



National Association of Residential Property Managers

Chapter Certificate of Compliance Checklist

Due December 1, 2009

PURPOSE: NARPM® must ensure that chapters are viable entities, capable of delivering the services expected by members of the Association. Chapter leadership must be accountable for their fiduciary and legal duties. This form can be downloaded in form fill edition at <http://www.narpm.org/chapter-services/support-services.html> and click on 2009 Chapter Certificate of Compliance

The undersigned officers of the NARPM® San Diego Chapter certify that the chapter completed this Certificate of Compliance and submitted the required documents as noted on this certificate.

GOVERNANCE REPORTING	
1.	Attach a list of the names and positions of the upcoming Board of Directors and committee chairs for the Chapter (Must be submitted to reach chapter compliance)
2.	Have chapter bylaws changed this year? Y ☐ N ☒ If yes, attach copy to this report and highlight changes. (Must be submitted to reach chapter compliance)
3.	Have chapter articles of incorporation changed this year? Y ☐ N ☒ If yes, attach copy to this report and highlight changes. (Must be submitted to reach chapter compliance)
4.	Attach copies of minutes for each Board of Directors meeting. Chapters are required to meet and maintain corporate minutes and other records as designated by state law and chapter bylaws. (Must be submitted to reach chapter compliance)
5.	Chapter officers assume their respective offices: January 1 ☒ Other: Specify
6.	Date of fiscal year: Calendar year ☒ Other: Specify
7.	The chapter maintains a minimum membership of seven (7) NARPM® Professional/Support Staff members. Y ☒ N ☐ (Must be maintained to reach chapter compliance)
8.	Does the chapter maintain a FDIC bank account in the chapter's corporate name Y ☒ N ☐ (Must be submitted to reach chapter compliance) Name of Banking Institution: <u>Union Bank of California</u>
9.	The chapter has filed a Corporate Annual Registration Report/Renewal for the state in which it is registered for this calendar year? *Send NARPM® an up to date copy of corporate annual registration report/renewal (Must be submitted to reach chapter compliance) Y ☒ N ☐ If not required check here ☐ Other reason:
10.	Effective 2010, local/state chapter Presidents, or their designee, must participate in a minimum of three of the quarterly Regional conference calls. In 2009, did your chapter participate in these calls? Y ☒ N ☐

CHAPTER FINANCIAL REPORTING	
11.	Attach copy of financial statement for current year. (Must be submitted to reach chapter compliance)
12.	Attach copy of proposed annual budget for the following year. (Must be submitted to reach chapter compliance)
13.	Attach copy of federal tax return. (Must be submitted to reach chapter compliance) If no return attached: Not required ☐ Other reason <i>In process of filing</i>
14.	Beginning in 2008, small tax-exempt organizations that previously were not required to file returns risk losing their tax-exempt status if they do not file an annual electronic notice (e-Postcard) form 99-N. (more information can be found at www.irs.gov/charities). Did the chapter file notice? Y ☐ N ☒ If no, why not:

CHAPTER PLANNING	
15.	Attach a copy of chapter's annual calendar of events for the following year.
16.	The Chapter President-Elect attended the training sessions at the national leadership training session prior to taking office. Y ☐ N ☒ If no, state why not:
17.	Did chapter communicate at least four times during the year with members? Y ☒ N ☐ If yes, attach one copy of the communications chapter had with the members. This can be electronic or printed. If the chapter submitted the Chapter Excellence application check Yes and documentation will not be required. Y ☐ N ☐ If no, state reason why not:
18.	Did chapter sponsor/participate in effective educational programs for NARPM® members affiliated with the chapter during certification year. This can be designation class or local classes that have special speakers. For state/regional chapters, education can be part of their state/region convention. Y ☒ N ☐ If yes, attach one copy of brochure or flier. If the chapter submitted the Chapter Excellence application check Yes and documentation will not be required. Y ☐ N ☐ If no, state reason why not:
19.	The chapter is using the Chapter Leader section of NARPM.org(http://www.narpm.org/chapter-services/) : Y ☒ N ☐ If no, why not:
20.	The chapter website is kept up to date? Y ☐ N ☒ If no, when will it be updated? <i>currently working on development</i>
21.	The chapter is interested in looking at a website supported by NARPM®: Y ☒ N ☐ Contact persons name and number: <i>Richard Greenwood</i>
22.	The chapter filed for the current year Chapter Grant: Y ☐ N ☒ Check here if you would like more information on grants: ☐ <i>The purpose of the grant is to strengthen and grow chapter membership through education and networking opportunities.</i>

Other items:

23. Rate the health of the chapter (1 - 10, 10 being highest)

a. If answer is 7 or less, what barriers does the leadership face in getting the chapter going?

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b. If answer is 7 or less, what resources would be helpful from national (i.e.: Speakers, mentoring, etc.)

c. If answer is 8 or above, what are the cool things the chapter is doing that other chapters might like to hear about?

Chapter Officers' Signatures Certifying Review and Approval of Chapter Certification:

2009 Jennifer Newton
Current Certification Year President/Date

2010 President: Jennifer Newton
Current Certification Year Incoming President/Date

2011 President: Steve Pollack

CHAPTER RE-CERTIFICATION REQUIREMENTS

The certification requirements were developed to maintain fair, specific procedural standards for the chapters and to protect the legal accountability of the national association. The NARPM® Board of Directors determines each chapter's recertification status after consideration of recommendations submitted by the Regional Vice President and the Membership Committee.

Submission Requirements

- Certificate of Compliance signed by the Chapter President and President-Elect/Vice President serving in Current Certification Year.
- Supporting materials as requested.

2010 Board of Directors and Committee Chairs

San Diego Chapter of NARPM

President	Jennifer Newton
Vice Pres/Pres Elect	Steve Pollack
Treasurer	Pam Neillo
Secretary	Mavis Ivane
Technology Chair	Richard Greenwood
Legislative Chair	Bob Davies
Membership Chair	Rebecca Granger
Education Chair	Tammy Bryant

SD CHAPTER of NARPM

BOARD OF DIRECTORS MEETING MINUTES

February 17, 2009

The Board of Directors of SD Chapter of NARPM met via conference call on **February 17, 2009**. Board members in attendance were Jennifer Newton (President), Mavis Ivane (secretary) & Pam Neillo (Treasurer). The meeting was called to order at 1:00pm and the following items were discussed and / or decided:

Minutes This being the first board meeting of 2009, there were no minutes to approve.

President's Report

- We are seeing a continued growth in the chapter with attendance increasing each month. Ideas were discussed on how to generate more interest on the part of members to participate on the board or serving on a committee. Jennifer will speak with our Regional VP as well as other NARPM members in leadership to determine what has been successful in other chapters.
- Continuing to provide valuable workshops and speakers seems to be the key to increased attendance. We have received very positive feedback after each meeting – let's keep up the good work!
- We have successfully secured the meeting rooms at the San Diego Association of Realtors for our monthly meetings at NO COST TO THE CHAPTER! We have found a good caterer that will provide lunch each month at a cost of \$8-\$10/head.

Treasurer's Report

- Treasurer, Pam Neillo, reported a bank balance of \$2733.05.

Open Discussion

- A discussion ended the meeting with ideas on how to grow the membership and reach out to other property managers ... we need to find a Membership Chair. Board members agreed to canvas our next meeting in hopes of finding an interested party.

There being no further business to come before the Board meeting was adjourned at 1:25 pm..

Submitted by:

Mavis Ivane, Secretary

Minutes of San Diego Chapter NARPM Board Meeting
May 12, 2009
Submitted by Mavis Ivane, Secretary

BOARD MEETING

Meeting was called to order at 12:00 pm at Sammy's Restaurant in San Marcos by President Jennifer Newton. Present were: Jennifer Newton, Pam Neillo (Treasurer), and Mavis Ivane (Secretary)

- Treasurer's report was given and the balance as of 4/13/09 is: \$2928.92.
- There was a discussion of the remaining meetings. They are as follows:

June 17, 2009 DRE Compliance Issues, no speaker has been finalized, so an alternate topic and speaker may be chosen

July, NO MEETING

August 29, 2009, "Get a Life" with Tony Drost, National Board member of NARPM as the speaker

Sept. 16, 2009 "In The Trenches" round table, or if the DRE is not presented in June, it will be done in Sept.

Oct. NO MEETING, National convention will be held Oct. 21 to 24 in Orlando FL

Nov. 18, 2009, vendor appreciation and convention wrap up

Dec. NO MEETING

There was a discussion on membership. There are a lot who are attending without becoming members. Most chapters limit the number of times someone can attend without becoming a member and we feel that two times is sufficient for our chapter.

We also discussed officers, we need more people to step up and take an active role in the chapter and to support it in order to keep it going. Jennifer will talk to some about becoming an officer.

Meeting adjourned at 1:15 pm.

SD CHAPTER of NARPM

BOARD OF DIRECTORS MEETING MINUTES

August 19, 2009

The Board of Directors of SD Chapter of NARPM on April 19, 2009 at Denny's in Rancho Bernardo. Board members in attendance were Jennifer Newton, Mavis Ivane & Pam Neillo. The meeting was called to order at 11:40 a.m. and the following items were discussed and / or decided:

Minutes Minutes were approved from May, 2009 Board meeting.

President's Report

- The Chapter is still in need of volunteers to serve on the 2010 Board. It was agreed that we would split up the membership contacts equally and call each member to solicit participation. Jennifer has spoken to a few members that are employees as opposed to company owners. General feedback has been that it is difficult to manage time away from the office when they are accountable for their time with their employers. Mavis concurred with this observation and suggested that we might want to focus our solicitations to company owners or independent contractors.

Treasurer's Report

- Treasurer, Pam Neillo, reported a bank balance of \$3832.88.

Open Discussion

- The Board decided that our December meeting would be a Vendor Appreciation format. All Vendor Members attending would have the opportunity to address the group for 7 minutes, allowing them to promote their services to the group. Business cards will be put in a "hat" and we will randomly draw vendors for an opportunity to speak.
- Chapter meeting attendees have indicated a high level of interest in round table or panel of expert type formats. Great feedback is received when there is more interaction from the group, not just a speaker. We agreed it would be a good idea to begin forming the 2010 calendar as a way to get more involvement from the group and, hopefully, more volunteers!

Adjourned No further business was addressed and the meeting adjourned at 1:00 pm

Submitted by Mavis Ivane, Secretary



STATEMENT OF ACCOUNTS

UNION BANK
RANCHO BERNARDO 076
PO BOX 512380
LOS ANGELES

CA 90051-0380

Page 1 of 1

Statement Number: 0760046817

12/1/09 - 12/31/09

H

Telephone Banking

For 24-hour Automated Direct Service

800-238-4486

800-826-7345(TDD)

Representatives are available
from 6 am to 11 pm

To open additional accounts,
or apply for loans, call your
banking office at 858-485-5831

Visit us at unionbank.com

Thank you for banking with us
since 2008

CY30Z 080000 0181275-230483 747239

THE NATIONAL ASSOCIATION OF RESIDENTIAL
16516 BERNARDO CENTER DR STE 200
SAN DIEGO CA 92128-2552

■ Go green with online statements instead of paper! Call your banker today to make the switch.

BASIC BUSINESS CHECKING SUMMARY

Account Number: 0760046817

Days in statement period: 31

Balance on 12/1	\$	4,038.86
Additions		920.00
Subtractions		-243.60
Checks		-243.60
Balance on 12/31	\$	4,715.26

Statement Average Ledger Balance \$ 4,375.76

We waived your service charge this statement period.

Additions	Date	Description	Reference	Amount
	12/18	OFFICE DEPOSIT # 0000285034	75347566	\$ 820.00
	12/18	OFFICE DEPOSIT # 0000682878	75347564	100.00
Total				\$ 920.00

Checks	Number	Date	Reference	Amount	Number	Date	Reference	Amount
	2022	12/22	04807802	\$ 243.60				

Information and Banking Office Services

For each monthly statement period your account includes:

- Unlimited free Information Services calls to 24-hour Automated Direct Service
- 10 free banking office deposits

For the current monthly statement period you made:

2 banking office deposits.

Your account was not charged for information and banking office services during the statement period.



8

State of California
Secretary of State



*Paid 1/21/10
by Pam*

STATEMENT OF INFORMATION
(Domestic Nonprofit, Credit Union and Consumer
Cooperative Corporations)
Filing Fee: \$20.00. If amendment, see instructions.

IMPORTANT — READ INSTRUCTIONS BEFORE COMPLETING THIS FORM

This Space For Filing Use Only

1. **CORPORATE NAME** (Please do not alter if name is preprinted.)

N

San Diego Chapter of the National Association of Residential Property Managers

DUE DATE:

COMPLETE PRINCIPAL OFFICE ADDRESS (Do not abbreviate the name of the city. Item 2 cannot be a P.O. Box.)

2. STREET ADDRESS OF PRINCIPAL OFFICE IN CALIFORNIA, IF ANY	CITY	STATE	ZIP CODE
16516 Bernardo Center Drive, Suite 200	San Diego	CA	92128

3. MAILING ADDRESS OF THE CORPORATION, IF REQUIRED	CITY	STATE	ZIP CODE
same			

NAMES AND COMPLETE ADDRESSES OF THE FOLLOWING OFFICERS (The corporation must have these three officers. A comparable title for the specific officer may be added; however, the preprinted titles on this form must not be altered.)

4. CHIEF EXECUTIVE OFFICER/President	ADDRESS	CITY	STATE	ZIP CODE
Jennifer Newton	16516 Bernardo Center Drive, #200	San Diego	CA	92128

5. SECRETARY/	ADDRESS	CITY	STATE	ZIP CODE
Mavis Ivene	2653 Roosevelt Street	Carlsbad	CA	92008

6. CHIEF FINANCIAL OFFICER/Treasurer	ADDRESS	CITY	STATE	ZIP CODE
Pam Neillo	16959 Bernardo Center Drive, #200	San Diego	CA	92128

AGENT FOR SERVICE OF PROCESS (If the agent is an individual, the agent must reside in California and Item 8 must be completed with a California street address (a P.O. Box address is not acceptable). If the agent is another corporation, the agent must have on file with the California Secretary of State a certificate pursuant to Corporations Code section 1505 and Item 8 must be left blank.)

7. **NAME OF AGENT FOR SERVICE OF PROCESS**

Jennifer Newton

8. STREET ADDRESS OF AGENT FOR SERVICE OF PROCESS IN CALIFORNIA, IF AN INDIVIDUAL	CITY	STATE	ZIP CODE
16516 Bernardo Center Drive, Suite 200	San Diego	CA	92128

DAVIS-STIRLING COMMON INTEREST DEVELOPMENT ACT (California Civil Code section 1350, et seq.)

9. ☐ Check here if the corporation is an association formed to manage a common interest development under the Davis-Stirling Common Interest Development Act and proceed to Items 10, 11 and 12.

NOTE: Corporations formed to manage a common interest development must also file a Statement by Common Interest Development Association (Form SI-CID) as required by California Civil Code section 1363.6. Please see instructions on the reverse side of this form.

10. ADDRESS OF BUSINESS OR CORPORATE OFFICE OF THE ASSOCIATION, IF ANY	CITY	STATE	ZIP CODE
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11. FRONT STREET AND NEAREST CROSS STREET FOR THE PHYSICAL LOCATION OF THE COMMON INTEREST DEVELOPMENT (Complete if the business or corporate office is not on the site of the common interest development.)	9-DIGIT ZIP CODE
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12. NAME AND ADDRESS OF ASSOCIATION'S MANAGING AGENT, IF ANY	CITY	STATE	ZIP CODE
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13. THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT.

1/21/2010

Jennifer Newton

President

DATE

TYPE/PRINT NAME OF PERSON COMPLETING FORM

TITLE

SIGNATURE

Accrual Basis

SD Chapter NARPM
Profit & Loss
January through December 2009

	Jan - Dec 09
Ordinary Income/Expense	
Income	
Monthly Chapter Meetings	6,410.04
Vendor Affiliate Annual Dues	758.00
Total Income	7,168.04
Expense	
Banking Fees	6.00
Business Expenses	
CALNARPM Contributions	200.00
Total Business Expenses	200.00
Chapter Meetings	
Luncheon Expense	3,454.79
Speaker Fees	319.20
Speaker Travel	362.78
Total Chapter Meetings	4,136.77
Total Expense	4,342.77
Net Ordinary Income	2,825.27
Net Income	2,825.27

SAN DIEGO CHAPTER OF NARPM

2010 BUDGET PROJECTIONS

Deposits

Luncheon receipts \$7,000

Chapter Grant \$ 500

Total Income \$7,500

Expenses

Supplies \$ 100

Badges \$ 150

Postage \$ 175

Luncheons \$3,800

Bank charges \$ 150

Speaker expense \$1,100

Total Expense \$5,475

Net Income \$2,025



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December SD NARPM Meeting



Host: Jennifer Newton

Location: San Diego Association of Realtors
4845 Ronson Court, San Diego, CA
[View Map](#)

When: Wednesday, December 16, 11:30am

Phone: 858-354-9415

COME AND CLOSE OUT 2009
WITH THE SAN DIEGO CHAPTER OF NARPM

LET'S SHOW OUR APPRECIATION TO
VENDOR-AFFILIATE MEMBERS
THIS WEDNESDAY, DECEMBER 16, 2009

Our format for December will provide an opportunity for valuable networking with other industry professionals, hearing from our affiliate members and providing them an opportunity to get to know our professional members as well.

To our professional members: if you know of a vendor that would benefit from joining our San Diego Chapter, one who provides a quality level of service, encourage them to join our local chapter as an affiliate in time for our December meeting.

Please join us for a light lunch and a great time of networking and happy holiday wishing!

PLEASE RSVP TO THIS INVITATION ...

Cost (lunch included): \$20 NARPM Members
\$30 non-NARPM Members

Questions: Jennifer Newton (858-354-9415); Pam Neillo (858-487-8519); Mavis Ivane (760-434-7373)

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March SD NARPM Meeting March 18th!



Host: Jennifer Newton

Location: San Diego Association of Realtors
4845 Ronson Court, San Diego, CA
[View Map](#)

When: Wednesday, March 18, 11:30am

Phone: 858-354-9415

Happy St. Patrick's Day!

Don't miss our March SD NARPM Meeting
Wednesday, March 18, 2009

Our March meeting will be sponsored by PAYLEASE

"Our mission is to streamline lease payments and collection while providing World Class Customer Service. PayLease has created a one-stop shop for all of your payment processing needs"

www.paylease.com

Welcome: Michelle Horneff-Cohen ? 2008/09 CALNARPM President visiting our chapter to provide us with a sneak peek at the upcoming CALNARPM conference to be held in San Francisco this April.

We have slotted the March meeting to be a **panel of our own local NARPM experts** who will be on hand to discuss topics important to our industry today:

One of the hottest topics of current times....

LEASING

*how have current economic conditions affected your leasing efforts and what are you doing to get properties rented?

*has your qualifying criteria changed in the last year and, if so, how?

*how can I get my owner to lower the rental price?

*what are the best techniques to overcoming objections when showing a property?

*where should i be advertising my available properties?

Technology

*discussion on current property management software and the user's experience

*hear from some of our techno-saavy members about office technology and various uses for scanners, copiers, cellphones and pda's,

*who is using direct deposit for owner payments and how has this impacted your operation?

*what options are available for automatic rental payments



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NOVEMBER MEETING OF SAN DIEGO NARPM CHAPTER



Host: Jennifer Newton

Location: San Diego Association of Realtors
4845 Ronson Court, San Diego, CA
[View Map](#)

When: Wednesday, November 18, 11:30am

Phone: 858-354-9415

THE SAN DIEGO CHAPTER OF NARPM
invites you to attend ...

WEDNESDAY, NOVEMBER 18TH
will be one of the MOST IMPORTANT MEETINGS OF
THE YEAR!

Come and hear from the
AUDIT DEPARTMENT OF THE DEPARTMENT OF
REAL ESTATE

Speaker: Danio Fajardo, Audit Manager for So
California

MR. FAJARDO will be providing insight into the audit process, how a company is selected for audit, what can you expect in the event of an audit as well as a review of some CASE STUDIES OF ACTUAL AUDITS and the results. There will be ample time for a question and answer period as well. Mr. Fajardo will also address the most common violations found during an audit and how you can avoid them! This is a TREMENDOUS OPPORTUNITY to gain valuable insight to one of the most important aspects of DRE licensing and responsibilities.

Your San Diego Chapter of NARPM is committed to insuring our meetings are packed with valuable information and education that makes a positive impact on how you conduct your business on a daily basis.

PLEASE RSVP TO THIS INVITATION EARLY
AS WE ANTICIPATE A FULL HOUSE! (click the button to
the right)

Cost (lunch included): \$20 NARPM Members
\$30 non-NARPM Members

Questions: Jennifer Newton (858-354-9415); Pam Neillo
(858-487-8519; Mavis Ivane (760-434-7373)

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Special Speaker

(18)



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SAN DIEGO CHAPTER OF NARPM



Host: Jennifer Newton

Location: San Diego Association of Realtors
4845 Ronson Court, San Diego, CA
[View Map](#)

When: Wednesday, August 19, 11:30am

Phone: 858 354 9415

August Meeting Reminder THE SAN DIEGO CHAPTER OF NARPM

featuring

TONY DROST

**Broker/Owner, First Rate Property Management,
Boise, ID**

Tony is a sought after speaker at NARPM National and Regional conventions

Presenting...

GET A LIFE!

...Increase your company's income, delegate and effectively plan

In 1995, Tony started First Rate Property Management which currently manages over 800 units. Over the years, Tony has applied what he has learned from other NARPM members and has increased his income exponentially. The higher income has created opportunities to hire more staff, which has lead to more delegation, better service for his owners and tenants and, the highlight of this workshop: A LESS STRESSFUL LIFE!

Special Speaker

WHAT YOU WILL LEARN: Tony will discuss more than 40 ways to increase income which can benefit you personally as well as your company!