

BROKER/OWNER

Conference & Expo

EVENT PROGRAM



April 25-27, 2023
Omni La Costa Resort & Spa
Carlsbad, California



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Communities in Schools®	





Hello NARPM® Friends:

I want to welcome you to NARPM®'s 2023 Broker/Owner Conference & Expo! So many of you meeting in person will be a joy and this week will be packed full of information and fun. As we focus on SALES, PROFIT, and IMPACT, you will get ideas on improving each of these important topics. Our sessions are geared toward them. I encourage you to take in as many of the workshop sessions as you can. Most of them are lead by people just

like you, NARPM® members. They volunteer their time and knowledge to help you become a better property manager and improve our industry, there is *Strength in Community*.

While you are with us in Carlsbad, I encourage you to soak up as much as you can. Trust me; there is something that you know that can help a fellow property manager. So dig in and share it. That is what NARPM® is all about.

There was a lot of volunteer and staff work that went into the production of this event. I want to send a special "Thank You" to the Broker/Owner Committee, chaired by Scott Brady, MPM® RMP®! They made all this possible along with the hard-working staff.

Now that you are ready to get started, take a few minutes to look at the schedule of events on pages 9 to 12. Star the sessions that look the most interesting to you, and map out your plan. Do not worry if you miss something; there will be a lot of discussion on everything that has happened in the hallways, bars, and restaurants. There will be plenty of time to find *Strength in Community*. Also, make it a point to visit and support our Partners, Exhibitors, and Sponsors at the Expo.

A handwritten signature in black ink that reads "Timothy J. Wehner". The signature is fluid and cursive.

Tim Wehner, MPM® RMP®
2023 NARPM® President



Special Recognition

Special Thank you for our Broker Owner Committee

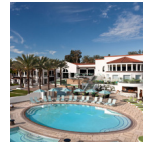
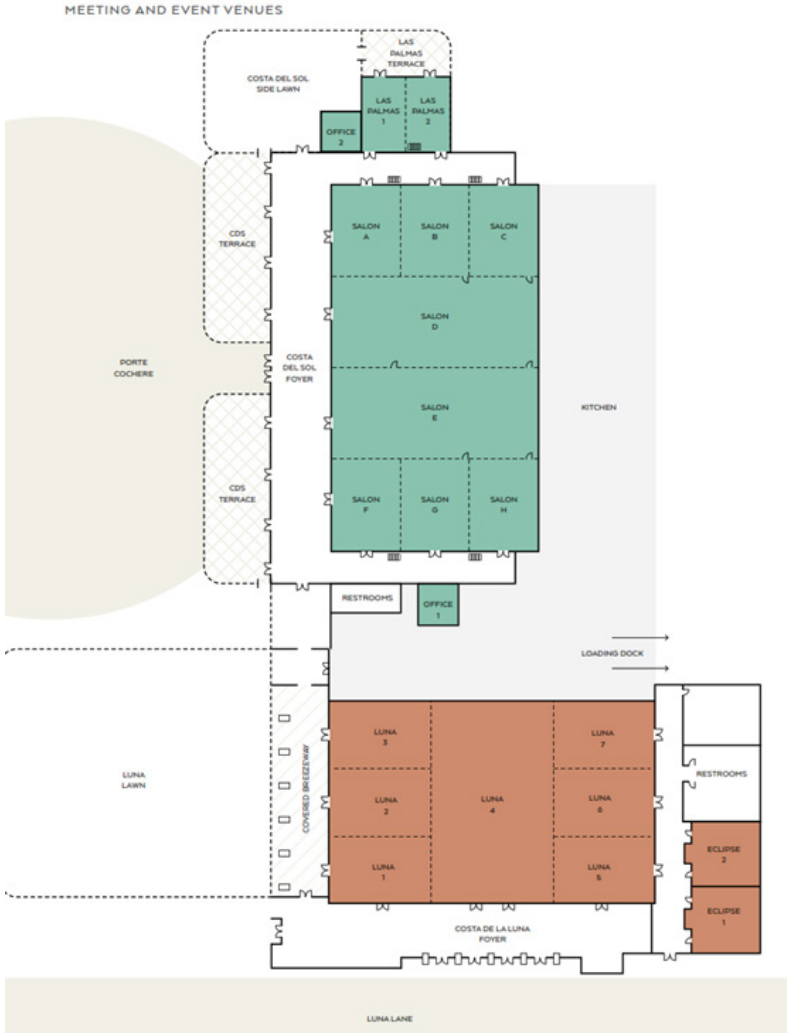
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Courtney Rosen RMP®
Jennifer Spadine
Matthew Tringali
Nataliya Matejka
Jarrett Lau
and Karen Gould, NARPM Meeting Planner

Special Recognition for Room Hosts

Garrett Brady
Scott Brady
Charles Chang
Melissa Hargreaves
Tal Kramer MPM® RMP®
Jarrett Lau
Jennifer Spadine
Tracy Streich RMP®
Matthew Tringali



Hotel Floorplan



Conference Information

Location

Welcome to our 2023 Broker/Owner Conference and Expo. We are happy that you are here, and hope that this Conference and your attendance at the Omni La Costa Resort & Spa is enjoyable, rewarding, educational, and fulfilling. The address of the property is 2100 Costa Del Mar Rd. Carlsbad, CA 78251.

Omni La Costa Resort & Spa is a refreshing retreat, located just 30 minutes from the San Diego International Airport. Explore all that San Diego and Carlsbad have to offer and maybe take a trip to Legoland®. This resort offers plenty of space to relax, unwind, play and reconnect, from eight swimming pools to golf, a spa experience, tennis, several onsite restaurants, nearby premier shopping, and more. For additional activities in the greater San Antonio area visit <https://visitcarlsbad.com/>.

Conference Dress

Appropriate dress for all parts of the NARPM® Broker/Owner Conference in Carlsbad, California, is business casual. Remember hotel meeting room temperatures vary greatly, especially in the exhibit hall, so please dress accordingly – layers are good. The average high temperature in Carlsbad in April is 75 degrees and the average low is 54 degrees.

Endorsement

Inclusion in the Conference program of advertisements and other material, including workshop presentations, does not reflect the endorsement of NARPM®.

Please help make a comfortable Conference experience for all

Smoking is prohibited at all conference events. Please turn off all cell phones and pagers or put them on vibrate mode during sessions. Thank you.



Schedule of Events - Monday & Tuesday

All times are for the current **Pacific time zone**.
All sessions will be recorded and will be available on-demand.

MONDAY, APRIL 24, 2023

4:00 pm – 6:00 pm **Registration Open** **Costa Del Sol Foyer**

TUESDAY, APRIL 25, 2023

7:30 am **Registration Open** **Costa Del Sol Foyer**

8:45 am – 10:00 am **Opening Keynote Session: Reality Returns** **Costa Del Sol ABCDE**
Speaker: Rob Hahn

With a varied background from finance, corporate law, technology, product development, media and entertainment, startups, fashion and even as a professional card player, Rob brings a unique perspective to business problems. Rob started in real estate at a specialized commercial real estate investment firm investing in airplane hangars (true story!). He moved on to Realogy, where he headed the interactive marketing for Coldwell Banker Commercial. Rob writes the well-known blog Notorious R.O.B., where he opines on topics in real estate, technology, marketing, and strategy through far-too-long posts. He is a prolific speaker at industry events, such as Inman Connect, T3 Summit, local, state and National Association events, as well as weddings and bar mitzvahs. Somehow named to the Inman 100 Most Influential People list despite his best efforts not to be noticed, Rob understands that with great power comes great responsibility. Conversely, he notes that with very little power comes very little responsibility.

10:05 am – 10:30 am **General Session: The Business Hierarchy of Needs** **Costa Del Sol ABCDE**
Speaker: Tracy Streich RMP®

You most assuredly have heard of Maslow's Hierarchy of needs. Your business operates on these same principles. These needs are not mutually exclusive, they build on each other. We have laid out the conference breakout sessions based on these needs. You pick where you and your business need the most help and focus in on these in the breakout sessions. We will briefly discuss the five areas and help you have a better understanding of where your time needs to be focused during the break-out sessions.

10:30 am – 10:45 am **Refreshment Break** **Costa Del Sol ABCDE**

10:45 am – 11:35 am **Workshop Sessions 1 – 3**

Schedule of Events - Tuesday

1. How to Make Broker-Owner Invaluable to Your Business Speaker: Tracy Streich RMP®	Costa Del Sol ABCDE
2. Managing Team Members (All Over the World)- Profit Speaker: Matthew Tringali	Costa Del Sol FGH
3. Growth-Profit Symposium – Sales Speaker: Courtney Rosen RMP®	Costa de la Luna 5-7
11:35 am – 11:45 am Refreshment Break	Costa Del Sol Foyer
11:45 am – 12:35 pm <u>Workshop Sessions 4 – 6</u>	
4. Short Term Rental Panel – Sales Speakers: Andy Moore MPM® RMP®, Brian Birdy MPM® RMP® & Robert Gilstrap MPM® RMP®	Costa Del Sol ABCDE
5. Top Broker Owner Panel – Legacy Speakers: Jordan Muela, Lisa Fore RMP®, Steve Welty & Maranda Hunnicutt	Costa Del Sol FGH
6. How to Keep Your RBP (Resident Benefits Package) Out of Court – Order Speaker: Kimberly Godsey	Costa de la Luna 5-7
12:35 pm – 1:40 pm Lunch	Costa Del Sol ABCDE
1:45 pm – 2:35 pm <u>Workshop Sessions 7 – 9</u>	
7. Creating and Maximizing the Value of Your Business – Legacy Speakers: Brandon Dobell	Costa Del Sol ABCDE
8. Litigation, Laws and Risk Mitigation (Keep Out of Jail) – Order Speaker: Monica Gilroy	Costa Del Sol FGH
9. Using Technology to Improve Your Profits – Profit Speakers: Todd Ortscheid	Costa de la Luna 5-7
2:00 pm – 7:15 pm Vendor Expo Opens	Costa de la Luna 1-4 and Foyer

Schedule of Events - Tuesday

2:45 pm – 3:45 pm	Pick Your Progress: <ul style="list-style-type: none">• Networking (Solving Pain Points)• Masterminding (Think, Pair, Share)• Vendoring (Improving Your Business)	Costa Del Sol ABCDE Costa Del Sol FGH Costa de la Luna 1-4 and Foyer
3:45 pm – 4:00 pm	Coffee/Snack Break	Costa Del Sol ABCDE
3:45 pm – 4:45 pm	General Session Keynote: Create a Culture of Listening Speaker: Heather Younger, Founder and CEO of Employee Fanatix Heather R Younger is the Founder and CEO of Employee Fanatix, a leading employee engagement and consulting firm. She is a sought-after keynote speaker who brings revealing insights to the stage from over 25,000 employee experiences. A diversity, equity and inclusion strategist, and the world's leading expert on listening at work, she is the host of the Leadership with Heart Podcast. Heather is a regular contributor to Forbes and Fast Company and is the best-selling author of The 7 Intuitive Laws of Employee Loyalty, which hit the top of the "Forbes Must-Read List for HR Professionals." Her latest best-selling book, The Art of Caring Leadership, teaches the radical power of caring support in leadership and in the workplace.	Costa Del Sol ABCDE
5:15 pm – 7:15 pm	Vendor Expo and Reception	Costa de la Luna 1-4 and Foyer



Schedule of Events - Wednesday

WEDNESDAY, APRIL 26, 2023

7:30 am	Registration Open	Costa Del Sol Foyer
7:30 am – 9:00 am	CRMC® Roundtable	Las Palmas 1
7:30 am – 8:45 am	Continental Breakfast	Costa de la Luna Lawn
8:45 am – 10:15 am	General Session: The Jolt Effect Speaker: Ted McKenna, DCM Insights The JOLT Effect: How High Performers Overcome Customer Indecision, and is a sought-after speaker and advisor to sales and customer experience teams around the world.	Costa Del Sol ABCDE
10:15 am – 10:30 am	Refreshment Break	Costa Del Sol ABCDE
10:15 am – 5:00 pm	Vendor Expo Opens	Costa de la Luna 1-4 and Foyer
10:40 am – 11:30 am	<u>Workshop Sessions 10 – 12</u>	
	10. Building Unbreakable Processes – Order Speaker: Rhianna Campbell	Costa Del Sol ABCDE
	11. Service Above Self: Growing Through Giving - Legacy Speaker: Melissa Prandi MPM® RMP®	Costa Del Sol FGH



Schedule of Events - Wednesday

	12. Tenant Rights, Housing as a Right & Emerging National Issues Speakers: Tyler Craddock and Troy Garrett, NARPM®	Costa de la Luna 5-7
11:30 am – 12:50 pm	Lunch	Costa Del Sol ABCDE
1:00 pm – 2:15 pm	General Session: HUD Under Secretary (or How I Came to Love Section 8) - Impact Speaker: Doug Rice – Special Policy Advisor HUD	Costa Del Sol ABCDE
2:25 pm – 3:15 pm	Pick Your Progress: <ul style="list-style-type: none"> • Networking (Solving Pain Points) • Masterminding (Think, Pair, Share) • Vending (Improving Your Business) 	Costa Del Sol ABCDE Costa Del Sol FGH Costa de la Luna 1-4 and Foyer
3:15 pm – 4:00 pm	Coffee/Snack Break with Vendors	Costa de La Luna 1-4
4:00 pm – 5:10 pm	Economic Forecast: “After the Dust Settles: What’s Next for Rental Demand?” Speaker: Jeff Tucker, Sr. Economist, Zillow	Costa Del Sol ABCDE
5:15 pm – 7:15 pm	Networking Reception Sponsored by  extenteam	Legends Lawn and Valley Promenade

THURSDAY, APRIL 27, 2023

7:30 am	Registration Open	Costa Del Sol Foyer
8:00 am – 3:00 pm	Vendors Expo Opens	Costa de la Luna 1-4 and Foyer
7:30 am – 8:45 am	Continental Breakfast	Costa de la Luna Lawn

Schedule of Events - Thursday

- 8:45 am – 10:15 am** **General Keynote Session:** **Costa Del Sol ABCDE**
It's Not Time Management, It's Priority Management
Speaker: Barb Betts
Barb Betts is a successful REALTOR®, Broker and CEO, Educator, Speaker, and Trainer with a passion for all things Real Estate. She is known as an influencer in the Real Estate industry and is consistently known for impacting everyone that she speaks to. She has a passion for her industry and is highly involved at a local, state, and national level. She brings an honest, compassionate, and transparent approach. Her passion lies in sharing with others her best practices, successes (and failures) in selling real estate, running a brokerage, and figuring out how to keep it all balanced. In her spare time, you can find her spending time with her family, traveling or enjoying a good glass of Cab somewhere!
- 10:15 am – 10:45 am** **Refreshment Break with Vendors** **Costa de La Luna**
- 10:45 am – 11:35 am** **Workshop Sessions 13 – 15**
- 13. How to Add Google Reviews to Add More Doors – Impact** **Costa Del Sol ABCDE**
Speaker: Adam Willis
- 14. Competitor or Consolidator? What Acquiring Companies Are Looking For – Legacy** **Costa Del Sol FGH**
Speakers: Jennifer Stoops MPM® RMP®, Matthew Whitaker, and Andrew Propst MPM® RMP®
- 15. Elevating the Owner Experience to Increase Profit & Improve Retention – Profit** **Costa de la Luna 5-7**
Speaker: Matthew Kaddatz



Schedule of Events - Thursday

11:35 am – 12:35 pm	Lunch with Vendors	Costa Del Sol ABCDE
12:40 pm – 1:30 pm	<u>Workshop Sessions 16 – 18</u>	
16. Strategies to a Stellar Listing Presentation – Sales	Speaker: Mike Connolly RMP®	Costa Del Sol ABCDE
17. HOA Panel – Profit	Speakers: Kelli Tollifson MPM® RMP®, Jarrett Lau, Scott Brady	Costa Del Sol FGH
18. Big Changes with a Few Letters: How the NARPM Designations Can Improve Your Business – Impact	Speakers: Melissa Sharone MPM® RMP®, DD Lee MPM® RMP®	Costa de la Luna 5-7
1:35 pm – 2:30 pm	Pick Your Progress: <ul style="list-style-type: none">• Networking (Solving the Pain Points)• Masterminding (Think, Pair, Share)• Vending (Improving Your Business)	Costa Del Sol ABCDE Costa Del Sol FGH Costa de la Luna 1-4 and Foyer
2:30 pm – 2:50 pm	Refreshment Break	Costa Del Sol ABCDE
2:50 pm – 3:50 pm	Closing Keynote Session: How to Prepare for 5 Great Years in Property Management Speaker: Marc Cunningham RMP®	Costa Del Sol ABCDE



NARPM® Antitrust



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

NARPM®

Antitrust Guidelines

Association Meetings – To minimize the possibility of antitrust problems at association gatherings, the following guidelines should be followed at all meetings of the Board of Directors and committees, as well as all association-sponsored conventions, trade shows, training seminars, conferences, and task force and working group sessions.

- **DO NOT** discuss your prices or competitors' prices with a competitor (except when buying from or selling to that competitor) or anything which might affect prices such as costs, discounts, terms of sale, or profit margins.
- **DO NOT** agree with competitors to uniform terms of sale, warranties, or contract provisions.
- **DO NOT** agree with competitors to divide customers or territories.
- **DO NOT** act jointly with one or more competitors to put another competitor at a disadvantage.
- **DO NOT** try to prevent your supplier from selling to your competitor.
- **DO NOT** discuss your future pricing, marketing, or policy plans with competitors.
- **DO NOT** discuss your customers with your competitors.
- **DO NOT** make statements about your future plans regarding pricing, expansion, or other policies with anti-competitive overtones. Do not participate in discussions where other members do.
- **DO NOT** propose or agree to any standardization, the purpose of which is anti-competitive, e.g., to injure your competitor.
- **DO NOT** attend or stay at any informal association meeting where there is no agenda, no minutes are taken, and no association staff member is present.
- **DO NOT** do anything before or after association meetings, or at social events, which would be improper at a formal association meeting.
- **DO NOT** interpret or enforce the association's Code of Ethics without direction from the leadership.
- **DO NOT** regard compliance with the association's Code of Ethics as justification for anti-competitive communications or actions.
- **DO NOT** represent that the association prohibits or limits advertising, marketing or solicitation other than as the law authorizes prohibitions or limitations.
- **DO NOT** issue any document or communication on behalf of the association unless with proper authorization.
- **DO** send copies to an association staff member of any communications or documents sent, received, or developed by you when acting for the association.
- **DO** alert every employee in your company who deals with the association to these guidelines.
- **DO** alert association staff and legal counsel to anything improper.
- **DO** be conservative. If you feel an activity might be improper, ask for guidance from association staff or legal counsel in advance.



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Strength in
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Enter to Win the 2023 NARPM® PAC Sweepstakes

The NARPM® PAC Trustees have launched the 2023 NARPM® PAC Sweepstakes to support the NARPM® PAC. We are now selling entries. With your support, the NARPM® PAC can be in a strong position to support the election of candidates who understand the residential property management industry and are receptive to our concerns. And you can win some cash.

Prizes are:

1st Prize: \$2,000; 2nd Prize: \$500; 3rd Prize: \$250

Drawing will be held during the 2023 NARPM® Convention & Trade Show.

\$25 PAC investment = 1 entry

\$100 PAC investment = 5 entries



Enter by filling out the form, found at

[https://www.narpm.org/docs/legislative/sweepstakes/NARPM Sweepstakes investment card.pdf](https://www.narpm.org/docs/legislative/sweepstakes/NARPM_Sweepstakes_investment_card.pdf)

Email to: info@narpm.org or

Mail to: NARPM PAC Sweepstakes, c/o NARPM, 1403 Greenbrier Parkway, Suite 150, Chesapeake, VA 23320. Must be received via mail or email by September 30, 2023.

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Bringing Communities of Support to Students



Jaminsky, a senior in high school, is ALL IN for building relationships to help students like himself succeed in the classroom and beyond. Jaminsky was connected to his Communities In Schools® (CIS®) site coordinator, Mrs. Montgomery, during his freshman year of high school. Moving to a new town and attending a new school was an adjustment for Jaminsky, but Mrs. Montgomery was there to encourage and support him every step of the way. Jaminsky wanted to share his story because he recognized the impact CIS had on his life and that of other students. “Mrs. Montgomery made me realize that whether I’m a new student or not, I could find a place at this school. She’s my second mother, and I love the fact she cares about every student. As a senior who’s seen everything, what she’s done for me and other kids at this school has just been an amazing thing to be a part of. [Learn more about students like Jaminsky at CommunitiesInSchools.org](#)

Communities In Schools is thrilled to have been chosen as NARPM’s Past Presidents’ Charity for 2023! [Donate now using the QR code!](#)



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