Submission Guidelines and Information

Types of Breakout Sessions

Workshop A presentation in which a particular issue is explored in depth (can vary in length from 50 minutes to 1 hour depending on convention schedule)

Panel Discussion A 60 to 75 minute session (depending on convention schedule) in which a particular issue is explored by a panel with audience participation

Note: We reserve the right to change your presentation format and/or length, if necessary, in order to balance the convention program. If this becomes necessary we will contact you.

The Convention Program Sub-Committee will review all proposals. Proposals **must be typed**, with all information filled out completely. This form has data entry sections to complete the information. The submitter must sign all submissions [an electronic signature is acceptable]. Incorrect, hand written or incomplete submissions will be returned and not considered until properly submitted. NARPM® policy states that affiliates may not attend or speak at NARPM® events unless they are paid exhibitors at that event.

Email your completed proposal to conventioninfo@narpm.org.

Title of Presentation: This title will be used in the Registration Brochure and On-site program. Limit the title to 150 characters, including spaces and punctuation. The title should be descriptive and eye-catching. PLEASE ENTER THE TITLE IN THE FORM FILL BELOW AND CHECK THE APPROPRIATE BOXES.

Submitting Multiple Options-See Attached Page

Format: ☒ Workshop ☐ Panel Discussion ☐ Other

Category: (Check all that apply)

☒ Small Company	☐ Large Company	☐ Personal Development
☒ Technology	☐ Office Procedures	☐ Legal
☐ Tools and/or Forms	☐ Skills	☐ Management
☒ Professional Advice	☐ Marketing	

Presenter(s) Information

Presenter Listing: List submitter's name first. For each presenter (maximum of 4), list name, **NARPM® membership status**, address, zip code, phone and fax numbers, and **email address**.

Submitting Multiple Presenters - See Attached Page

Describe public speaking experience of all presenters and expertise with proposed topic:

Submitting Multiple Presenters – See Attached Page

List of NARPM® board and committee positions held by each presenter to avoid schedule conflicts with meetings:

N/A

Session Description

Description/Summary of session: Limit to 250 words. Be as specific as possible about the learning that will take place at your presentation. This version will be edited and used in the Registration Brochure and On-site program to describe the session. Please include the primary learning objective for the session. A member of the program sub-committee will contact you to discuss the session in more depth if it is being considered.

Submitting Multiple Options – See Attached Page

Presenter Contract

On my (and my co-presenters) behalf, should this proposal be selected, I (we) agree that:

1. Individual submitting this proposal and signing this form agrees to receive all convention correspondence and accepts responsibility for conveying convention-related information to co-presenters.

2. NARPM® reserves the right to videotape and/or audiotape this entire presentation (no partial taping) and distribute the tape for sale for educational purposes. By submitting this proposal to speak you are agreeing to be video/audio taped.

3. **There is no honorarium or reimbursement to workshop presenter(s).**

4. **Please note: NARPM® policy states that affiliates may not attend or speak at NARPM® events unless they are paid exhibitors at that event.**

5. Provide bios, and audio/visual requests using the instructions in the Speaker Guidelines (which will be sent if your proposal is selected.)

6. NARPM® **requires** that all handouts/presentations be provided electronically to staff by the deadline specified to be included on the Convention Micro-site so that they can be downloaded/printed by attendees prior to the convention.

7. **If you are attending any Convention sessions/events other than your own session, the presenter(s) is responsible for registering and paying Convention registration fees.**

8. Presenter must receive prior approval from NARPM® for any survey or data collection at the Annual Convention or for any advertising/promotion/marketing of any products or services.

9. **It is understood that "selling" a product or service from the stage is prohibited and will result in not being accepted to speak in the future.**

10. **Individuals submitting or included within this proposal have agreed to be present in San Diego, California during the core dates of the NARPM® Convention and conduct this proposed presentation according to the conditions listed above during the specific time slot assigned by the program sub-committee.**

Agreed: **Theresa Conway**
Date: **February 14, 2019**

National Association of Residential Property Managers
638 Independence Parkway, Suite 100
Chesapeake, VA 23320
P: 800-782-3452 | **F:** 866-466-2776
conventioninfo@narpm.org

Workshop Titles & Summary of Session:

1. **How to Clean Up Dirty Books: A Walk thru of solutions and interaction with bookkeepers and ex AF experts on obtainable solutions** (Tami) – A discussion of the AF built-in feature that looks for and reports on various accounting discrepancies across the books. A hands-on workshop to learn about the sections on the Financial Diagnostics page, to learn what causes discrepancies, and how to fix it all. This is a great opportunity to have one on one time with real ex AppFolio experts and to get some actual "Dirty Books" cleaned up.

2. **"Between the Sheets" for a basic 101 of an Income Statement and Balance Sheet. Become a Financial Reporting Master**. (Tami) - A comprehensive discussion about financial reporting and the opportunity to talk to an expert. An overview of this topic includes an explanation of the difference between a Balance Sheet and an Income Statement and what you can expect from the Cash Flow report and other key financial reports. You'll also learn how to streamline your reporting with the use of scheduled reports.

3. **Best Practices for Troubleshooting a Bank Rec** (Tami) - Learn how to master financial reports in AppFolio. Understand which reports should reconcile, what items cause discrepancies, and how to explain the differences during a review of your books. Essentially, be prepared to make an audit a breeze!

4. **Don't be afraid to click: Accounting Features in AppFolio** (Tami) - Features that you may not be using but we know you'll Love. This topic will include payables that do not have to be painful including the new Bill Pay feature, workflows that are not just a Band-Aid, RUBs for utilities, the new GL Mapping feature, etc.

5. **Passing a DRE with Flying Colors** (Taylor) - What is a three-way reconciliation? Here's an opportunity to Triple Check your Triple Checks and to allow us to introduce you to a kick ass library of state compliance resource materials. Experts will be available to answer questions and to provide plenty of interaction.

6. **Move-in and Move-out Accounting** (Tami) - This workshop goes through the workflow of moving a tenant in or moving a tenant out offering a concise checklist of this process. It also covers how to transfer tenants within a property, as well as Closing Out a Property (and the many ways to do it).

7. **Wine 'Em Dine 'Em 1099 'Em**. (Tami) – It is NOT to early to get prepared for the 1099 season so you can stay fully compliant. W9 Best Practices start NOW. Understand the 1099 process to avoid audits and penalties and how that works within the AF Database.

8. **Are You Fyxed For Maintenance?** (Taylor) - Maintenance is a hot topic and Property Management companies are searching for solutions. Let our Chief Happiness

Officer introduce you to a great new concept and an innovative solution that takes the stress out of maintenance

9. **It's Time for A Property Check-up** (Lauren) - A look at how properties can be reviewed to check for issues with suppressed fees/management fees/reserves/ late fee setup, etc.

10. **What does onboarding look like for those new to AppFolio?** (Rayne) - Few things are more daunting then the decision to start or transition to a new Property Management software. There are a lot of questions and there is the scary prospect of putting the accounting structure of your property management company into the hands of a relative stranger. Get to know us and let our expert walk you through the steps in an easy understandable way.

11. **A Bank Switch Doesn't Have to be Scary** (Tami) - If you decide to open a new bank account for current properties, or you want to add additional bank accounts for portfolios, you'll want to ensure that every step is followed throughout this process. One little mistake today can haunt you for all eternity. It is imperative that the bank accounts recorded in AppFolio represent the actual bank accounts your company utilizes to manage operating and escrow funds for the properties in your business. This is NOT something you can do on your own. You will need an expert by your side.

12. **"How to Embezzle from a PMC"** (Taylor) - A look at how to execute a successful embezzlement (Opportunity, Rationalization, Pressure). Would you recognize that funds are missing? What internal controls do you have in place to help prevent being the next victim of fraud and theft? An interactive session of real life stories, Q&A, and other scenarios that will make you question, "is anyone is safe?"

Our Presenters Are:

Taylor Hou
ex-AppFolio and Chief Happiness Officer at APM Help. 500Startups Batch 8 founder with prior tech startup and never ending product enthusiast. TechCrunch disrupt finalist and recent NARPM luncheon speaker.

Tami Tamacori
Graduate of University of Colorado at Colorado Springs with a degree in Business Admin, emphasis in Accounting; CPA Candidate; Licensed real estate agent/REALTOR; Owner of local property management company; Girl Scout trainings; State audit assistance; Former local NARPM Chapter Treasurer.

Lauren Crosby
ex-AppFolio Expert, podcast interviewee, APM consultant at NARPM conventions. Certified Product Expert of AppFolio Property Manager, was an onboarding specialist with AppFolio and Dedicated Account Manager on the customer service team.

Rayne Boniedot

ex-AppFolio, lead live webinar chats, built training documents for new hires on the onboarding team and customer service team. Graduated from Southern Methodist University, Cox School of Business with a degree in Marketing. Certified Product Expert of AppFolio Property Manager, was an onboarding specialist with AppFolio and Dedicated Account Manager on the customer service team.