

CHAPTER COMPLIANCE 2023

C008 GREATER DALLAS CHAPTER

Congratulations! Your NARPM 2023 Chapter Compliance Application form has been approved!

The chapter has met all recertification requirements and is fully certified.

Levels of Chapter Recertification

Full recertification

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

Chapter in Review (Amended 2022)

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

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

De-certification

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



CHAPTER COMPLIANCE 2023 ATTENDANCE REQUIREMENTS MET in 2022

C008 GREATER DALLAS

Compliance Question:

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

February 3, 2022 Attendee(s): Kristen Correa

June 1, 2022 Attendee(s): Mary Fran Mulcahy

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

October 20, 2022 Attendee(s): Mary Fran Mulcahy

November 16, 2022 Attendee(s): Chato Castillo; Mary Fran Mulcahy

Tax Return will be uploaded later.

Greater Dallas Chapter of NARPM - 2022 Tax Return Inbox x





Mary Frances Mulcahy, RMP®, TRPM, TRLS

10:58 AM (5 hours ago) 🌣



to quinn, Kristen, me, John, Chato, Russ, NARPM -

Hi Quinn. Thank you for calling the other day. The officer information you needed is below. Is there anything that you can provide us to send to NARPM for our compliance requirement until the return is filed?

I am traveling back to Dallas today, but you can reach me on my cell at 817-403-2116.

2022 Secretary: Chato Castillo 13012 Forest Glen Ln. Balch Springs, TX 75180

2022 Treasurer: John Teixeira 4105 S Bowen Rd Arlington, TX 76016

2022 President: Kristen Correa 415 Beverly Dr Keller Tx 76248 817-422-3322

Texas law requires all license holders to provide the Information About Brokerage Services form to prospective clients.

CLICK HERE if you would like to schedule a call with me at your convenience!



Mary Fran Mulcahy, RMP®, TRPM, TRLS

REALTOR®

Blue Crown Properties

Texas License #0646984

13901 Midway Road, #102-127, Dallas TX 75244

p: 214.432.4116 dallas-ft worth

w: bluecrownproperties.com

e: maryfran@bluecrownproperties.com

Form 990-N

Electronic Notice (e-Postcard)

OMB No. 1545-2085

Department of the Treasury Internal Revenue Service

for Tax-Exempt Organization not Required to File Form 990 or 990-EZ

2021

Open to Public Inspection

A For the 2021 Calendar year, or tax year beginning 2021-01-01 and ending 2021-12-31

B Check if available
Terminated for Business
Gross receipts are normally \$50,000 or less

C Name of Organization: GREATER DALLAS CHAPTER OF
THE NTL ASSN OF RESDNTL PROP MGS INC
2611 Cross Timbers Road
Ste 100, FLOWER MOUND,
TX, US, 75028

E Website:
F Name of Principal Officer: KRISTEN CORREA
415 BEVERLY DR, KELLER,
TX, US, 76248

Privacy Act and Paperwork Reduction Act Notice: We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

Note: This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.

Franchise Tax

2022 Annual No Tax Due Report

Confirmation

You Have Filed Successfully

Please do NOT send a paper form

Since you are electronically reporting this tax, you will not receive a paper tax return in the mail for subsequent reports due. To keep you up-to-date and informed of due dates for this tax, we will send a courtesy e-mail reminder to you at the e-mail address on file for this account.

Print this page for your records

Submission ID: 59421270

Date and Time of Filing: 02/16/2022 12:24:52 PM

Taxpayer ID: 17527189843

Taxpayer Name: THE GREATER DALLAS CHAPTER OF THE NATIONAL ASSOCIA

Taxpayer Address: PO BOX 603 ARGYLE, TX 76226 - 0603

Entered By: Quinn Sowell

Email Address: quinn@p38enterprises.com **Telephone Number:** (940) 262-1106

IP Address: 45 131 192 213

Additional Reports		
Is this the reporting entity of a combined group?	No	
Do any of the entities in the combined group have a temporary business loss preserved?	No	
Will your total revenue be adjusted for the Tiered Partnership Election?	No	

No Tax Due Report		
SIC Code:	NAICS Code: 813910	
Accounting Year Begin Date: 01/01/2021	Accounting Year End Date: 12/31/2021	
Is this a passive entity as defined in Chapter 171 of the Texas Tax Code?		No
Is this entity's annualized total revenue below the no tax due threshold?		Yes
Does the entity have zero Texas Gross Receipts?		No
Is this entity a Real Estate Investment Trust (REIT) that meets the qualifications specified in section 171.0002(c)(4)?		No
Is this entity a New Veteran-Owned Business as defined in Texas Tax Code Sec. 171.0005?		No
Total Revenue:		\$12,159

Mailing Address

Street Address: PO BOX 603

City: ARGYLE

State: TX

Zip Code: 76226 - 0603

21p Code. 76226 - 0603

Country: USA

Public Information Report

Taxpayer

Taxpayer Name: THE GREATER DALLAS CHAPTER OF THE NATIONAL ASSOCIA

Taxpayer Number: 17527189843

SOS File Number or Comptroller File Number: 0131771701

Changes from previous year?: Yes

Mailing Address: PO BOX 603

ARGYLE, TX 76226-0603

Principal Office:
Principal Place Of Business:

Officers, Directors, Managers, Member or General Partner

Name: KRISTEN CORREA

Title: PRESIDENT Director? No Term Expiration Date:

Mailing Address: 415 BEVERLY DR

KELLER, TX 76248

Name: CHATO CASTILLO

Title: SECRETARY Director? No Term Expiration Date:

Mailing Address: 5204 WOODSBORO DR

BALCH SPRINGS, TX 75180

Name: JOHN TEIXEIRA

Title: TREASURER Director? No Term Expiration Date:

Mailing Address: 128 MONTICELLO DR

MANSFIELD, TX 76063

Owned Entity(s)

Owned Entity(s) State of Formation TX SOS File # Percentage of Ownership

None entered.

Owners

Owned Entity(s) State of Formation TX SOS File # Percentage of Ownership

None entered.

Registered Agent and Office

Agent: SHIRLEY A JOHNSON

Office: 2611 CROS TIMBERS ROAD, STE. 100 FLOWER MOUND, TX 75028-0603

Declaration Statement

I declare that the information in this document and any attachments is true and correct to the best of my knowledge and belief, as of the submission date, and that a copy of this information has been mailed to each person named in this section who is an officer, director or manager and who is not currently employed by this, or a related, corporation or limited liability company.

Print Return to Menu File for Another Taxpayer

texas.gov | Texas Records and Information Locator (TRAIL) | State Link Policy | Texas Homeland Security | Texas Veterans Portal

Glenn Hegar, Texas Comptroller • Home • Contact Us

Privacy and Security Policy | Accessibility Policy | Link Policy | Public Information Act | Compact with Texans



2023 Budget

Income:		<u>1-01-23</u>
	Current Bank Balance	\$5,770
	Affiliate Membership Dues	
	Silver: 10 @ \$250	\$2500
	Gold: 10 @\$500	\$5000
	Annual Member Dues (Renewals) 50x\$100	\$ 5000
	Misc Income from Events	\$3600
	Chapter Incentives/Regional Proceeds	\$ 1500
	NARPM Marketing Grant:	\$ 500
	Education Classes:	\$ 1000
	Total	\$24870
Expense		\$24870
Expense		\$ 500 per year
Expense	s:	
Expense	s: Accounting and Legal	\$ 500 per year
Expense	s: Accounting and Legal QB -	\$ 500 per year \$ 385.00
Expense	s: Accounting and Legal QB - Educational Classes	\$ 500 per year \$ 385.00 \$ 500
Expenses	s: Accounting and Legal QB - Educational Classes Holiday Party:	\$ 500 per year \$ 385.00 \$ 500 \$ 2000
Expenses	S: Accounting and Legal QB - Educational Classes Holiday Party: Officer Travel - Convention & Leadership:	\$ 500 per year \$ 385.00 \$ 500 \$ 2000 \$ 5000 -
Expenses	Accounting and Legal QB - Educational Classes Holiday Party: Officer Travel - Convention & Leadership: Operating Expenses:	\$ 500 per year \$ 385.00 \$ 500 \$ 2000 \$ 5000 - \$ 200

Total \$24085

Greater Dallas Chapter of NARPM

Profit and Loss January - December 2022

	TOTAL
Income	
National	0.00
Leadership Attendance	-2,651.93
Total National	-2,651.93
Sales	17,567.55
Total Income	\$14,915.62
GROSS PROFIT	\$14,915.62
Expenses	
Contract Services	0.00
Accounting Fees	499.57
Outside Contract Services	500.00
Total Contract Services	999.57
Leadership Expense	2,841.74
Marketing Expense	18,372.38
Meals	794.70
Meetings	800.00
Operations	0.00
Books, Subscriptions, Reference	2,403.96
Total Operations	2,403.96
QuickBooks Payments Fees	408.81
Travel	0.00
Conference, Convention	745.00
Total Travel	745.00
Uncategorized Expense	337.67
Total Expenses	\$27,703.83
NET OPERATING INCOME	\$ -12,788.21
NET INCOME	\$ -12,788.21



Marketing for Residential Property Management

Are you spending your marketing dollars wisely?

Do you know the reach and return on your marketing efforts?

Are you unsure of how to market to your client & customer base?

Are you striving for a designation?! RMP or MPM?

Whether you are new to the business or a seasoned pro, this course will help you hone your knowledge and skills in the area of marketing.

Time: 9am - 4pm CENTRAL Begin Date: January 18, 2022

Location: The Clubs of Prestonwood 15909 Preston Rd., Dallas, TX 75248

Happy hour to follow sponsored by your 2022 affiliate members

In this course you will develop a mission statement (or refine yours if you have one) and decide upon a related marketing goal to help guide your business. You will examine branding and the importance of knowing how your clients and customers think, feel, and behave. Time will be spent delving into various forms of media and advertising channels. You will learn about the importance of tracking and measuring outcomes that are key to your marketing efforts!



Instructor: Brian Birdy, MPM® RMP®

MUST REGISTER VIA NARPM!

This is an important step!

https://bit.ly/3EfLyfk

Did you know? Pricing of NARPM classes varies based on membership and designation status? And members receive a 5% discount on course fees when you register for 2 or more courses at a time. *Discount doesn't apply to Ethics courses nor can it be combined with another offer

If you have questions about education classes email: educationinfo@narpm.org

Sharing is caring! Please share this flier with other property managers you know, members and non-members.

RESOLVING CONFLICT When you'd rather block & delete em

Conflict in the workplace is inevitable. In this interactive session, participants will ID sources of conflict, take a look at the choices made when dealing with difficult people, and recognize the various roles in the problem encounter arena. By learning how to counteract typical tactics difficult people use, participants will be empowered to gracefully and professionally move past the drama and get on with business!



Featured speaker **Rhonda Hamilton** is a Life-Success and People-Smarts Expert from right here in the great state of Texas. She's an in-demand speaker and communciation skills expert who champions others to live a bigger and better life!

Feb 17th Meeting 11:30-1pm

The Clubs of Prestonwood – The Creek 15909 Preston Rd, Dallas, TX 75248

RSVP via email by 2/15/2022 NARPMdallas@gmail.com

This event is free to paid members & affiliate members \$25 for guests – please bring a check or we can invoice you or we have Zelle





This event has ended.

X

Need to make some updates? Edit event



Apr 20

NARPM Dallas April Meeting ~ All Star Panel & PM Challenges

Featured in 2 collections

The National Association of Residential Property Managers ~ Greater Dallas Chapter ~ Panel of PM Pros & Industry Challenges

By **NARPM Dallas**

MARPH Greater Dallas

68 followers

Follow

Sales Ended

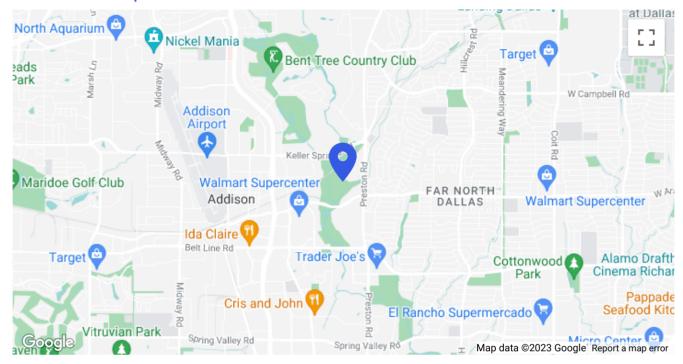
Details



Location

The Clubs of Prestonwood - The Creek 15909 Preston Road Dallas, TX 75248





How to get there



About this event

* ALL * STAR * PANEL *

Hear from THE BEST in the industry on hot topics like the importance of education & designations, owner relations, tenant selection, home maintenance, evictions & MORE!

But wait...

There's more!

ALSO

Sales Ended

Not to be a meanie, but~ this is real estate industry & our vendors only. No party crashers;)

RSVP right here via Eventbrite ~ *Sharing is caring!*

Upcoming events: Dallas NARPM 2022 Schedule of Events

Membership Application: 2022 Membership Application

You must be a member of NARPM to join your local chapter here in Dallas

Affiliate Application: 2022 Affiliate Application

The National Association of Residential Property Managers ~ The Greater Dallas Chapter

Unfamiliar with NARPM® provides resources for residential property management professionals who desire to learn, grow, and build relationships.

Visit us online!

Email us at NARPMdallas@gmail.com if you need more info!



Forms











National Association of Residential Property Managers United States Events Texas Events Things to do in Dallas, TX

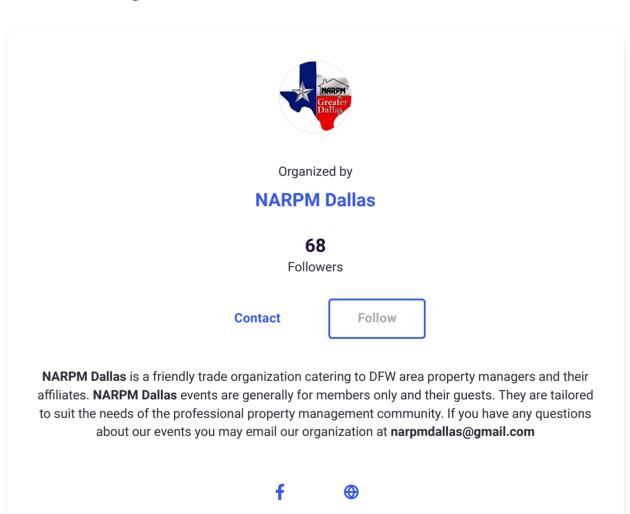
Dallas Networking Dallas Business Networking #property

#propertymanagement #real_estate #professional_development

#real_estate_training #property_investment #property_investing

#real_estate_class #property_management #realtor_education

About the organizer



Sales Ended

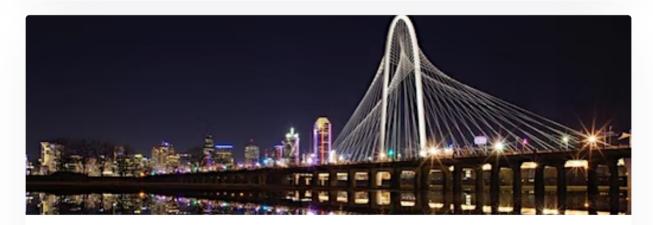
More collections that feature this event



NARPM Dallas Events 2022

No upcoming events

2022 NARPM Dallas Schedule of Events. Our motto this year is Value in our Collective Genius! We hope to see you as these events are sure to make you not only a better PM but a better human.



NARPM Dallas Events 2023

2 upcoming events

2023 Events!



Sales Ended

5/19 NARPM Meeting Agenda

<u>11:40 - Mary Fran</u> Good morning to all of our members and affiliates.

Members and pro visitors - the first 10-15 minutes of today's agenda is designed for you to get to know the affiliates or the vendors here today.

While everyone mingles, I'll read the required missions statements.

11:45 - Mary Fran - Proceed to Mission/ AntiTrust/ Code Of Ethics

I know you are all super excited to hear me read the NARPM Mission Statement, Antitrust Statement, and Code of Ethics before each meeting. Let's get this out of the way!

<u>NARPM'S</u>[®] <u>mission</u> is to provide resources for residential property management professionals who desire to learn, grow, and build relationships.

<u>Mission of the Greater Dallas Chapter</u> is to be a place where local relationships will be cultivated for professional property managers and the chapter's affiliate members.

The reading of Antitrust statement is required per the settlement agreement of the antitrust suit against NARPM. Simply put, this is the equivalent of having to write "I will not discuss fees" 100 times on the blackboard! And I think we all remember the blackboard!

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.

Article 8: COMMITMENT TO FIRM

The Property Manager shall act in the best interests of his or her property management Firm.

STANDARDS OF PROFESSIONALISM

- 8-1 The Property Manager shall not have any undisclosed conflict of interest with his or her Firm. If a conflict or potential conflict should arise, the Property Manager shall notify his or her Firm immediately.
- 8-2 The Property Manager shall not receive any form of compensation, rebates, or any other benefits without full disclosure to his or her Firm.
- 8-3 The Property Manager may not take or use any proprietary documentation, including but not limited to Client/Tenant lists, during or after his or her relationship with a Firm without express written consent from the Firm.

<u>11:45 - Mary Fran</u> - Welcome Dallas Members & Affiliates. Announce upcoming events and reference sheet at sign in table. Kristen is sorry she could not make it today.

Welcome Dallas members and affiliates and guests. We are so excited to have everyone here IN PERSON for our first meeting of 2022! We hope everyone has been staying well and persevering! We are happy to have our affiliates, our members and our visitors today. Please meet and get to know each affiliate to mark your bingo card. At the end of the meeting we will have a drawing for a prize! This year's motto is Value in our Collective Genius. We hope to learn, grow, network together - more on that in a moment. Please!

Grab some lunch and we will proceed momentarily!

12:00 - Mary Fran - Recognize each affiliate member - Gold 1st 2-3 minutes; Silver next 1-minute or less

12:10 - Mary Fran - Intro Speaker - Rhianna Campbell

Our guest speaker today is Rhianna Campell, real estate business coach, investor, and entrepreneur. After building, growing, then selling her multimillion dollar business, Ms. Campbell started consulting other professionals around the world to find business freedom. Drawing on her real estate experience, Ms. Campbell is going to talk to us about the signs of burnout and how to manage the stress that leads to burnout. We all like to make jokes about our property management adventures, but the reality is that having angry tenant, angry owners, and days where it feels like you can't make anyone happy, takes a toll.

Please welcome Rhianna Campbell!

1:00 - Mary Fran - Thank you Rhianna! Just a reminder that our next event is June 24 at Petes' Dueling Piano Bar in Addison. We won't have any membership meetings over the summer, but plan on joining us in June and August for our Socials.

Have a great summer!



This event has ended.

Need to make some updates? Edit event



Oct 26

NARPM Dallas October Meeting ~ ADVANCED financing

Part of the NARPM Dallas Events 2022 collection

Dallas NARPM ~ Capital Concepts ~ Cary Donham ~ Smart Money Loans ~ ADVANCED Financing Strategies for Real Estate Investors

By **NARPM Dallas**

68 followers



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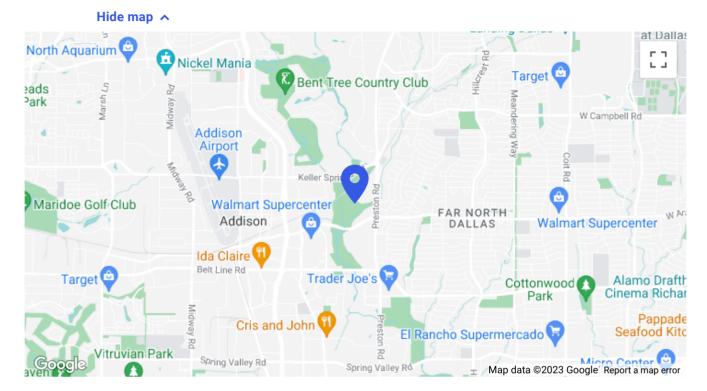
Sales Ended

Details



Location

The Clubs of Prestonwood - The Creek 15909 Preston Road Dallas, TX 75248



How to get there



About this event

JOIN US!

The National Association of Residential Property Managers Greater Dallas Chapter Hosts Capital Concepts ~ Cary Donham ~ Smart Money Loans!

A D V A N C E D Financing Strateies for Real Estate Investors

RSVP right here via Eventbrite

FREE to paid members & paid affiliates!

Sales Ended

Affiliate Application: 2022 Affiliate Application

Exclusive Event for NARPM Members, NARPM Affiliates & Guests of Members ONLY.

National Association of Residential Property Managers Greater Dallas Chapter







Tags

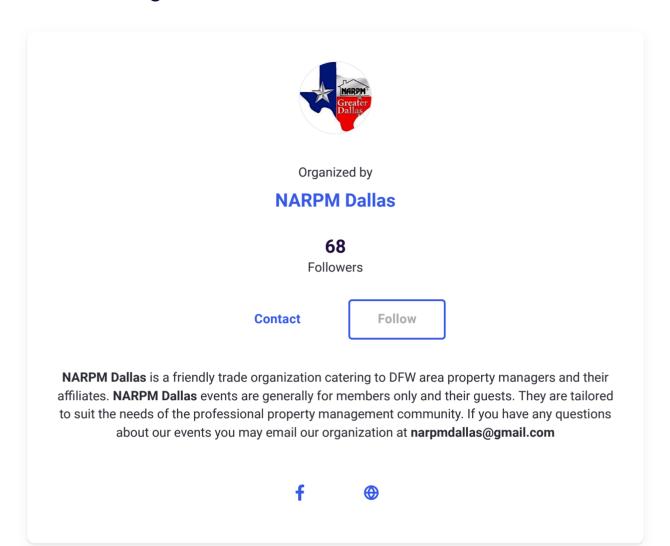
United States Events Texas Events Things to do in Dallas, TX

Dallas Networking Dallas Business Networking #realestate

#propertyinvestment #propertymanagement #realestateinvesting #real_estate

Sales Ended

About the organizer





© 2023 Eventbrite



MEETING MINUTES OF January 5, 2022 BOARD MEETING (via ZOOM)

- I. <u>Call to Order President.</u> Meeting called to order at 9:01 a.m.
- II. <u>Attendance via Zoom</u>. Attending the meeting were President Kristen Correa; President-Elect Mary Fran Mulcahy; Treasurer John Teixeira; Regional Amy Karns Hanson. Secretary Chato Castillo and Past President Sarah Bordelon were not present.

III. New Business.

- **A.** General Discussion. No general discussion this morning.
- B. <u>Budget Review and Bank Update</u>. General budget discussion. John is still working on the budget for 2022. Amy and Kristen reviewed the budget; John presented a budget and Kristen said we should reduce membership to ten; should we increase the leadership budget and is it only used by one person; but raising the leadership budget reduces the net income. Additional discussion and questions on making adjustments to the budget.
 - 1.Did anyone take the minutes to the bank? Does not appear so and Kristen will do it today, 1/5/2022.
 - 2. Square invoice sending not completed. Quickbooks invoicing is easy and John was able to send one. MF proposed using Quickbooks for email invoicing and using Square for taking remote payments.
 - 3.Kristen will pull all available grants and circulate them and we will then determine who will apply for what grants. Amy said you will need an updated budget for each grant application.

C. Admin Items.

- 1. Clubs at Prestonwood. Kristen to send final contracts for January and February.
- 2. <u>Quickbooks/Zelle/Square</u>. Kristen said that the next thing we want to do is invoice the entire membership in Quickbooks; Kristen sent a spreadsheet to all National members in Dallas; John asked if we wanted to send a communication to them; to be included with the emailed invoice, attach calendar or link to calendar on NARPM website;



include payment options. After invoices go out, wait a week and then do a mailout to all remaining unpaid members.

- D. Schedule, Speakers, Locations We have our entire schedule for 2022.
 - 1. <u>Calendar</u> Mary Fran to add all events through Dallas NARPM calendar and invite all board members via Zoom.
 - 2. Upcoming January 12th Event send an eventbrite for RSVPs. Make sure it's set up correctly.
 - 3. <u>Google Drive How it's organized</u> Everyone has access.
 - 4. <u>Emails and Dist List</u>. Does everyone know how to pull a membership directly from national? Instructions on how to pull a distribution list for National are in the drive. When you pull a list from National it's a live document; tell Kristen if we should do it another way; we should invite all of Dallas members to events; when we use this email list, we need to track who needs to be a member or not.
 - 5. <u>Social Media and Website</u> Kristen and Amy met to work on the Dallas NARPM site; need language on the home page.
 - 6. Members Discussed members.
 - 7. Affiliates List is in google drive.
 - 8. <u>NARPM National and State Updates</u>: Kristen said there are a few things that still are not posted state is September 19-22.
 - 9. <u>Boards like MetroTex, CCAR, Arlington news and calendars or co-op opps</u> We need to continue to monitor and update calendars from other organizations.
- E. <u>Succession Planning</u> Bill Sabino offered to help greet people and sign in; introduce them to people; allow potential members to attend one meeting before joining. Let's keep eyes and ears open for new board members.
- F. Who is willing to serve on committees 2022 or serve in 2023? Should be continuing to cultivate growth within the chapter.
- G. Open Discussion None.
- H. Adjournment. Meeting was adjourned at 9:55 a.m.



MEETING MINUTES OF February 9, 2022 BOARD MEETING (via ZOOM)

- I. <u>Call to Order President.</u> Meeting called to order at 9:02 a.m.
- II. <u>Attendance via Zoom</u>. Attending the meeting were President Kristen Correa; President-Elect Mary Fran Mulcahy; Treasurer John Teixeira; Secretary Chato Castillo; Past President Sarah Bordelon; and Regional Representative Amy Karns Hanson.

III. New Business.

- A. General Discussion. No general discussion.
- B. <u>Budget Review and Bank Update</u>. The current bank balance is approximately \$24, 2000. All banking issues have been sorted out with account signatories. John has been able to invoice via Quickbook and sent invitations to members to pay. Most were received, but some went to spam folders. QB will send general reminders when it has not been paid and Amy and John will also be able to send via Square. The chapter can also accept payments via Zelle using the gmail address.
- C. <u>2021 Tax Return</u>. John and Krishna will get together to handle the taxes for 2021 and review with Quinn. Sarah said all they need is the YTD bank statement for 2021 and provide that to Quinn. Sarah will handle tax prep and copy John. Sarah will provide information to save in the drive.
- D. <u>Member Renewal and Sign-up.</u> Kristen has been updating facebook with paid members. This year we have over 50 paid members and we are doing really well with membership. This is most likely due to QB.
- E. <u>Vendor (Affiliate) Sign-up Update.</u> Per meeting minutes, this time last year there were 4 Silver and 3 Gold affiliate members paid. We currently have 2 Gold affiliates; 5 Silver affiliates. The spreadsheet is not up to date until it's been cross checked, but should be by the end of the day today.
- F. <u>Schedule</u>, <u>Speakers</u>, <u>Locations</u> We have our entire schedule for 2022. All members should have received an email with a schedule. We pulled list from National and sent email to all Dallas area



National Members. The speakers have all been confirmed and locations have been confirmed. Kristen made sure the document is live and that the links are active; asked other board members to check links for accuracy; sending to all national dallas members in order to increase membership. All speakers and locations are confirmed. Amy – how many people are signed up? There are 17 signed up for now. Mary Fran will lead meeting on the 17th and arrive early. We only need one screen and a computer for the speaker;

- G. <u>Calendar</u>. Mary Fran and Kristen to add all events through google calendar; Eventbrite is done; facebook is done; today Kristen and Mary Fran will tie it all together; No concerns about the calendar.
- H. <u>Class, Social, Meeting</u>. Classes need a minimum of five signed up within 30 days to hold the class through National. Invitations sent to all current D/FW members for upcoming finance class. We get reimbursed if we have 10 or more signed up. Classes sign up through National. Important to get sign ups and there are requirements for profit sharing on the classes; sent out invitation for the next class to both Dallas and Ft. Worth. Robin from Ft. Worth signed up through Fort Worth specific email;
- I. <u>Flyers for Upcoming Events</u>. Amy suggested an email blast to all realtors in the area and try to drive membership that way; Kristen had spoken to Chato about fliers; get class flier completed and get it sent in a blast; Chato will do this next week; need five to sign up to hold the class; Amy said national creates a flier for each educational class; MF to look for flier for the classes; Amy also said that if we do an email they will let you select where you want the responses. Share as much as possible! We can put tags in our events and that will make it viewable to others seeking out the same type of professional events;
- J. <u>Overview of duties not listed on leadership structure.</u> Website updates for vendors and events. Compliance is due in March. Membership list from National, anyone who wants to join the local chapter must be a member of National first. Call people who paid locally who are not on the



National list. We need to pull the ones assigned to Texas and capture those in our area for potential membership. Kristen is going to work on updates on vendors. All Board members should know how to log into WordPress and create pages. Compliance is due in March and it's just a collection of data. Sarah is responsible for compliance for 2021. Kristen will follow up with Sarah on compliance. We received money from people locally who are not national members; you must be a national member before you can be a local member. Krishna received a phone call from cwsparks who had a charge of \$100 from Krishna's business; John said there was an issue with the contact information and he changed it.

K. <u>Google DriveU</u>. Is everyone on it now? It's organized a way you can reference things you need? No one has issues.

L. <u>Emails and Dist List</u>. Directions on how to pull a distribution list for National are in the drive. Any trouble? John and MF to talk about turning budget into google sheet; should be able to find all the instructions for log ins, etc.

M. <u>Social Media and Web</u> A lot is done, but more needs to be done. Need more. Kristen still can't web from home. Someone please website for us! MF and Kristen to meet to work through this.

- N. <u>NARPM National and State news, conventions, updates, calendars</u> Many dates or signups or reg still not posted. Designation classes through MetroTex ARE! State still not on the web.
- O. <u>Boards like MetroTex</u>, <u>CCAR</u>, <u>Arlington news and calendars or co-op opps</u> We need to continue to monitor and update calendars from other organizations. There is a website for the national convention but registration button is still not live; Texas is still not available; but what are the current dates for Texas Style September 20-22, 2022; look at the google drive and see if that is accurate on the google drive schedule; move September meeting; MF and Kristen to pull dates of other organizations; leasing and property management; Amy will email list of dates;



- P. <u>Succession Planning</u> The only person volunteering is Bill Sabino and we can try to recruit; he is serving as a greeter and to assist with sign in. Jay Hartley's wife, Katie, might be a good candidate for Dallas board; Kristen to follow up with Katie.
- Q. Who is willing to serve on committees 2022 or serve in 2023? Keep ears open for people who are willing to serve on committees. Should be continuing to cultivate growth within the chapter. FYI Bill is being a big help right now and seems to want to be involved.
- R. <u>Texas Conference for Realtors for September 16-18</u> in Ft Worth and in the past we have had a booth just to get some realtors who may be doing property management and providing awareness of our organization. There are grants from National for that. Look into it. How to find grant money and to sign up as a vendor at that conference.
- **IV.** Open Discussion. Amy said normally make a calendar and get volunteers from both Ft. Worth and Dallas and get materials from national; discussion on Fort Worth chapter struggling.
- V. Adjournment. The meeting was adjourned at 9:42 a.m.

NARPM Board Meeting Minutes Wednesday 3/9/2022 9am Google Meet

<u>Attending:</u> Attending the meeting were President Kristen Correa; President-Elect Mary Fran Mulcahy; Secretary Chato Castillo, John Texiera, Treasurer. Meeting was called to order 9:04am

<u>New Business</u> - John & Sarah need to sign up again for access to the bank account. They have 30 days to do this at any Chase Bank.

Budget - Available balance today is \$25,947.53. Looks good, on target for budget.

<u>Tax Prep</u> - Sarah & Quinn completed this. Franchise Tax has been taken care of.

Member Renewal and Sign-up - Over 60 paid pro members! QB auto-emails remaining...

<u>Vendor Sign-up Update</u> - All 2021 have renewed for 2022 & paid. Sheet in drive is updated.

<u>Schedule</u>, <u>Speakers</u>, <u>Locations</u> - Schedule is up to date with links to sign-up.

Calendar - Add Texas Realtor Conference & share NARPM booth with Ft. Worth.

<u>Class, Social, Meeting</u> - Class 9 signed up to date. Need 10+ to profit share.

<u>Flyers for Upcoming Events</u> - No flyers needed now; put Events on FB & Eventbrite FREE. <u>Overview of duties not listed on leadership structure</u> - NTR

Google Drive - Everyone is online on drive and good with this.

Emails and Dist List - Continue to use an updated fresh pulled National list (vs using our paid members list; not all paid members sent in a membership form with their \$100 QB payment)

Social Media and Web - Great on FB; need help with web.

NARPM National and State news, conventions, updates, calendars - NTR

MetroTex, CCAR, Arlington News & Calendars or Co-Pp Opps - MetroTex joint 11/1

Succession Planning - NTR

Who is willing to serve on committees 2022 or serve in 2023 - NTR

Who can we talk to about speaking next year? NTR

Open Discussion NTR

Meeting Adjourned - 9:23am



MEETING MINUTES OF June 8, 2022 BOARD MEETING (via ZOOM)

- **I.** Call to Order President. Meeting called to order at 9:02 a.m.
- II. <u>Attendance via Zoom</u>. Attending the meeting were President Kristen Correa; President-Elect Mary Fran Mulcahy; Regional Amy Karns Hanson; and Treasurer John Teixeira. Secretary Chato Castillo and Past President Sarah Bordelon were not present.

III. New Business.

- A. General Discussion. No general discussion this morning.
- B. MF to email unpaid members to get business. Check up on Blue Diamond. Kristen and MF to see about getting together and coordinating an effort to give a 50% offer to the unpaids.
- C. <u>September meeting</u>. Until Texas releases an agenda, we can't finalize our September meeting.
- D. <u>April membership meeting</u>. Last meeting. Poor turnout and feedback was that most people had started summer plans and were not available. Also, the topic of burnout was not well received by the membership.
- E. MetroTex/Dallas NARPM Joint Meeting. Some are pushing for a panel. Amy Karns asking for feedback on the panel idea; Kristen said not getting any participation on panels is limiting the panel idea. Upcoming meeting we should have ideas for speakers. Amy recalled a class Brian Birdy gave and Mary Fran said he was a very engaged speaker and elicited feedback; Joint event is November 2, 10-2.
- F. <u>Update from Treasurer</u>. Diamond Blue Air, affiliate, email went to wrong email address, John to resend invoice. Kristen and Mary Fran will provide a new list of members to send to. John says there may be 132 and Kristen said



to delete the current unpaid members in QB. We need to check email addresses.

- G. We have the same agenda each month, and we can go through the usual, or we can just wrap this up.
- H. <u>Board Plans for 2023</u>. Amy suggested making plans for the Board next year and start planning.
- I. <u>Budget Review and Bank Update</u>. Has not changed significantly.
- J. <u>Upcoming Social</u>. Dueling Pete's Piano Bar on June 24.. Mary Fran to start email campaign for attendance today or tomorrow.
- K. Adjournment. Meeting was adjourned at 9:27 a.m.

NARPM Board Meeting Agenda Wednesday 5/11/2022 9am Google Meet

Attending Kristen; Sarah; and MF called at 9:00

New Business:

<u>Treasurer Report:</u> John joined at 9:08 a.m.; received some checks from NARPM, possibly grant money, but no notation

Budget Available balance is \$19257.70.

Member Renewal and Sign-up We have 66 paid pro members! QB auto-emails remaining Let's pull fresh unpaid list and send invoice for \$50 for last ½ of the year... see if that doesn't get a few more. Mf to follow up with unpaid members for ½ off through gmail and alert them to possible spam

<u>Vendor Sign-up Update</u> 7 GOLD & 6 SILVER - up one from last meeting! John, did the AC vendor signup? Jerry Hicks Diamond Blue Air - did he sign up? He had a referral from Mike at MRR;



<u>Schedule, Speakers, Locations</u> Schedule is up to date with links to sign-up. Mary Fran running May meeting; get with Kristento get materials

<u>Calendar</u> Up to date; call out to organizers of TX Realtors conference about a booth; waiting to correct september because Texas Style keeps changing dates;

<u>Class, Social, Meeting</u> Class good turnout; Meeting and social coming up good turnout should get profit share; panel did a good job at the meeting; social coming up in June at Pete

<u>Flyers for Upcoming Events</u> No flyers needed now; put Events on FB & Eventbrite FREE. But we will better check next time, we had party crashers at bowling who ate our food lol

Overview of duties not listed on leadership structure

Google Drive Everyone is online on drive and good with this. Please add minutes from last board

Emails and Dist List Continue to use an updated fresh pulled National list vs using our paid members list; not all paid members sent in a membership form with their \$100 QB payment; Let's change the remaining QB to \$50 for the last ½ of the year- maybe some will join at ½ off; asked john to provide list of people who have not paid

<u>Social Media and Web</u> Hired co NARPM Gayle recommended, she's handling FB, Eventbrite, web and all. She is going to help us out for the time being; she has done some great posts for FACEBOOK;

<u>NARPM National and State news, conventions, updates, calendars</u> State you can reg. Dates still confusing though.

MetroTex, CCAR, Arlington News & Calendars or Co-Pp Opps MetroTex joint 11/1

Succession Planning

Who is willing to serve on committees 2022 or serve in 2023 -

Who can we talk to about speaking next year?



Open Discussion Adjourn



MEETING MINUTES OF July 20, 2022 BOARD MEETING (via ZOOM)

- I. <u>Call to Order President</u>. Meeting called to order at 9:00 a.m.
- II. <u>Attendance via Zoom</u>. Attending the meeting were President Kristen Correa; President-Elect Mary Fran Mulcahy; Past President Sarah Bordelon; Treasurer John Teixeira; and Krishna Upadhyaya.

III. New Business.

- A. General Discussion. No general discussion this morning.
- B. <u>September meeting</u>. Too busy for a meeting in September due to so many other meetings. No objections to canceling the September meeting. Minimum of 4 per year
- C. <u>MetroTex/Dallas NARPM Joint Meeting</u>. No update yet. Should be having another strategic planning meeting with MetroTex. Joint event is November 2, 10 a.m. to 2 p.m. Brian Birdy may be the invited speaker.
- D. <u>Update from Treasurer</u>. Bank balance is \$27,403.50 in QB; needs to be reconciled with the bank account. All transactions sit until accepted and the balance is actually \$16,280.84; this includes all expenses for the year.
- E. <u>Board Plans for 2023</u>. Normally we will send out a Survey Monkey for volunteers. Sarah has volunteered to send out Survey Monkey or MailChimp.
- F. <u>Budget Review and Bank Update</u>. Has not changed significantly.
- G. <u>Upcoming Social</u>. Union Bear Brewing on August 18th from 4:00 to 6:00 p.m. New inquiries at NARPM and we are inviting new members and those who have expressed interest. Mary Fran to send out email with social information and removing September meeting due to crowded calendar.
- H. NARPM Booth. Kristen would like to have Ft. Worth/Dallas chapters to have a NARPM booth at Texas Realtors Conference with a sign up sheet to represent NARPM to conference attendees. Krishna can possibly help with this. John indicates Martha Dent may be able to assist.



- I. Upcoming conferences National conference in Las Vegas October 17-20; Texas Style is in San Antonio September 20-22.
- J. Adjournment. Meeting was adjourned at 9:19 a.m.



MINUTES OF Sept. 14, 2022 BOARD MEETING (via ZOOM)

- **I.** Call to Order President Meeting was called to order at 9:40 a.m.
- II. <u>Attendance via Zoom</u> I. Attending the meeting were President Kristen Correa; President-Elect Mary Fran Mulcahy; Past President Sarah Bordelon; Treasurer John Teixeira; and Secretary Chato Castillo.

III.

IV. New Business

- A. <u>General Discussion</u> We had a meeting with the new VA this morning. She is committed to 12 hours per month to our chapter. Discussed upcoming events and how she can assist.
- B. <u>September meeting</u> September meeting was canceled due to conflict with Texas Style conference.
- C. <u>MetroTex/Dallas NARPM Joint Meeting</u> This has been postponed until 2023 because the new MetroTex building will not be completed by that time.
- D. <u>Update from Treasurer</u> Bank balance is \$17,437.00. We have applied for Grants from national.
- E. <u>Board Plans for 2023</u> Current Secretary, Chato Castillo, will move to President-Elect and John Teixeira will remain as Treasurer. Sarah and Mary Fran (or Milly, the VA) will send out a Survey Monkey asking for volunteers to fill the Secretary position. Russ Blackwell has said he would serve in the past. russ@reedycreekms.com
- F. <u>Budget Review and Bank Update</u> We're on track with the budget we set. And the bank account is at \$17k or so.
- G. <u>Upcoming Events & Socials</u> State Conference in San Antonio and National Conference in October. October 26 is next meeting at Clubs of Prestonwood with Cary Donham as the speaker. November 17 Social at Top Golf in The Colony. Last event for the year is the holiday dinner and officer installation on December 8 at Table 13 in Addison.



- H. NARPM Booth Manning Texas Realtors Conference booth with Fort Worth NARPM chapter and have scheduled representatives for Saturday, September 17. Kristen will bring balloon decorations and candy. Fort Worth is splitting the expense with our chapter.
- Upcoming conferences National conference in Las Vegas October 17-20; Texas Style is in San Antonio September 20-22.
- J. Adjournment. Meeting adjourned at 10:25 a.m.



MEETING MINUTES

OCTOBER 12, 2022 BOARD MEETING (via ZOOM)

- I. <u>Call to Order President</u>. The meeting was called to order at approximately 9:10 a.m. after some technical difficulties.
- II. <u>Attendance via Zoom.</u> In attendance were President-Elect, Mary Fran Mulcahy and Secretary,Chato Castillo. Treasurer, John Teixeira joined at about 9:25 a.m.

III. New Business:

- A. <u>General Discussion</u>. This was a short meeting mainly discussing the upcoming NARPM Conference in Las Vegas the following week.
- B. <u>MetroTex/Dallas NARPM Joint Meeting</u>. This event is being rescheduled due to the new MetroTex facility possibly not meeting their CO before the meeting.
- C. <u>Update from Treasurer</u>. None.
- D. Adjournment. Meeting was adjourned at 9:30 a.m.



MEETING MINUTES

November 09, 2022 BOARD MEETING (via ZOOM)

- I. Call to Order President. The meeting was called to order at approximately 9:10 am.
- II. <u>Attendance via Zoom.</u> In attendance were Kristen Correa President, Mary Fran Mulcahy President-Elect, Chato Castillo Secretary, John Teixeira Treasurer, Sarah Bordelon joined at about 9:00 a.m.

III. New Business:

- A. General Discussion. This was a short meeting mainly discussing the upcoming year objectives.
- B. <u>MetroTex/Dallas NARPM Joint Meeting</u>. This event is being rescheduled due to the new MetroTex facility possibly not meeting their CO before the meeting.
- C. Board Plans for 2023 Strategic planning meeting planned for Nov 29th. Location TBD
- D. <u>Update from Treasurer</u>. None.
- E. Upcoming Events & Socials. Only two left. Nov 17th Top Golf, Dec 8th Winter Dinner
- F. Adjournment. Meeting was adjourned at 9:30 a.m.



MINUTES FOR DECEMBER 7, 2022 BOARD MEETING (via GoogleMeet)

- I. <u>Call to Order</u>: The meeting was called to order at approximately 9:00 am
- II. <u>Attendance via Zoom.</u> In attendance were Kristen Correa President, Mary Fran Mulcahy President-Elect, Chato Castillo Secretary, John Teixeira Treasurer

III. New Business:

- A. General Discussion Reimbursement process see google drive for form
- B. Board Election Vote Motion to approve 2023 board election. Board unanimously approved.

President - Mary Fran Mulchany

President Elect - Chato Castillo

Treasurer - John Teixeria

Secretary - Russ Blackwell

Past President - Kristen Correa

- C. <u>Update from Treasurer</u>. Billing for Holiday Party complete. \$10,656 current balance.
- D. <u>Holiday Party</u> Podium notes will be provided
- E. <u>Membership Invitations & Billing</u> Asking VA to create membership forms today. Board will work toward invitations & QB billing Monday/Tuesday after party.
- F. <u>Update from Fort Worth</u> Planning events together. Goals for the year: Quality content, well marketed, promoted via flyer blast to all in MLS.
- G. <u>Update from all other NARPM, PM orgs L&PM etc</u> MetroTex open house is Monday. Discuss sponsor opps with them onsite. Texas Style likely Sept. Grapevine.
- H. Adjournment 9:25



NARPM BOARD OF DIRECTORS 2023

Past President

Kristen Correa

President

Mary Frances Mulcahy

President Elect

Chato Castillo

Treasurer

John Teixeira

Secretary

Russ Blackwell

New Member Mentor

Bill Sabino

#8

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Monday, September 26, 2022 8:22:05 AM Last Modified: Monday, September 26, 2022 8:23:31 AM

Time Spent: 00:01:25 **IP Address:** 172.58.178.65

Page 1: Positions with a * are REQUIRED

Q1

Chapter Name

Dallas

Q2

Chapter President*

Mary Fran Mulcahy

Q3

President Elect*

Chato Castillo

Q4

Past President*

Kristen Correa

Vice President (if applicable)

Respondent skipped this question

Q6

Q5

Treasurer*

John Teixeira

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Secretary*

Russ Blackwell

Q8

New Member Mentor* In June 2020, NARPM National adopted the motion that all chapters are required to identify a New Member Mentor for their chapter each year. It is not an elected position, but is a duty that a volunteer member or board member should be completing. The program is in the Chapter Success Guide, starting on page 148.

Bill Sabino

Q9

Education Chair

Kristen Correa

Q10

Membership Chair

Bill Sabino

Q11

Legislative Chair

Russ Blackwell

Q12

Respondent skipped this question

Other position(s) not listed

#32

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Friday, September 30, 2022 9:43:28 AM
Last Modified: Friday, September 30, 2022 12:26:39 PM

Time Spent: 02:43:10 **IP Address:** 189.181.180.207

Page 1: Positions with a * are REQUIRED

Q1

Chapter Name

Greater Dallas

Q2

Chapter President*

Mary Frances Mulcahy

Q3

President Elect*

Chato Castillo

Q4

Past President*

Kristen Correa

Vice President (if applicable)

Respondent skipped this question

Q6

Q5

Treasurer*

John Teixeira

Q7

Secretary*

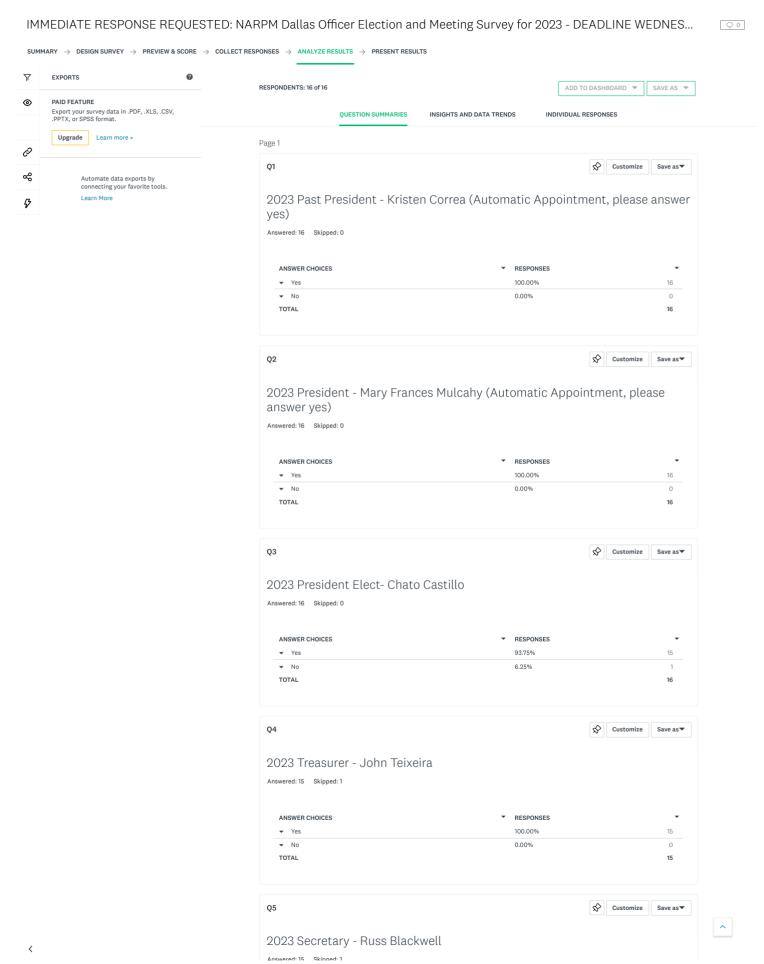
Russ Blackwell

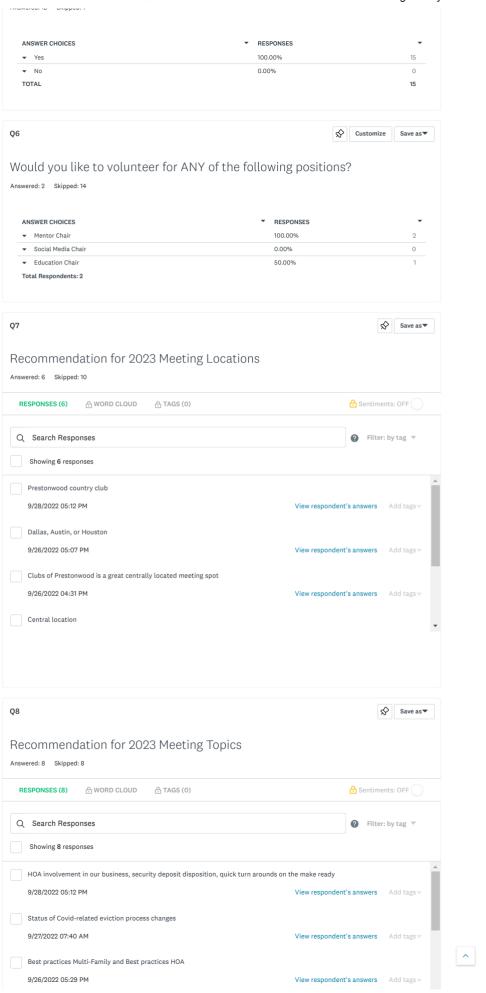
Q8

New Member Mentor* In June 2020, NARPM National adopted the motion that all chapters are required to identify a New Member Mentor for their chapter each year. It is not an elected position, but is a duty that a volunteer member or board member should be completing. The program is in the Chapter Success Guide, starting on page 148.

Bill Sabino

Q9 Education Chair	Respondent skipped this question
Q10 Membership Chair	Respondent skipped this question
Q11 Legislative Chair	Respondent skipped this question
Q12 Other position(s) not listed	Respondent skipped this question





IMMEDIATE RESPONSE REQUESTED: NARPM Dallas Officer Election and Meeting Survey for 2023 - DEADLINE WEDNESDAY, SEPTEMBER 28!





NARPM Dallas <narpmdallas@gmail.com>

Mon, Sep 26, 2022, 3:42 PM



to NARPM, bcc: Ro, bcc: Suzanne, bcc: quinten315, bcc: labillingsley, bcc: stevieb6929, bcc: Russ, bcc: Sarah, bcc: bbroyles ▼

Greetings to our Dallas Membership! It's time to elect your Board of Directors for 2023. We must turn this information into National this week. Please take just <u>TWO MINUTES</u> to complete the attached survey. Any recommendations and/or suggestions for meeting places and meeting topics are GREATLY appreciated! Looking forward to a fantastic year!

https://www.surveymonkey.com/r/T87DSMZ

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Thanks for contacting the Greater Dallas Chapter of the National Association of Residential Property Managers



National Association of Residential Property Managers
GREATER DALLAS CHAPTER