 2 Staff Members: 2 Promo Members: 2
- New Members: 0 New Affiliates: 1
- Paid Affiliates: 36 Free non-profit Affiliates: 4
- Bank balance: \$36,052.04

Affiliate Report: (Dave Kraszewski)

- BBQ Update: Greg Goodman – 2 possible affiliates, 1 sponsorship available
 - \$150 sponsor,
 - Every company bring a \$50 raffle prize – optional and on invitation

Membership (Sarah Riqueros)

- New Members
 - Visitor Bowl – Lisa is receiving cards
 - Free Membership give away every meeting
 - Email post card after meeting: Lisa
 - We will give away two free memberships each year
- New Affiliates
 - What can we do to increase affiliate membership?
 - Contact our vendors and tell them the benefits of joining
 - We can use send out cards to possibly attract new members
- Newsletter will welcome new members to chapter, Sarah will feature new affiliates

President's Notes:

- Website update
- Website notes from last month: Lots of work for Rob, he's willing to train next web chair

- All updates completed in the next 2-3 weeks
- Is there a way to welcome new members on our website?
- Sean submit photos and bio
- Joi to update website calendar with National and Local information
- Setting up mentoring program
 - New Members: _____
 - Reimburse up to \$25 for lunch or coffee
 - Board Member who will call new member and on what day:
- We spoke about the maintenance videos:
 - \$170 video with branding
 - \$125 for regular video
 - Free with no branding
 - This could be a benefit to our members.

Education:

- Finance class on September 12th by Vicki
 - Andrea Caldwell will work with RVP Tim to advertise via blast email

Key-Speaker Schedule:

- June 15th: Larry Stone
- Friday July 14th: NARPM BBQ
- August 17th: Sandy Adams
- September 21st: Allison Disarro with Seacoast Commerce Bank: Banking Broker Trust Accounts
- **Convention October 18th through 20th: have speaker on 26th?**
- **November 16th: TBD**
- December: Christmas Party

I need help with finding two more speakers.

- Possible speakers Kathleen Richard and Jean Storm

Monthly Sponsors:

- **June: Francesca Joyce, Gallaher and 1 HR Drain**
- July: NARPM BBQ
- August: Marcia Shea, Legal Shield
- September: Greg Goodman, Goodman Insurance
- October: Bob, A Clean Gutter
- November: Hany Louis, Tile and Grout King
- December: Christmas Party

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday July 6, 2017 – 12:00pm-1:30pm
At the Caldwell Ranch

MINUTES

Board Members present: Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), and Chris Cossitor (Director at Large)

Board Members Absent: Sean McCarthy (President), John Adams (Past-President)

Leadership Team Members present:

Andrea Caldwell (Certification/Education), Greg Goodman (Fundraiser Chair), Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee /Leadership Team Members Absent: Dave Kraszewski, Bob Basso, Sandy Adams, Robert Collins

Meeting called to order at 12:40 PM by President-Elect Brad Bonnifield.

Approval of Minutes – June 2017 Minutes. Motion to approve as written, Motion 2nd, Motion carried

Treasurer's Report (Brad Abbott):

- Paid members: 46 Free Members: 2 Staff Members: 2 Promo Members: 2
- New Members: 1 New Affiliates: 1
- Paid Affiliates: 37 Free non-profit Affiliates: 4
- Bank balance: 36,374.82

Affiliate Report: (Dave Kraszewski) – Dave absent, Greg Goodman Reporting

- Affiliate chair Dave Kraszewski has moved out of CA, Greg Goodman was nominated by Joi Walker to become the new affiliate chair, Lisa Goodman 2nd the motion, Motion carried
- New affiliates
 - EZ Bathtub Re-glazing
 - Cuinn: American HVAC
- BBQ Update: Greg Goodman
 - \$150 sponsorships and a \$50 prize per game will be given
 - Every company bring a \$50 raffle prize will be suggested but is Optional

Membership (Lisa Goodman)

- New Members
 - Visitor Bowl – Lisa is receiving cards
 - Free Membership give away every meeting
 - Email post card after meeting: Lisa
 - Will give away 10 free memberships each year. We have currently given out 2
- New Affiliates

- What can we do to increase affiliate membership?
 - Contact our vendors and tell them the benefits of joining
 - We have been using Send Out cards to visitors to possibly attract new affiliates
- Newsletter will have a section welcoming new members to chapter

President's Notes:

- Website update – Rob & Chris will work on, consider new provider
- Website notes from May: Lots of work for Rob, Possible monthly charges, reason for changing to new website was because there were lots of issues with national. **Are these issues now resolved?**
- Website notes from June: Rob post google calendar log in on Dropbox
 - Joi will update google calendar
 - Sean submit photos and bio
- Setting up mentoring program
- John spoke about the maintenance videos in our May meeting:
 - \$170 video with branding, \$125 for regular video
 - This arose as a possible member benefit

Education:

- September Finance class set for the 12th
 - Have we started advertising the class
 - When will we start asking members to sign up?
 - Cost?

Key-Speaker Schedule:

- Friday July 14th: NARPM BBQ
- August 17th: Sandy Adams
- September 21st: Allison Disarro, Seacoast Commerce Bank: Banking Broker Trust Accounts
- **Convention October 18th through 20th: Need speaker on 26th?**
- November 16th: Brian Chong, CPA: Premier Tax Advisors
- December: Christmas Party

Monthly Sponsors:

- July: NARPM BBQ
- August: Marcia Shea, Legal Shield
- September: Greg Goodman, Goodman Insurance
- October: Bob, A Clean Gutter
- November: Hany Louis, Tile and Grout King
- December: Christmas Party

Meeting Adjourned: 1:53 PM

Respectfully Submitted, Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday August 3, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Andrea Caldwell (Certification/Education), Greg Goodman (Affiliate Chair), Robert Collins (Web-site Chair), Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams

Meeting called to order at 12:10 PM by President Sean McCarthy.

Approval of Minutes – July 2017 Minutes MOTION to Approve as written, 2nd motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 46 Free Members: 2 Staff Members: 2 Promo Members: 2
- New Members: 0 New Affiliates: 1
- Paid Affiliates: 38 Free non-profit Affiliates: 4
- Bank balance: \$37,145.94

Affiliate Report: (Greg Goodman)

- Greg Goodman is the new affiliate chair
- New members
 - EZ Bathtub Re-glazing
 - Cuinn: American HVAC
- BBQ Update: Greg Goodman – all had excellent time. Activities under used \$2836 Gross profit

Membership (Lisa Goodman)

- New Members
 - Visitor Bowl – Lisa is receiving cards
 - Free Membership give away every meeting
 - Email post card after meeting: Lisa
 - We will give away 10 free memberships each year. We have currently given out two.
- New Affiliates
 - What can we do to increase affiliate membership?
 - Contact our vendors and tell them the benefits of joining
 - Using Send Out cards to possibly attract new affiliates
 - Newsletter will have a section welcoming new members to chapter

President's Notes:

- Website notes from another provider could cost \$120. Worth changing to lessen work of volunteers.
- **Website notes from June: Rob post google calendar log in on Dropbox**
 - Joi will update google calendar
 - Any updates needed: _____
 - Is there a way to welcome new members on our website?
 - Have we set this up?
- Setting up mentoring program
 - New Members: _____
 - Reimburse up to \$25 for lunch or coffee
 - Board Member who will call new member and on what day:

Education:

- September class set for the 12th
 - Finance
 - Have we started advertising the class
 - When will we start asking members to sign up?
 - Cost?

Key-Speaker Schedule:

- August 17th: Sandy Adams
- September 21st: Allison Disarro with Seacoast Commerce Bank: Banking Broker Trust Accounts
- **Convention October 18th through 20th: Need speaker on 26th?**
- November 16th: Brian Chong, CPA: Premier Tax Advisors
- December: Christmas Party

I need help with finding one more speaker.

- Possible speakers Kathleen Richard and Jean Storm

Monthly Sponsors:

- August: Marcia Shea, Legal Shield
- September: Greg Goodman, Goodman Insurance
- October: Bob, A Clean Gutter
- November: Hany Louis, Tile and Grout King
- December: Christmas Party

Alternate 1: Rich Abdalah, Abdalah Law

Meeting Adjourned at 1:10 PM

Respectfully Submitted,
Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday September 7, 2017 – 6:00 PM-9:30 PM

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Andrea Caldwell (Certification/Education), Greg Goodman (Affiliate Chair), , Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee Members absent: Robert Collins, Bob Basso, Sandy Adams

Members present: Melissa Riqueros

Meeting called to order at 12:10 PM by President Sean McCarthy.

Approval of Minutes – August 2017 Minutes MOTION to Approve with correction of Date of meeting and “Minutes” vs. “Agenda” Made, 2nd motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 49 Free Members: 2 Staff Members: 2 Promo Members: 3
- New Members: 2 New Affiliates: 1
- Paid Affiliates: 41 Free non-profit Affiliates: 4
- Bank balance: \$35,059.66?

Affiliate Report: (Greg Goodman)

- Greg Goodman is the new affiliate chair

Membership (Lisa Goodman)

- New Members
 - Visitor Bowl – Lisa is receiving business cards and mailing cards
 - We will give away 10 free memberships each year. We have currently given out two.
 - Consider an ad in the SCCAOR or Silver Newsletters
- New Affiliates
 - Better Credit Services USA
 - What can we do to increase affiliate membership?
 - Contact our vendors and tell them the benefits of joining
 - Using Send Out cards to possibly attract new affiliates
 - Newsletter will have a section welcoming new members to chapter

President's Notes:

- Website notes from another provider could cost \$120. Worth changing to lessen work of volunteers.

- Website notes from June: Rob post google calendar log in on Dropbox
 - Joi will update google calendar
 - Any updates needed: _____
 - Is there a way to welcome new members on our website?
 - Have we set this up?
- Setting up mentoring program
 - New Members:
 - Reimburse up to \$25 for lunch or coffee
 - Board Member who will call new member and on what day:

Education:

- September Finance class set for the 12th
 - Finance

Key-Speaker Schedule:

- September 21st: Allison Disarro with Seacoast Commerce Bank: Banking Broker Trust Accounts
- **Convention October 18th through 20th: Need speaker on 26th?**
- November 16th: Brian Chong, CPA: Premier Tax Advisors
- December: Christmas Party

I need help with finding one more speaker.

- Possible speakers Kathleen Richard and Jean Storm

Monthly Sponsors:

- September: Greg Goodman, Goodman Insurance
- October: Bob, A Clean Gutter
- November: Hany Louis, Tile and Grout King
- December: Christmas Party

Alternate 1: Rich Abdalah, Abdalah Law

Meeting Adjourned 7:54 PM

Respectfully submitted,
Joi Walker, Aborn Properties

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday October 5, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Lisa Goodman (Vice President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Andrea Caldwell (Certification/Education), Greg Goodman (Affiliate Chair) Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Robert Collins, Sandy Adams

Meeting called to order at 12:15 PM by President Sean McCarthy.

Approval of Minutes – September 2017 Minutes. Motioned approval as written, seconded, motion carried. Will table approval of September planning minutes to next meeting, as they were not at meeting

Treasurer's Report (Brad Abbott):

- Paid members: 50 Free Members: 2 Staff Members: 2 Promo Members: 4
- New Members: 1 New Affiliates: 2
- Paid Affiliates: 43 Free non-profit Affiliates: 4
- Bank balance: \$33,810.89
- MOTION to APPROVE BUDGET: Motion made, seconded and approved

Affiliate Report: (Greg Goodman)

- MOTION: Approve of Holiday party prices - \$50 for first person from each company, \$25 for all others. Suggested holiday raffle gift per company. Motion made, seconded and approved
- Christmas Party – committee meeting next week

Membership (Lisa Goodman)

- New Members
 - Are we tracking Send Out Cards
- MOTION: Offer free annual dues to any member for affiliate who refers 3 or more Property Manager members in a 12 month period to our chapter. Motion made, seconded and approved
- Newsletter will have a section welcoming new members to chapter
- 2 minutes of meeting time will go to new affiliates to introduce themselves to chapter

President's Notes:

- Website update – will transfer to paid service to minimize long hours to volunteers
 - **Joi will update google calendar**
- Sponsors – See page 3
- Setting up mentoring program

Education:

- Done for this year.
- Next Class scheduled for February 13, 2018

Key-Speaker Schedule:

- **Convention October 18th through 20th**
 - **Lisa's fun idea**
- November 16th: Brian Chong, CPA: Premier Tax Advisors
- December: Christmas Party

Monthly Sponsors:

- October: Bob, A Clean Gutter
- November: Hany Louis, Tile and Grout King
- December: Christmas Party

Alternate 1: Rich Abdalah, Abdalah Law

- Designation Packet Deadline – If a member wishes to be recognized at the Convention in October 2017, the deadline to upload their packet is this Friday, August 4.
- Darryl Kazen Memorial Scholarship – The deadline to apply is this Friday, August 4th. Here is the link for details: <https://www.narpm.org/education/designations-and-certifications/darryl-kazen-memorial-scholarship/>
- Leadership Training is November 13 & 14 in St. Louis. The current President Elect for your chapter is expected to attend as well as Ambassadors for 2018. Others can attend by paying the 175 fee.

Meeting adjourned at 1:27 PM

Respectfully submitted,
Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS MEETING
Thursday November 2, 2017 – 12:00pm-1:30pm

MINUTES

Board Members present: Sean McCarthy (President), John Adams (Past-President), Brad Bonnifield (President-Elect), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: Lisa Goodman

Executive Committee / Leadership Team Members present: Andrea Caldwell, Greg Goodman, Sarah Riqueros

Leadership Team Members Absent: Bob Basso, Sandy Adams, Robert Collins, Lisa Goodman

Meeting called to order at 12:16 PM by President Sean McCarthy.

Approval of Minutes –

- October 2017. Motioned approval as written, 2nd, motion carried.
- September planning: Motioned approved with changes to two job titles on Leadership team. 2nd, motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 50 Free Members: 2 Staff Members: 2 Promo Members: 4
- New Members: 0 New Affiliates: 2
- Paid Affiliates: 45 Free non-profit Affiliates: 4
- Bank balance: \$33,103.71

Affiliate Report: (Greg Goodman)

- Christmas Party Updates
 - MOTION: Sponsors receive one free ticket a \$50 value and all guests are \$25. Motion made, 2nd and approved
- Joi, Sarah, Brad, Greg, Chris

Membership (Lisa Goodman)

- New Members/ Affiliates
 - Anyone who joins as a PM or affiliate gets a year free membership
 - MOTION: Member or affiliate who refers two property managers in a 12 month period receive free annual membership, PMs or affiliates are eligible to refer. Motion made, 2nd and approved
- Newsletter will have a section welcoming new members to chapter
 - Did we start doing this?

President's Notes:

- Website update
- Rob post google calendar log in on Dropbox, Joi has updated calendar

- Rob will work with 4 ½ to update. Will pay 4 ½ to start maintaining at \$200/ month
 - Is there a way to welcome new members on our website?
- Setting up mentoring program
 - New Members: _____
 - Reimburse up to \$25 for lunch or coffee
 - What can we do to improve this process?
 - Do new members feel welcome?
 - Do new members see values in our chapter?
 - We should call new members and ask them about their experience so far
 - Sean to make calls....
- Send Out Cards – Lisa (not present, no update)

Miscellaneous:

- Discussion of splitting into two monthly newsletters, one for the meeting content and one for news
- Discussion about which speakers were coming in January to a panel discussion

Education:

- Done

Key-Speaker Schedule:

- November 16th: Brian Chong, CPA: Premier Tax Advisors
- December: Christmas Party

Monthly Sponsors:

- November: Hany Louis, Tile and Grout King
- December: Christmas Party

Alternate 1: Rich Abdalah, Abdalah Law

Meeting adjourned at 1:33 PM

Respectfully submitted,
Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER BOARD of DIRECTORS MEETING

Thursday December 7, 2017 – 12:00pm-1:30pm

MINUTES

Board Members Present: Sean McCarthy (President), John Adams (Past-President), Joi Walker (Secretary), Brad Abbott (Treasurer), Chris Cossitor (Director at Large)

Board Members Absent: Brad Bonnifield (President-Elect), Lisa Goodman (Director at Large)

Executive Committee / Leadership Team Members Present: Greg Goodman (Affiliate & Fundraiser Chair), Sarah Riqueros (Membership/ Communication Chair), Lisa Goodman (Social Media Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso (Affiliate Coordinator), Sandy Adams Andrea Caldwell (Certification/Education), (Legislative - State/National News), Robert Collins (Web-site Chair)

Meeting called to order at 12:20 PM by President Sean McCarthy.

Approval of Minutes – November 2017 Minutes. Minutes Motioned approval as written, 2nd, motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 50 Free Members: 2 Staff Members: 2 Promo Members: 4
- New Members: 1 New Affiliates: 2
- Paid Affiliates: 47 Free non-profit Affiliates: 4
- Bank balance: \$32, 792.42

Affiliate Report: (Affiliate Chair)

- Christmas Party Committee
 - Joi, Sarah, Brad, Greg, Chris
- Sponsors get 1 free admission, tracked by Brad A on sign in sheet
- 84 people How many people signed up. All sponsors paid.
- Joi will ask Rob to MC and run auction. Sean to observe moment of silence for Jana Segal
- Brad to have different color tickets for raffle and auction

Membership (Lisa Goodman) – absent, no report

- New Members/ Affiliates
 - 2 referrals equal free dues in 12 month period
 - Member who refers someone who joins gets a free membership
 - Applies to both PM and affiliates
 - Affiliates get free membership for bringing new PM's, not Affiliates
- Newsletter will have a section welcoming new members to chapter

President's Notes:

- Website update - 4 ½ to start maintaining at \$119/month starting in December
- Google Calendar updated by Joi
 - Is there a way to welcome new members on our website?
 - Have we set this up?

- Setting up mentoring program
 - New Members: _____
 - Reimburse up to \$25 for lunch or coffee
 - What can we do to improve this process?
 - Do new members feel welcome?
 - Do new members see values in our chapter?
 - We should call new members and ask them about their experience so far
 - Sean to make calls....

Education:

- Done for the year. Next class Feb. 13, 2018

Key-Speaker Schedule:

- December: Christmas Party

Monthly Sponsors:

- December: Christmas Party

Meeting adjourned at 12:55 PM

Respectfully submitted,
Joi Walker, Secretary



Session expires in 19:51

199N e-Postcard - Confirmation

Print this page for your records. The Confirmation Number below is proof that you successfully filed your e-Postcard.

We received your FTB 199N California e-Postcard on February 02, 2018 10:53 AM.

Confirmation Number:

205933203306

Entity Information

Entity ID:

2059332

Entity Name:

THE SANTA CLARA COUNTY CHAPTER OF NARPM

Account Period Beginning:

JANUARY 01, 2017

Account Period Ending:

DECEMBER 31, 2017

This is not your entity's first year in business.

Your entity has not terminated or gone out of business.

Your entity has not changed the account period.

Gross Receipts:

\$61,196

This is not an amended return.

An IRS Form 1023/1024 is not pending.

Date IRS Form 1023/1024 Filed:

N/A

FEIN:

770342116

Doing Business As:

Website Address:

Entity's Mailing Address

1190 S BASCOM AVE SUITE 108
BRAD BONNIFIELD
SAN JOSE, CA 95128

Principal Officer's Information

Name: BRAD BONNIFIELD
1190 S BASCOM AVE SUITE 108
BRAD BONNIFIELD
SAN JOSE, CA 95128

Contact Information

Name: DYANN M SHEPARD

Phone: 805.466.0947

[Print](#)

[Log Out](#)

After we process your 199N e-Postcard, you may receive a bill if the three year gross receipt average is greater than the amount allowed for filing a 199N e-Postcard.



Manage Form 990-N (e-Postcard)

[Home](#) | [Security Profile](#) | [Logout](#)

EIN	Organization Name	Tax Year	End Date	Created On	Status	Submission ID	Action
77-0342116	THE SANTA CLARA CHAPTER OF NARPM	2017	12-31-2017	02-02-2018	Accepted	<u>10065520180331696402</u>	

[««« Prev](#) Page 3 [Next »»»](#)

CREATE NEW FILING



Confirmation

[Home](#) | [Security Profile](#) | [Logout](#)

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

- **Organization Name:** THE SANTA CLARA CHAPTER OF NARPM
- **EIN:** 770342116
- **Tax Year:** 2017
- **Tax Year Start Date:** 01-01-2017
- **Tax Year End Date:** 12-31-2017
- **Submission ID:** 10065520180331696402
- **Filing Status Date:** 02-02-2018
- **Filing Status:** Pending

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



Contact Information

[Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile

Select EIN

Organization Details

Contact Information

Confirmation

Electronic Notice-Form 990-N (e-Postcard)

Organization Address and Principal Officer Information

Organization's legal name: **THE SANTA CLARA CHAPTER OF NARPM**

If your organization conducts business using another name (DBA), enter other name:

* = required field

Organization:

DBA Name

DBA Name - continued

ENTER ADDITIONAL DBA NAMES

Country*

US - United States

Number and Street (or PO Box)*

1190 S BASCOM AVE SUITE 108

City or Town*

SAN JOSE

State*

CA - California

Zip Code*

95128

Organization's website address, if applicable

Principal Officer:

Type of Name*

Person

Person Name*

BRAD BONNIFIELD

Country*

US - United States

Number and Street (or PO Box)*

1190 S BASCOM AVE SUITE 108

City or Town*

SAN JOSE

State*

CA - California

Zip Code*

95128

[PREVIOUS](#)

[CANCEL FILING](#)

[SAVE FILING](#)

[SUBMIT FILING](#)



National Association of Residential Property Managers

Santa Clara County Chapter Leadership

Chapter Leadership

President:	Brad Bonnifield – brad@cornerstonepm.net
President-Elect:	Sarah Riqueros – sarah@almaden4rent.com
Secretary:	Joi Walker - joi@abornproperties.com
Treasurer:	Brad Abbott – Brad@presidentialpm.com
Director at Large:	Chris Cossitor – flapsup@cossitorgroup.com
Director at Large:	Lisa Goodman – Lisa@silvercreekvalleyproperties.com
Past President:	Sean McCarthy - sean@goldenstatepropertymanagement.com
Educational Coordinator:	Andrea Caldwell - agetto@aol.com
Membership Coordinator:	Chris Cossitor / Lisa Goodman
Legislative Coordinator:	Sandy Adams – Sandy@rentalhousingnetwork.com
Affiliate Co-Chair/Program Coordinator:	Greg Goodman – ggoodman1@farmersagent.com
Marketing/Publications:	Sarah Riqueros - sarah@almaden4rent.com
Affiliate Co-Chair:	Bob Basso – bassorjp@aol.com
Education/Designation Chair:	Andrea Caldwell – agetto@aol.com
Website Chair:	Robert Collins - robert@cw-hms.com

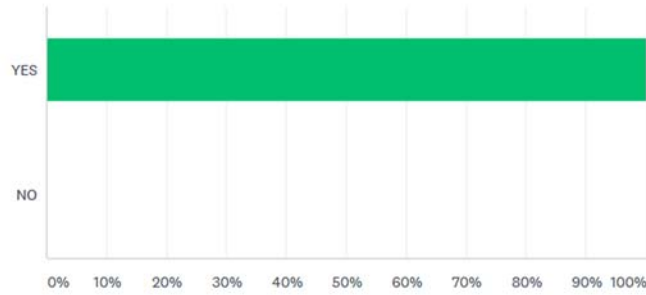
Q1

Customize

Export ▼

I approve of the Board of Directors and leadership Committee as presented below.

Answered: 13 Skipped: 0



ANSWER CHOICES ▼	RESPONSES ▼
▼ YES	100.00% 13
▼ NO	0.00% 0
Total Respondents: 13	



Brad Bonnifield <brad@cornerstonepm.net>

NARPMSCC- 2018 Election of Incoming Officers and Directors

1 message

narpmssc.social@gmail.com via surveymonkey.com <member@surveymonkeyuser.com> Fri, Nov 3, 2017 at 9:41 AM

Reply-To: narpmssc.social@gmail.com

To: "Bonnifield, Brad Cornerstone Property Management" <brad@cornerstonepm.net>

NARPM SCC-2018 Leadership election

Cast your vote...Click the button below to start the survey. Thank you for your participation!

Begin Survey

Please do not forward this email as its survey link is unique to you.

[Unsubscribe](#) from this list

Powered by  SurveyMonkey®

NARPM Santa Clara County Budget for 2017

		Notes
Income:		
Member Dues - Annual	7,140	51 members @ \$140 each (Based on 2016 Roster)
Affiliate Dues - Annual	10,915	37 affiliates @ \$295 each (Based on 2016 Roster)
50/50 Drawing	2,000	Estimate from 2015 income
Education	1,305	2015 Class income
Annual Fundraiser Event	2,500	100 Guests at \$25
Holiday Party	6,550	\$4,950 - 90 guests @ \$55, \$500 Special Raffle (iPad mini), \$750 for 50/50 Raffle, \$350 Photo Booth Sponsor
Grants from NARPM National	2,130	\$630 Member Retention, \$500 Advertising Grant (Available), \$500 Education Grant, Speaker Travel Grant \$500
Total Income	\$ 32,540.00	
Expense:		
50/50 Drawing	1,000	1/2 of estimated income
Advertising	604	\$204 (\$17 per month) MailChimp, \$400 flyers & misc costs, Mailings/Flyers/Invoices
Awards/Scholarships	200	4 \$50 Amex Gift Cards for 1 Affiliate Meeting
Bank Charges		Bank account is free
Board of Directors	3,600	\$2,000 - Pres. & Pres Elect Sponsorship to attend Natl Conv @ \$1,000 each; \$200 gift for Holiday Party for outgoing President, \$500 BOD Dinner, \$800 End of Year BoD gifts, \$100 President Budget
Catering/Room Rental	6,960	\$696 average per meeting x 10 meetings, \$300 Adobe Lodge Fee
Conventions	500	\$500 Donation to NARPM National Past Presidents Golf Tourney
Donations	1,700	\$1,200 Annual Fundraiser Donation, \$500 Family Giving Tree
Education	1,412	2015 Education Expenses
Free Memberships	1,695	Free local memberships for first 10 sign ups @ \$140 each, Free Membership for Affiliate of the Year \$295
Fundraiser Annual Expense	1,500	\$1,000 Food, \$250 Drinks, \$250 Other/Decorations/Etc
Holiday Party Expense	7,686	\$2170 Casino; 90 dinners @ \$41=\$3690; \$300 tips (10 tips of \$30); Raffle Giveaway (iPad mini) \$400; \$375 for 50/50 Raffle; \$651.41 Photo Booth; \$100 decorations
Merchant Fees	444	Paypal, Square, Etc. (Estimate Based on 2015 expense)
Professional - Legal/Acctng	175	Tax Return Preparation + Tax
Professional - Speakers	1,400	2 speakers @ \$250 each + \$50 Gift Card Per Meeting @ 8 Meetings, \$500 Out-of-Town Speaker Travel Expense
Scholarship	1,950	\$150 Designation Reimbursements (estimated 3), \$1500 Leadership Training
Supplies	800	Plaques, gift cards for convention giveaways, other misc.
Tradeshow	700	Tradeshow Expense
Website	130	Website Hosting Expense
Total Expense	\$32,456.41	
Net Income	\$83.59	
Changes to budget:		
Topics:		



Brad Bonnifield <brad@cornerstonepm.net>

NARPM Santa Clara County - Thursday , January 19th - MARK YOUR CALENDAR!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: brad@cornerstonepm.net

Tue, Jan 10, 2017 at 12:09 PM

NARPM Santa Clara County - Meeting Reminder

[View this email in your browser](#)

NARPM **HELPING YOUR PROPERTY MANAGEMENT BUSINESS GROW...**

NARPM = National Association of Residential Property Managers

AGENDA

- NETWORKING
- EDUCATION
- ADVOCACY (LEGISLATION)
- PROFESSIONALISM

Thursday, January 19th, 8:15am-10am, Three Flames Restaurant in San Jose

ADD THIS EVENT TO YOUR CALENDAR!

SPEAKER OF THE MONTH

[TOPIC: E&O Insurance](#)

Brief Bio: Sean Grady serves as VP of Sales for the Western Region at Member Insurance Agency, Inc. He has 11 years



SEAN GRADY

Members Insurance

VP of Sales

847-277-2628



BREAKFAST MEETING COSTS:

First Time Guests Are FREE!

Members: FREE with membership

Affiliates: FREE with membership

Returning Non-Members: \$20@door

WHERE WE MEET:

Three Flames

1547 Meridian Ave, San Jose, CA
95125

WHEN WE MEET:

Every Third Thursday of the Month
from 8:15am to 10am

of sales and insurance expertise. Most recently, he served as Regional VP at TIB Insurance Brokers, Inc. Prior to TIB Insurance Brokers, Inc., he served as an Account Executive at Member Insurance and was a top sales performer during his tenure.

SPONSOR OF THE MONTH



CLAY SELLAND

Signet Mortgage

925-807-1500

clay@signetmortgage.com



Congrats to Our
Affiliate of the
Year for 2016!
Mr. Richard
Abdallah !

OUR NEW WEBSITE

JOIN

LIKE US ON FACEBOOK



BROKER OWNER RETREAT

****Tradeshow Included! Learn,
Build, and Enhance Relationships!**

When: March 20-22nd

Where: The Mirage Hotel, Las Vegas! Click [HERE](#) for Special NARPM Pricing!

Click [HERE](#) for more info.!

OUR AFFILIATE MEMBERS

Interested in becoming an Affiliate?

Click [HERE](#) to learn more!

WHAT YOU MISSED AT THE HOLIDAY PARTY!



See all the fun photos [HERE](#)!

Special thanks to our Photo Booth sponsors, [Gallaher, Co.](#) and [1-Hour Drain!](#)



Proceeds went to Sunday Friends!
Click [HERE](#) for more information about this amazing non-profit charity!



CALNARPM CONFERENCE AND TRADESHOW

****Learn from the top minds in the industry!**

When: April 12th-14th

Where: Napa Valley Marriot Hotel!

Click [HERE](#) for more info.!



LEGISLATIVE UPDATE

STATE: On and after July 1, 2017, a landlord shall provide a written notice to the prospective tenant about bed bug identification, behavior and biology, the importance of cooperation for prevention and treatment, and the importance of and for prompt written reporting of suspected infestations to the landlord.

EDUCATION / DESIGNATIONS

Don't have a designation yet? It's time to get one!

This year we have two classes being taught at our chapter:

[NARPM®/IREM®](#) and [Finance](#)

Dates to follow!

Achieving your designation from NARPM® is good for your business and sets you apart from your competitors. You will not only build your business through referrals, you will develop new skills that help maintain your current client base. Apply for your designation today by clicking [HERE](#).



Read the latest [Residential Resource Magazine](#) Articles from NARPM National!



For more updates like this one, visit
RentalHousingNetwork.com.



Thank you to
our Legislative
Chair, Sandy
Adams with
Rental Housing
Network!

SAVE THE DATE
NEXT MEETING IS
THURSDAY, FEBRUARY
16TH WITH MOLLY
CURRENT!



MOLLY CURRENT

Project Sentinel
Director of Fair Housing
[650-321-6291 x8101](tel:650-321-6291)
mcurrent@fairhousing.org

2017 - I Shall Slay!

Congrats to our very own
Membership Chair, Sarah Campbell,
and her Family, Matt and Levi, for
welcoming Baby Logan into the
world! Congrats to Grandma
Melissa, and Grandpa Rod Riqueros
too!

DID YOU KNOW...

You can ask questions to NARPM
Members Nationwide!

Click [HERE](#) to join the NARPM
Business Leader GOOGLE Group.

Add yourself to this group to see
how others have handled situations,
to avoid pitfalls, and to get insight
and support! If you're not a part of
this groups, you're missing a great
resource that NARPM provides to all
members!



Your 2017
President, Sean
McCarthy, with
Golden State
Property
Management!

The Board of Directors and Leadership
Team meet every 1st Thursday of the
month at [The Adobe Lodge](#) in Santa
Clara from 12pm-1:30pm. Everyone is
welcome to come share their ideas!
(Lunch not included) Please RSVP via
e-mail to our NARPM SCC President at
least 24 hours in advance.



Brad Bonnifield <brad@cornerstonepm.net>

NARPM Santa Clara County - Thursday , February 16th - MARK YOUR CALENDAR!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: brad@cornerstonepm.net

Fri, Feb 10, 2017 at 1:27 PM

NARPM Santa Clara County - Meeting Reminder

[View this email in your browser](#)

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AGENDA

- NETWORKING
- EDUCATION
- ADVOCACY (LEGISLATION)
- PROFESSIONALISM

Thursday , February 16th, 8:15am-10am, Three Flames Restaurant in San Jose

ADD THIS EVENT TO YOUR CALENDAR!

SPEAKER OF THE MONTH

[TOPIC:](#) Fair Housing and How to Stay in Compliance!

[Brief Intro:](#) Project Sentinel is a non-



MOLLY CURRENT

Project Sentinel
Director of Fair Housing Services
[650-321-6291 x8101](tel:650-321-6291)
mcurrent@housing.org



BREAKFAST MEETING COSTS:

First Time Guests Are FREE!
Members: FREE with membership
Affiliates: FREE with membership
Returning Non-Members: \$20@door

WHERE WE MEET:
Three Flames

profit organization. It's primary function is to assist individuals with housing problems such as discrimination, mortgage foreclosure & delinquency, rental issues including repairs, deposits, privacy, dispute resolution, home buyer education, post purchase education, and reverse mortgages. Molly will talk about a new law prohibiting insurance discrimination, policies for processing out-of-country applicants, and the new HUD guidance on criminal records. She will also talk about the difference between Federal and California fair housing laws and how to comply with them.

SPONSOR OF THE MONTH



BURCH BOEHNER

State Farm
[408-287-8190](tel:408-287-8190)
burch.boehner.nt26@statefarm.com

1547 Meridian Ave, San Jose, CA
95125

WHEN WE MEET:
Every Third Thursday of the Month
from 8:15am to 10am

OUR NEW WEBSITE

JOIN

LIKE US ON FACEBOOK



Congrats to Our
Affiliate of the
Year for 2016!
Mr. Richard
Abdallah !

OUR AFFILIATE MEMBERS

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Click [HERE](#) to learn more!



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****Tradeshow Included! Learn,
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When: March 20-22nd

Where: The Mirage Hotel, Las
Vegas! Click [HERE](#) for Special
NARPM Pricing!

Click [HERE](#) for more info.!

WHAT YOU MISSED AT LAST MONTH'S MEETING!



Special thanks to our speaker last month, Sean Grady, with Members Insurance, [847-277-2628](tel:847-277-2628), who spoke to the group about E&O Insurance and Cyber Security. Sean reminds us to speak to your



CALNARPM CONFERENCE AND TRADESHOW

****Learn from the top minds in the industry!**

When: April 12th-14th

Where: Napa Valley Marriot Hotel!

Click [HERE](#) for more info.!



LEGISLATIVE UPDATE

Do you manage a property in Mountain View? Did you know that, as of January 7th, 2017, you must offer tenants a written lease with a minimum of two option terms: six months and one year. The landlord and tenant can also agree to a written lease with mutually acceptable terms that are different from the six months and one year term options. This ordinance applies to any apartment building

insurance agent, and make a list of action items and/or things to ask your agent about to make sure you are properly covered.

Some tips: Find out how your Policy defines what an "Insured Loss" and "Wrongful Act" means, as it varies from policy to policy. Ask your agent for the following extra coverage (little cost to you): Personal Injury = Coverage for slander and libel, and can provide for Wrongful Eviction (not related to discrimination allegations). Bodily Injury & Property Damage = Can be purchased for Property Showings only. Also, you will want to check to see if you have cyber coverage, and if your insurance carrier will do the following for you if a breach occurs: Breach Counseling, Crisis Management, Remediation Planning (i.e. credit monitoring products), Notification Assistance (costly and lots of red tape depending on state), Evidentiary Support.

Click [HERE](#) for a copy of Sean's Presentation.

OUR CHARITIES



Click [HERE](#) for more information about this amazing non-profit charity!



Family Giving Tree™

Bringing Hope and Joy to Those in Need

with three or more dwelling units in a single structure. For more information and other requirements, click [HERE](#).

For more updates like this one, visit RentalHousingNetwork.com.



Thank you to our Legislative Chair, Sandy Adams with Rental Housing Network!

SAVE THE DATE
NEXT MEETING IS
THURSDAY, MARCH 16TH -
WE WILL HAVE PANELS OF
EXPERT AFFILIATES!
Property Managers: Come
ask your questions!



Members - Read the latest [Residential Resource Magazine](#) Articles from NARPM National!

Click [HERE](#) for more information about this amazing non-profit charity!

EDUCATION / DESIGNATIONS

MARCH 14th - Managing Single
Family Homes and Small
Investments



(Note: This is an 8-Hour Course)
Managing Single Family Homes and Small Investment Properties is the result of an exciting collaboration between IREM® and the National Association of Residential Property Managers (NARPM®) that serves as a primer for agents and owners to introduce them to real estate management basics.

For more information and to register, click [HERE](#).

Don't have a
designation yet? It's time
to get one!

This year we have two classes being taught at our chapter:
[NARPM®/IREM®](#) and [Finance](#)

Achieving your designation from NARPM® is good for your business and sets you apart from your

DID YOU KNOW...

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Business Leader GOOGLE Group.

Add yourself to this group to see
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to avoid pitfalls, and to get insight
and support! If you're not a part of
this groups, you're missing a great
resource that NARPM provides to all
members!

competitors. You will not only build
your business through referrals, you
will develop new skills that help
maintain your current client base.
Apply for your designation today by
clicking [HERE](#).



Your 2017
President, Sean
McCarthy, with
Golden State
Property
Management!



The Board of Directors and Leadership
Team meet every 1st Thursday of the
month at [The Adobe Lodge](#) in Santa
Clara from 12pm-1:30pm. Everyone is
welcome to come share their ideas!
(Lunch not included) Please RSVP via
e-mail to our NARPM SCC President at
least 24 hours in advance.



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Our mailing address is: Info@NARPMSCC.com

Want to change how you receive these emails?
You can [update your preferences](#) or [unsubscribe from this list](#)



Brad Bonnifield <brad@cornerstonepm.net>

NARPM Santa Clara County - Thursday , March 16th - See Y ou Next W eek!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: info@narpmssc.com

Thu, Mar 9, 2017 at 8:15 AM

NARPM Santa Clara County - Meeting Reminder

[View this email in your browser](#)

NARPM® **HELPING YOUR PROPERTY MANAGEMENT BUSINESS GROW...**

NARPM = National Association of Residential Property Managers

AGENDA

- NETWORKING
- EDUCATION
- ADVOCACY (LEGISLATION)
- PROFESSIONALISM

Thursday, March 16th, 8:15am-10am,
Three Flames Restaurant in San Jose

ADD THIS EVENT TO YOUR CALENDAR!

It's Affiliate Month!

Join us while our Affiliate
Team of Experts answer
questions and help to educate
us on how to help our



Property Managers,

Bring a business card &
Enter To Fabulous Prizes!
No Purchase or Raffle
Ticket Required
Gifts may vary

business & leading trends in
their fields.

The Expert Panels include:

- Cleaning & Restoration -
- Contractors - Law & Attorneys
- Mortgage & Insurance
- Home Repairs
- Landscape & Roofing &
More!

Say "Thank You" to your favorite
affiliates by adding a testimonial to
the NARPM SCC webpage! Simply
send an e-mail to [Sean McCarthy](#)
with the testimonial and we'll take
care of the rest. Help them today, as
they help you throughout the year.



BREAKFAST MEETING COSTS:

First Time Guests Are FREE!

Members: FREE with membership

Affiliates: FREE with membership

Returning Non-Members: \$20@door

WHERE WE MEET:

Three Flames

1547 Meridian Ave, San Jose, CA
95125

WHEN WE MEET:

Every Third Thursday of the Month
from 8:15am to 10am

OUR NEW WEBSITE



Congrats to Our
Affiliate of the
Year for 2016!
Mr. Richard
Abdallah !

OUR AFFILIATE MEMBERS

Interested in becoming an Affiliate?
Click [HERE](#) to learn more!

SAVE THE DATE!
EDUCATION CLASS
MARCH 14, 2017

[Santa Clara Chapter \(San Jose, CA\) – Managing Single-Family Homes & Small Investment Properties SFH201](#)

JOIN

LIKE US ON FACEBOOK



BROKER OWNER RETREAT

****Tradeshow Included! Learn,
Build, an Enhance Relationships!**

When: March 20-22nd

Where: The Mirage Hotel, Las
Vegas! Click [HERE](#) for Special
NARPM Pricing!

Click [HERE](#) for more info.!



CALNARPM CONFERENCE
AND TRADESHOW

Managing Single Family Homes and Small Investment Properties is the result of an exciting collaboration between IREM® and the National Association of Residential Property Managers (NARPM®) that serves as a primer for agents and owners to introduce them to real estate management basics.

Instructor:

Kellie Tollifson, MPM® RMP®

Time: 8:00 am – 5:00 pm

(Note: This is an 8-Hour Course)

Register Online or By Form

You can sign up and pay online for education courses by log-in to [Online Registration / eCommerce](#)

OR

[Download registration form](#)

**Big Thank Y ou to
Burch Boehner ,
State Farm Insurance
Agent for sponsoring last
month's meeting!**



[\(408\) 287-8190](tel:(408)287-8190)

201 E Taylor St #2, SJ, CA 95112

<http://www.burchboehner.com/>

****Learn from the top minds in the industry!**

When: April 12th-14th

Where: Napa Valley Marriot Hotel!

Click [HERE](#) for more info.!



LEGISLATIVE UPDATE

STATE: Lawmakers have introduced a bill to repeal the Costa-Hawkins Rental Housing Act, landmark legislation that exempts new construction and single-family homes from local rent control laws.

[AB 1506](#) was introduced Friday, Feb. 17, the last day to propose bills in the California Legislature for 2017. Assemblymen Richard Bloom, D-Santa Monica; Rob Bonta, D-Oakland; and David Chiu, D-San Francisco, authored the proposal with Sen. Ben Allen, D-Santa Monica, as a co-author.

Should AB 1506 succeed and Costa-Hawkins be repealed, each city and county in California would have the ability to adopt rent control measures without any limitations. Key provisions of the Costa-Hawkins Act include:

- Exempting construction built after 1995 from local rent control laws, meaning newly constructed units could fall under rent control.

EDUCATION / DESIGNATIONS

Don't have a designation yet? It's time to get one!

This year we have two classes being taught at our chapter:

[NARPM®/IREM®](#) and [Finance](#)
Dates to follow!

Achieving your designation from NARPM® is good for your business and sets you apart from your competitors. You will not only build your business through referrals, you will develop new skills that help maintain your current client base. Apply for your designation today by clicking [HERE](#).



Read the latest
[Residential Resource](#)
[Magazine](#) Articles
from NARPM
National!

- Exempting single-family homes from any form of rent control
- Requiring all local rent control laws to contain a “vacancy decontrol” provision, which allows the rental price to increase after a tenant moves out. In other words, even if the tenant moves out voluntarily, your local rent control ordinance could require you to offer the property at the same low rent that the last tenant was paying.

- Sandy Adams

For more updates like this one,
please visit
RentalHousingNetwork.com



Thank you to
our Legislative
Chair, Sandy
Adams with
Rental Housing
Network!

Thank you Molly Current for
coming to talk to us last
month about updates and
Fair Housing hot topics!

DID YOU KNOW...

You can ask questions to NARPM
Members Nationwide!

Click [HERE](#) to join the NARPM
Business Leader GOOGLE Group.

Add yourself to this group to see
how others have handled situations,
to avoid pitfalls, and to get insight
and support! If you're not a part of
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resource that NARPM provides to all
members!



Your 2017
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McCarthy, with
Golden State
Property
Management!

The Board of Directors and Leadership
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Clara from 12pm-1:30pm. Everyone is
welcome to come share their ideas!
(Lunch not included) Please RSVP via
e-mail to our NARPM SCC President at
least 24 hours in advance.



MOLLY CURRENT

Project Sentinel

Director of Fair Housing

650-321-6291 x8101

mcurrent@fairhousing.org

2017 - I Shall Slay!



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Brad Bonnifield <brad@cornerstonepm.net>

NARPM Santa Clara County - Sign up today for the NARPM Summer BBQ!! See you Thursday!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: brad@cornerstonepm.net

Mon, Apr 17, 2017 at 8:18 AM

NARPM Santa Clara County - Meeting Reminder

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NARPM® HELPING YOUR PROPERTY MANAGEMENT BUSINESS GROW...

NARPM = National Association of Residential Property Managers

AGENDA

			
NETWORKING	EDUCATION	ADVOCACY (LEGISLATION)	PROFESSIONALISM

Thursday, April 20th, 8:15am-10am,
[Three Flames Restaurant in San Jose](#)

ADD THIS EVENT TO YOUR CALENDAR!

SPEAKER OF THE MONTH

[CalBRE Audits and You!](#)

Meeting topics include:



Pam Strickland

SPONSOR OF THE MONTH



Dave Kraszewski
SERVPRO Southwest San Jose
<http://www.servproofswsanjose.com/>

- What triggers a CalBRE audit?
- How to prepare for the auditor's visit.
- What if you face a CalBRE accusation?
- What the cost can be in fines, penalties, legal fees.

Pam's Professional Background:

Pam Strickland is an independent compliance consultant for real estate, mortgage, escrow and property management companies. She has held a California real estate license since 1980 and her clients include both CalBRE and DBO licensed companies. She strongly suggests that companies always remain completely compliant with all laws and regulations and not wait until the auditors are knocking at their door to get things in order.

In addition to her in-office consulting, Pam is a writer, speaker and instructor on real estate industry topics and an expert witness for real estate related litigation. She has over 30 years of real estate and mortgage experience and managed a large brokerage in Santa Barbara before becoming a full-time consultant in the early 1990's.

She was a founding director of the California Association of Mortgage Brokers (CAMB), and was the president of the Central Coast Chapter before becoming the state president in 1994. Past honors include being named the California Broker of the Year by the CAMB in 1992 and National Broker of the Year in 1993 by the NAMB.

NARPM
Summer BBQ



BREAKFAST MEETING COSTS:

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Members: FREE with membership

Affiliates: FREE with membership

Returning Non-Members: \$20@door

WHERE WE MEET:

Three Flames

1547 Meridian Ave, San Jose, CA
95125

WHEN WE MEET:

Every Third Thursday of the Month
from 8:15am to 10am

OUR NEW WEBSITE

JOIN

LIKE US ON FACEBOOK



Benefiting Sunday Friends Charity

When: Friday July 14th 2017

12:00pm - 5:00pm

Where: The Caldwell Ranch Resort
13485 Hardling Ave., San Martin, CA
95046

Bring your family and join your
friends at NARPM for an afternoon
of fun in the sun!

Exciting activities including pool,
bocce, basketball, ping pong,
horseback riding for children,
horseshoes, bean bag toss, auction
and prize raffle.

Buy Tickets [HERE](#)

Price: \$35 online (13 & under
free). \$40 Day Of

[Register This Thursday at
the Meeting & Receive \\$5
Off!](#)



LEGISLATIVE UPDATE

The San Jose City Council will be
considering the proposed Ellis Act
Ordinance and the Tenant
Protection Ordinance on April 18,
2017 at 1:30 p.m



Regular Session in the Council
Chambers, City Hall

4.2 Amendment to the Ellis Act
Ordinance Implementing Procedures
for Removal of Rent Stabilized Units
from the Rental Market.

This will included longer notices to
tenants and require the owner to
pay relocation fees.

4.3 The proposed City Council
action also recommends directing
staff to incorporate a requirement
that a property owner offer a
renewable one-year written lease to
tenants in the forthcoming
Apartment Rent Ordinance.

- Sandy Adams

For more updates like this one,
please visit
RentalHousingNetwork.com



Thank you to
our Legislative
Chair, Sandy
Adams with
Rental Housing
Network!



Please Note: There will not be a
regular meeting in July. Instead
please join us for our annual charity
event. It's going to be a lot of Fun!!

May 18th Guest Speaker
Mayor Sam Liccardo
City of San Jose



A BIG Thank you to our
panel Affiliates for all of
your great input and info at
our last meeting!!



Congrats to Our
Affiliate of the
Year for 2016!
Mr. Richard
Abdallah !

OUR AFFILIATE MEMBERS

Interested in becoming an Affiliate?



Knowledge Sharing
& Raffle Prizes!!

Big Applause to the Affiliates that came out to speak in the expert panels and put a face to the industry you represent! We know what a HUGE role you play in our business; and we appreciate you!

Thank you again to Dave Kraszewski, for organizing the event; and our MC, Robert Collins for keeping us on track!!



Read the latest
[Residential Resource Magazine](#) Articles
from NARPM
National!

Click [HERE](#) to learn more!

EDUCATION / DESIGNATIONS

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This year [Finance](#) will be taught at our chapter!

Dates to follow!

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Your 2017
President, Sean
McCarthy, with
Golden State
Property
Management!

The Board of Directors and Leadership Team meet every 1st Thursday of the month at [The Adobe Lodge](#) in Santa Clara from 12pm-1:30pm. Everyone is welcome to come share their ideas! (Lunch not included) Please RSVP via e-mail to our NARPM SCC President at least 24 hours in advance.



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Brad Bonnifield <brad@cornerstonepm.net>

NARPM SCC - Newsletter & NARPM Summer BBQ!! See you next week; & Happy Mother's Day Weekend!!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: brad@cornerstonepm.net

Fri, May 12, 2017 at 9:15 AM

NARPM Santa Clara County - Meeting Reminder

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THE COUNTY OF SANTA CLARA 1850

NARPM® HELPING YOUR PROPERTY MANAGEMENT BUSINESS GROW...

NARPM = National Association of Residential Property Managers

AGENDA

NETWORKING EDUCATION ADVOCACY (LEGISLATION) PROFESSIONALISM

Thursday, May 18th, 8:15am-10am,
[Three Flames Restaurant in San Jose](#)

ADD THIS EVENT TO YOUR CALENDAR!

SPEAKER OF THE MONTH

NARPM
Summer BBQ



Mayor Sam Liccardo
City of San Jose

All the Way Home

Join us as Mayor Sam Liccardo answers our questions and introduces the All the Way Home project in helping veterans find a home.

Santa Clara County has among the highest percentage of unsheltered veterans in the nation. No person who has served our country should be left out in the cold. Together we can do better! Santa Clara County and the City of San Jose have launched ALL THE WAY HOME, a campaign to house homeless veterans. New incentives are available to support those who rent to veterans.

SPONSOR OF THE MONTH



Benefiting Sunday Friends Charity

When: Friday July 14th 2017

12:00pm - 5:00pm

Where: The Caldwell Ranch Resort
13485 Hardling Ave., San Martin, CA
95046

Bring your family and join your friends at NARPM for an afternoon of fun in the sun!

Exciting activities including pool, bocce, basketball, ping pong, horseback riding for children, horseshoes, bean bag toss, auction and prize raffle.

Buy Tickets [HERE](#)

Price: \$35 online (13 & under free). \$40 Day Of

[Register This Thursday at the Meeting & Receive \\$5 Off!](#)

[If your company would like to donate an item for the fund raising auction, the charity supported is Sunday Friends](#)





Dave Kraszewski
SERVPRO Southwest San Jose
<http://www.servproofswsanjose.com/>



Please Note: There will not be a regular meeting in July. Instead please join us for our annual charity event. It's going to be a lot of Fun!!

June 15th Guest Speaker
Larry Stone
Santa Clara County Assessor



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Mr. Richard
Abdallah !

OUR AFFILIATE MEMBERS

OUR NEW WEBSITE

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LIKE US ON FACEBOOK



LEGISLATIVE UPDATE

May 9, 2017, the San José City Council approved the Tenant Protection Ordinance (TPO) which goes into effect immediately. After over two years of public debate over the TPO, the City Council approved requirements for landlords to state a cause when notifying tenants to vacate, providing rights to tenants faced with notices to vacate.

The TPO will apply to all apartments with three units or more on the same property, regardless of when they were constructed. According to the San Jose Housing Department, the TPO applies to over 87,000 rental apartments in San José. Landlords will only be allowed to terminate tenancy under one of the twelve just causes stated in the ordinance which include:

Just cause reasons based on tenant actions

1. Nonpayment of rent
2. Material or habitual violation of the lease
3. Substantial damage to the apartment

Interested in becoming an Affiliate?

Click [HERE](#) to learn more!

EDUCATION / DESIGNATIONS

This year
Finance Cash Flow
Analysis will be
taught at our chapter!

Instructor: Vickie Gaskill,

MPM® RMP®

Course Description:

This advanced course will teach you how to forecast and calculate your client's cash on cash return and their internal rate of return on their investment properties. You will also learn how to measure your performance and effectiveness as a property manager. Whether your client is a traditional investor or a "frustrated seller", once the property becomes a rental, it is all about the numbers. Understanding the "numbers" will enable you to advise your clients based on what is in their financial best interests and explain how. You can better forecast how a replacement vs. a repair, or a rent increase, can enhance the property's value. You move from someone that just collects rent and coordinates repairs and move to being their consultant.

When: September 12, 2017

Location: Century 21 Alpha, 5978
Silver Creek Valley Road #50, San
Jose, CA 95138

4. Refusal to agree to a like or new rental agreement
5. Nuisance behavior
6. Refusing access to the apartment, requested in accordance in law
7. Unapproved holdover subtenant
- Just cause reasons based on landlord decision or consequence of action
8. Substantial rehabilitation of the apartment
9. Ellis Act removal or demolition
10. Owner move-in
11. Order to vacate
12. Vacation of Unpermitted apartment

The tenant has the right to challenge "just cause" reasons 1 through 7 (tenant actions).

The owner will be required to pay relocation fees to the tenant for "just cause" reasons 8 through 12 (owner action).

Councilmembers Johnny Khamis and Dev Davis were the only members who voted against the action.

- Sandy Adams

For more updates like this one, please visit RentalHousingNetwork.com



Thank you to our Legislative Chair, Sandy Adams with

Time: 9 am – 4 pm

Cost:

\$195 for members before 8/20/17

[Online Registration / eCommerce](#)

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Your 2017 President, Sean McCarthy, with Golden State

A Big Thank you to our
April Speaker ,
Pam Strickland!!

It was a very informative
session, hearing about the
many pitfalls and best
practices when it comes to
BRE Audits and our
Property Management
profession



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NARPM [®] **HELPING YOUR PROPERTY MANAGEMENT BUSINESS GROW...**

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AGENDA

- NETWORKING
- EDUCATION
- ADVOCACY (LEGISLATION)
- PROFESSIONALISM

Thursday, June 15th, 8:15am-10am,
**Please Note : No Meeting in July. Instead
Please Join Us for Some Fun with the
Summer BBQ July 14th, Benefiting Sunday
Friends Charity!**

Details below...

[Three Flames Restaurant in San Jose](#)

ADD THIS EVENT TO YOUR CALENDAR!

SPEAKER OF THE MONTH



Larry Stone

Santa Clara County Assessor

Has the Silicon Valley “boom” peaked? What’s ahead? More smooth sailing or choppy waters?

Assessor Larry Stone will discuss the current status and trends of our real estate markets from office, industrial and retail, to single-family and apartments. He will also comment on key economic indicators to Silicon Valley, including venture capital investment, IPO’s, patents, and immigration. A real estate investor and developer by profession, Stone has been the elected Assessor for 22 years. He manages a department responsible for \$419 billion in assessed values

NARPM Summer BBQ



Benefiting Sunday Friends Charity

When: Friday July 14th 2017

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[If your company would like to donate an item for the fund raising auction, the charity supported is Sunday Friends](#)

generating \$4.2 billion in property tax revenue supporting our schools and local governments.

SPONSOR OF THE MONTH



Gallaher Construction

Francesca Gallaher

francesca@gallaherco.com

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(408) 825-1362

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LEGISLATIVE UPDATE

Measure G Approved by the Voters

Extended Deadline to Register a
New Residential Landlord Business
-- Now December 15, 2017

Residential landlords of one or two rental units - which includes those who rent out a room in their home or accessory unit - will now pay the San José business tax for the first time as of July 1, 2017. The City Council established a grace period until December 15, 2017, so that these residential landlords can apply

MPM® RMP®

Course Description:

This advanced course will teach you how to forecast and calculate your client's cash on cash return and their internal rate of return on their investment properties. You will also learn how to measure your performance and effectiveness as a property manager. Whether your client is a traditional investor or a "frustrated seller", once the property becomes a rental, it is all about the numbers. Understanding the "numbers" will enable you to advise your clients based on what is in their financial best interests and explain how. You can better forecast how a replacement vs. a repair, or a rent increase, can enhance the property's value. You move from someone that just collects rent and coordinates repairs and move to being their consultant.

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[Online Registration / eCommerce](#)

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for and secure a valid business tax certificate from the City and pay the business tax without incurring penalties and interest. If the payment of the business tax is made after December 15, 2017, then interest and penalties will accrue retroactive to July 1, 2017. For more information or to register your rental go to: <http://www.sanjoseca.gov/index.aspx?NID=2812>

- Sandy Adams

For more updates like this one, please visit RentalHousingNetwork.com



Thank you to our Legislative Chair, Sandy Adams with Rental Housing Network!

A Big Thank you to San Jose City Mayor , Sam Liccardo for meeting with us in May!

Topics included All the Way Home project in helping veterans find a home and a Q&A Session touching on the Hot Topics in the PM Industry.

Details of All the Way Home: Santa Clara County has among the highest percentage of unsheltered veterans in the nation. No person who has served our country should be left out in the cold. Together we can do better! Santa Clara County and the

Apply for your designation today by clicking [HERE](#).

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National!



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NARPM SCC~ Annual Summer BBQ Event is Here! Register Today for July 14th!!

NARPM Santa Clara County <info@narpmssc.com>

Thu, Jul 6, 2017 at 9:09 AM

Reply-To: NARPM Santa Clara County <info@narpmssc.com>

To: info@narpmssc.com

You're Invited To The NARPM Annual

 **SUMMER BARBECUE** 

benefiting Sunday Friends Charity

Friday July 14th 2017 - 12:00 PM to 5:00 PM

Catered By: **The Ranch Resort**
At San Martin
13485 Harding Ave
San Martin, 95046
Noon - 5PM
Food, Sodas, Beer, Wine

Events:

- Basketball Shooting
- Beanbag Toss
- Horseshoes
- Bocce
- Ping Pong
- Pool and Jacuzzi
- Horseback rides for kids!

Sponsors Wanted!
To sponsor contact Dave K at
servprodave@gmail.com

Fun

Cost: \$35 each ages 14 & up. Kids 13 & under free. This BBQ is a potluck, please bring an appetizer, side, or dessert to share.

Annual SCC NARPM

Charity Summer BBQ!

Great Event for the Entire Office Team!!
Haven't Signed up Yet?

Click [HERE](#) to Register

Handy info:

Have fun in an event? You're eligible to win a prize!

Want to Donate a Prize to the Charity Raffle? Very much appreciated!

Bringing a car? Great, Property Parking Available After Street Parking Full :)

See you Next Friday!

Please NOTE: There will not be a July NARPM Meeting at Three Flames
Instead Join Us for Fun in the Sun!!



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Santa Clara Chapter of NARPM · 956 Saratoga Avenue · San Jose, CA 95129 · USA



Brad Bonnifield <brad@cornerstonepm.net>

SCC NARPM ~ August Backpack Drive is On! ~ See you Thursday!!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: info@narpmssc.com

Mon, Aug 14, 2017 at 8:00 AM

NARPM Santa Clara County - Meeting Reminder

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- EDUCATION
- ADVOCACY (LEGISLATION)
- PROFESSIONALISM

Thursday, August 17th, 8:15am-10am,
[Three Flames Restaurant in San Jose](#)

Please Note: The October Meeting will be held October 26, 2017

ADD THIS EVENT TO YOUR CALENDAR!

August Guest Speaker

Congrats to Our



Sandy Adams



Meeting Topics Include:

Measure G Approved by the Voters

The Business Tax - Registering
your Residential Properties

Rent Control | Occupancy Standards

| Defining Criminal Activity | Limits
on Rent Increases

Capital Improvement Pass-thru

Backpack Drive!!!



Once a year, NARPM has a
backpack drive for the
The Family Giving
Tree charity.

This meeting is THE meeting!
Don't forget to bring backpacks
and/or items to
put in the backpacks. Don't



Affiliate of the
Year for 2016!
Mr. Richard
Abdallah !

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EDUCATION / DESIGNATIONS

Have You Enrolled?

Finance Cash Flow
Analysis will be
taught at our chapter
Next Month!

Instructor: Vickie Gaskill,

MPM® RMP®

Course Description:

This advanced course will teach you
how to forecast and calculate your
client's cash on cash return and their
internal rate of return on their
investment properties. You will also
learn how to measure your
performance and effectiveness as a
property manager. Whether your
client is a traditional investor or a
"frustrated seller", once the property
becomes a rental, it is all about the
numbers. Understanding the
"numbers" will enable you to advise
your clients based on what is in their
financial best interests and explain
how. You can better forecast how a
replacement vs. a repair, or a rent
increase, can enhance the

have time to shop?
The Family Giving Tree will
shop for you-
-Checks donations are also
appreciated.

**No blue or red backpacks
please.***

Check out: [OfficeMax](#), [Office
Depot](#),
or [Staples](#) online for savings!

August Sponsor



[Marcia Shea - LegalShield
Independent Associate](#)
@
[legalshieldindependentasso
ciatemarciashea](#)

Good
Company, Fun
Times &
All for a Great
Cause

property's value. You move from
someone that just collects rent and
coordinates repairs and move to
being their consultant.

When: September 12, 2017
Location: Century 21 Alpha, 5978
Silver Creek Valley Road #50, San
Jose, CA 95138

Time: 9 am – 4 pm

Cost:

**\$195 for members
before 8/20/17**

[Online Registration / eCommerce](#)

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designation yet? It's time
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NARPM® is good for your business
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competitors. You will not only build
your business through referrals, you
will develop new skills that help
maintain your current client base.
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**September Guest
Speaker**

Thank You for
making our
Annual Family
BBQ such a
Special Event!



Benefiting
Sunday Friends Charity



Special Thank You to our
Gracious Hosts,
Andrea & Pat Caldwell
& our Sponsors:

Allison DiSarro



Topic: Banking Broker Trust Accounts

Allison DiSarro is the Senior Vice President of Property Management Banking at Seacoast Commerce Bank. Seacoast Commerce Bank's Property Management division is focused solely on banking Property Management Companies and their Broker Trust Accounts. While Trust Accounts remain a "taboo subject" at most banks, Allison specializes in the rules set forth by the Bureau of Real Estate to ensure clients are consistently in compliance, to avoid any future failed audit.

Allison has been with Seacoast Commerce Bank since early 2010, banking ONLY Property Management companies and works closely with the software vendors and payment processors. Allison has been referred many times by BRE auditors and auditing consultants due to the lack of knowledge at banks on broker trust accounts.

- A Clean Gutter
- Burch Boehner, State Farm
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BRE APPROVED TRUST ACCOUNTS- DOES YOUR BANK DO IT RIGHT?

- ~ Will your Trust account pass a BRE audit?
- ~ Why do so many banks get it wrong?
- ~ Signature Card Compliance
- ~ Additional Risks from having your "trust accounts" at the wrong bank

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Your 2017 President, Sean McCarthy, with Golden State Property Management!

The Board of Directors and Leadership

Team meet every 1st Thursday of the month at [The Adobe Lodge](#) in Santa Clara from 12pm-1:30pm. Everyone is welcome to come share their ideas! (Lunch not included) Please RSVP via e-mail to our NARPM SCC President at least 24 hours in advance.



Read the latest
[Residential Resource Magazine](#) Articles
from NARPM
National!



BREAKFAST MEETING COSTS:

First Time Guests Are FREE!

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Returning Non-Members: \$20@door

WHERE WE MEET:

Three Flames

1547 Meridian Ave, San Jose, CA
95125

WHEN WE MEET:

Every Third Thursday of the Month
from 8:15am to 10am



LEGISLATIVE UPDATE

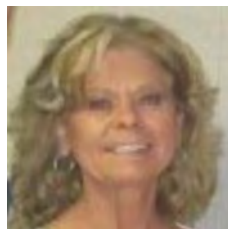
Measure G Approved by the Voters

Extended Deadline to Register a
New Residential Landlord Business
-- Now December 15, 2017

Residential landlords of one or two rental units - which includes those who rent out a room in their home or accessory unit - will now pay the San José business tax for the first time as of July 1, 2017. The City Council established a grace period until December 15, 2017, so that these residential landlords can apply for and secure a valid business tax certificate from the City and pay the business tax without incurring penalties and interest. If the payment of the business tax is made after December 15, 2017, then interest and penalties will accrue retroactive to July 1, 2017. For more information or to register your rental go to: <http://www.sanjoseca.gov/index.aspx?NID=2812>

- Sandy Adams

For more updates like this one,
please visit
RentalHousingNetwork.com



Thank you to
our Legislative
Chair, Sandy
Adams with



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Brad Bonnifield <brad@cornerstonepm.net>

NARPM Class - Finance: Cash Flow Analysis - It's not too late to Enroll for this Class Hosted by SCC on 9/12/17!!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: info@narpmssc.com

Thu, Sep 7, 2017 at 8:49 AM



Santa Clara and Alameda/Contra Costa Counties Chapters Education

Location: Century 21 Alpha, [5978 Silver Creek Valley Rd. #50, San Jose, CA](#)
[95138](#) Location Phone Number: [408.313.8274](#)

COURSE: [Finance](#) [Cash Flow Analysis](#)
September 12, 2017 | 9am - 4pm

Instructor: Vickie Gaskill, MPM® RMP®



[Online Register](#) [HERE](#)

Course Description:

This advanced course will teach you how to forecast and calculate your client's cash on cash return and their internal rate of return on their investment properties. You will also learn how to measure your performance and effectiveness as a property manager. Whether your client is a traditional investor or a "frustrated seller", once the property becomes a rental, it is all

about the numbers. Understanding the “numbers” will enable you to advise your clients based on what is in their financial best interests and explain how. You can better forecast how a replacement vs. a repair, or a rent increase, can enhance the property’s value. You move from someone that just collects rent and coordinates repairs and move to being their consultant.

How YOU will Benefit?

By learning cash flow analysis and how to measure your own performance you will be able to better advise and better serve your clients. When you can quantify how your performance is superior, and how your recommendations contribute to a more profitable ownership experience, more clients will seek you out and your existing clients will more highly value your input and advice.

Learning Objectives:

- Identify the different components of Cash Flow Analysis
- Describe how to calculate the income derived from Cash Flow
- Explain how income is derived from Loan Amortization
- Summarize tax considerations and tax “savings to an investor
- Explain how income is derived from Appreciation
- Calculate a budgeted cash flow for a rental house
- Calculate budgeted IRR for a rental house

FEE FOR COURSE:

NARPM Member: \$250

Non-NARPM Member: \$350

Retake \$150

RMP®/MPM® Designee \$150

Designee Candidate \$250

**Course sponsored by the Santa Clara and
Alameda/Contra Costa Counties Chapters of NARPM®**

**Contact: Andrea Caldwell, MPM® RMP®,
agetto@aol.com or 408.313.8274**

REGISTRATION

Name _____

Company _____

Address _____
City/ST/Zip _____
Phone _____
Email _____

METHOD OF PAYMENT

☐ Check enclosed for \$_____ Chk #_____

☐ Charge my credit card \$_____

☐ VISA ☐ MC ☐ AMEX ☐ Discover

Name on card _____

Signature _____

----- All information below this line will be shredded. -----

Card # _____

Exp Date _____ Security Code _____

CANCELLATION POLICY Cancellations must be received in writing. If received by August 31, 2017, registrant will receive a full refund less a \$25.00 processing fee. If received after August 31, 2017, a 50% refund will be issued. No refunds will be made on the day of class; however, the registration fee can be applied to a later class, with a \$25.00 transfer charge. If course is cancelled because a minimum of 10 registrations have not been met or for any other reason, tuition paid will be fully refundable. All courses are subject to cancellation by NARPM®.

In order to receive a certificate of completion, students must achieve a minimum of 70% on the NARPM® exams.

FAX, MAIL or E-MAIL REGISTRATION FORM:

638 Independence Parkway, #100, Chesapeake, VA 23320 P: 800-782-3452 |

F: 866-466-2776 E: educationinfo@narpm.org Or sign up using the Member log-in at www.narpm.org

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Brad Bonnifield <brad@cornerstonepm.net>

NARPM SCC September Newsletter ~ See you Thursday!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
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Mon, Sep 18, 2017 at 9:04 AM

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AGENDA

- NETWORKING
- EDUCATION
- ADVOCACY (LEGISLATION)
- PROFESSIONALISM

Thursday, September 21st, 8:15am-10am,
[Three Flames Restaurant in San Jose](#)

Please Note: The October Meeting will be held October 26, 2017
SAVE THE DATE! HOLIDAY PARTY Dec.13th, 5:30pm!!

ADD THIS EVENT TO YOUR CALENDAR!

September Guest

Speaker

Allison Disarro



Topic: Banking Broker Trust Accounts

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DOES YOUR BANK DO IT RIGHT?**

- ~ Will your Trust account pass a BRE audit?
- ~ Why do so many banks get it wrong?
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**Your 2017
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Golden State
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LEGISLATIVE UPDATE

Bills passed but not yet signed:

Capitol Hill has been busy trying to solve the state's housing problems with new legislation. Governor Brown has shown support for more affordable housing legislation, therefore he is expected to sign the bills that have already made it to his desk.

Senate Bill 2 would create a permanent source of funding for affordable housing by charging up to \$225 on certain real estate transactions. (Not Home and Commercial Real Estate Purchases)

Senate Bill 3 would place a \$4 Billion statewide housing bond on a future ballot. This money would fund existing affordable housing projects that are no longer funded by the state's Redevelopment Agency.

Senate Bill 35 addresses the state's housing-supply shortage. Currently the state provides the cities with the number of units they need to build each year in order to keep up with their share of the regional demand. However, the cities are not required to build the recommended number of units. Under SB 35 the state would take a more aggressive approach to require cities to approve more housing developments.

SB 166 would push cities to plan for more low-income to moderate-income housing.



BREAKFAST MEETING COSTS:

First Time Guests Are FREE!

Members: FREE with membership

Affiliates: FREE with membership

Returning Non-Members: \$20@door

WHERE WE MEET:

Three Flames

1547 Meridian Ave, San Jose, CA
95125

WHEN WE MEET:

Every Third Thursday of the Month
from 8:15am to 10am

Assembly Bill 634 , if signed by the Governor, will eliminate local HOA approved rules and replace them with statewide mandates that will allow an individual owner to install a solar energy system on the roof of the building in which the owner resides, or a garage or carport adjacent to the building that has been assigned to the owner for exclusive use.

- Sandy Adams

For more updates like this one,
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RentalHousingNetwork.com



Thank you to
our Legislative
Chair, Sandy
Adams with
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Brad Bonnifield <brad@cornerstonepm.net>

NARPM SCC Newsletter ~ See you Oct. 26th!! Holiday Party Event is Here - Register Today!!

NARPM Santa Clara County <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>
To: brad@cornerstonepm.net

Fri, Oct 13, 2017 at 12:33 PM

NARPM Santa Clara County - Meeting Reminder

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- ADVOCACY (LEGISLATION)
- PROFESSIONALISM

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SAVE THE DATE! HOLIDAY PARTY Dec.13th, 5:30pm!!

Join The Fun & Reserve Your Office A Spot [HERE!!](#)

ADD THIS EVENT TO YOUR CALENDAR!

October Guest Speaker



Trustee Help
Respect • Sort • Move it out!

Cari Hays

Founder & President

Trusteehelp.com
(408) 489-9558

Topic: Hoarding

The process Property Managers
/ Landlords should go through for a
tenant and their belongings

October Sponsor



A Clean Gutter

Bob Russell

(408)476-7100

acleangutter@gmail.com



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Richard

Abdalah !

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Holiday Party!!**
**Benefiting Sunday
Friends Charity**



Join us for Good Times,
Cocktails,
Casino Night, Dinner &
Exciting Raffle Prizes!

Please Register [HERE](#) for this
Exciting Event!!
Doors and cash bar open at 5:30
pm!
First Guest: \$50 | Each Additional
Guest: \$25
Please bring a \$50 Gift for the Raffle
per Company

I-Something Raffle Tickets Available,
Cost: \$25 / ticket



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signing into law the following bills:

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Under SB 35 the state will take a more aggressive approach to require cities to approve more housing developments.

Senate Bill 166 will push cities to plan for more low-income to moderate-income housing.

Assembly Bill 352 will help increase the stock of micro units, "efficiency dwelling units," which usually measure 220 square feet or less.

On another note, we seem to be returning to the "Department of Real Estate."

SB-173 Real estate: Bureau of Real Estate

"Whenever the terms "bureau,"
"division," "Bureau of Real Estate,"
"State Real Estate Division," or
"Real Estate Division" are used, they
mean the Department of Real
Estate.

Whenever the terms "Bureau of Real
Estate," "State Real Estate Division,"
or "Real Estate Division" are used in
any other law, they mean the
Department of Real Estate.

This section shall become operative
on July 1, 2018."

- Sandy Adams

For more updates like this one,
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our Legislative
Chair, Sandy
Adams with
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Brad Bonnifield <brad@cornerstonepm.net>

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- PROFESSIONALISM

Thursday, November 16th, 8:15am-10am,
[Three Flames Restaurant in San Jose](#)

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ADD THIS EVENT TO YOUR CALENDAR!

November Guest Speaker

Brian Chong , CPA,
CFP®



Premier Tax Advisors

www.premiertaxadvisors.com

How to Avoid Paying Taxes When Selling a Rental Property

Brian is the owner of Premier Tax Advisors in San Jose - the #1 rated CPA firm on Yelp. Brian is a licensed CPA, CFP, Enrolled Agent, and has a Bachelor's degree in Economics from UC Berkeley and a Master's degree in Taxation from San Jose State. Prior to starting his accounting firm, Brian worked at Ernst & Young, Cisco Systems, and Marcus & Millichap. The majority of his clients are tech professionals, real estate investors, and business owners.

brian@premiertaxadvisors.com

[\(408\) 217-9992](tel:(408)217-9992)

[105 N. Bascom Ave, Ste 205.](#)

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EDUCATION

Developing Rewarding Owner Relationships

SAVE THE DATE!
February 13, 2018

Location: [Century 21 Alpha, 5978
Silver Creek Valley Road #50, San
Jose, CA 95138](#)

Time: 9 am – 4 pm

This fundamental course covering the four (4) steps in the cycle of owner relations will assist you in developing and managing your clients from first contact to termination. From the big picture to the small details, you will learn industry best practices in obtaining new clients and working with them during several scenarios.

DESIGNATIONS

November Sponsor



Hany Louis

Phone: [408-930-8453](tel:408-930-8453)

**"Don't settle for anything
less than the royal
treatment!"**

Hany@TileAndGroutKing.com

Full Service Tile and Grout
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[1902 Lafayette St. Unit C](#)
[Santa Clara CA ,95050](#)



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will develop new skills that help
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Apply for your designation today by
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Referral Promotion!

If you refer 2 Property
Managers & they
become members
...You will receive

**FREE Local Dues for a
Year!!**

Ask Brad Abbott for more
details at the next
meeting!!

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Exciting Event!!
Doors and cash bar open at 5:30
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and support! If you're not a part of
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resource that NARPM provides to all
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January 2018



Panel
Guest Speakers

Richard Abdallah

<http://www.abdalahlaw.com/>

Sandy Adams
RentalHousingNetwork.com

Paul D.
Stavolone, CPA
Martin Stavolone & Hughes CPAs
PC

Your 2017
President, Sean



McCarthy, with
Golden State
Property
Management!



Richard Abdalah
ABDALAH LAW OFFICES



www.sccaor.com

Call for Action!
Tell the San Jose City
Council to OPPOSE New
Rent Control
Regulations!

Cooperate with SCCAOR by signing
their petition against additional rent
control restrictions.

The petition can be found at:
[https://www.sccaor.com/
government/rentcontrol/](https://www.sccaor.com/government/rentcontrol/)
<https://www.facebook.com/>

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LEGISLATIVE UPDATE

Costa-Hawkins

After several unsuccessful attempts by the state Legislature to repeal the Costa-Hawkins Rental Housing Act — the landmark legislation protecting the rights of property owners against extreme forms of rent control — an alliance of advocacy groups filed a statewide ballot initiative Oct. 23 to repeal the legislation. Not only could a repeal place single-family homes under rent control, but it could expand to new construction. We already have a housing shortage. Repealing Costa-Hawkins could send developers off to other states where there are fewer restrictions.

This does not mean that state legislators have given up on repealing Costa-Hawkins. Next year we will be watching Assembly Bill 1506.

AB 1506 would repeal the Costa-Hawkins Rental Housing Act in its entirety. Costa-Hawkins, enacted in 1995 in response to increasingly strict rent control ordinances in municipalities statewide, places limits on how and when local governments may impose rent control ordinances. Costa-Hawkins preempts local ordinances by giving

landlords the authority to establish initial rent upon a unit's voluntary vacancy by the prior tenant, exempts single-family homes from rent control, and prohibits rent control on all new construction.

- Sandy Adams

For more updates like this one,
please visit
RentalHousingNetwork.com



Thank you to
our Legislative
Chair, Sandy
Adams with
Rental Housing
Network!

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Brad Bonnifield <brad@cornerstonepm.net>

SCC NARPM Holiday Party! Register Today for some Holiday Fun Next Wednesday!!

NARPM Santa Clara County <info@narpmssc.com>

Tue, Dec 5, 2017 at 2:23 PM

Reply-To: NARPM Santa Clara County <info@narpmssc.com>

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YOU'RE INVITED to
NARPM Santa Clara County Chapter's
HOLIDAY PARTY!

Register [HERE](#) for this Exciting Event!!

Wednesday, December 13th, 2017, 6:00pm

Doors and cash bar open at 5:30 pm!

~ Cocktails ~ Casino Night ~ Dinner ~ Raffle ~

Location: Three Flames Restaurant

[1547 Meridian Ave., San Jose, CA 95125](#)

First Guest: \$50 | Each Additional Guest: \$25

Please bring a \$50 Gift for the Raffle per Company

I-Something Raffle Tickets Available, Cost: \$20 / ticket





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