

2019 Exempt Org. Return
prepared for:

**Long Beach Orange County Chapter of
National Assoc of Res Prop Mgr**
3662 Katella Avenue Suite #211
Los Alamitos, CA 90720

DO NOT MAIL

Susan Chubbuck, CPA
24302 Avenida De Las Flores
Laguna Niguel, CA 92677

FORM 990-EZ REVENUE

Contributions, gifts, and grants.....	15,494
Total revenue.....	15,494

EXPENSES

Professional fees/pymt to contractors.....	280
Other expenses.....	15,232
Total expenses.....	15,512

NET ASSETS OR FUND BALANCES

Excess or (deficit) for the year.....	-18
Net assets/fund bal. at beg. of year.....	6,483
Net assets/fund bal. at end of year.....	6,465

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2019

California 199 Tax Summary
Long Beach Orange County Chapter of
National Assoc of Res Prop Mgr

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81-3972912

REVENUE

Gross contributions, gifts, & grants..... 15,494

Total income..... 15,494

EXPENSES AND DISBURSEMENTS

Other deductions..... 15,512

Total deductions..... 15,512

Excess of receipts over disbursements..... -18

FILING FEE

Filing fee..... 0

Balance due..... 0

DO NOT MAIL

2019

General Information
Long Beach Orange County Chapter of
National Assoc of Res Prop Mgr

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Forms needed for this return

Federal: 990-EZ, Sch A, Sch O, 8868
California: 199, 8453-E0, e-file Instructions

Carryovers to 2020

None

DO NOT MAIL

The organization's Federal tax return is NOT FINISHED until you complete the following instructions.

Prior to transmission of the return

Form 990-EZ

The organization should review their Federal Return along with any accompanying schedules and statements.

Paperless e-file

The organization should read, sign and date the Form 8879-EO, IRS e-file Signature Authorization.

Even Return

No payment is required.

After transmission of the return

Receive acknowledgement of your e-file transmission status.

Within several hours, connect with Lacerte and get your first acknowledgement (ACK) that Lacerte has received your transmission file.

Connect with Lacerte again after 24 and then 48 hours to receive your Federal ACKs.

Keep a signed copy of Form 8879-EO, IRS e-file Signature Authorization in your files for 3 years.

Do not mail:

Form 8879-EO IRS e-file Signature Authorization

The organization's Federal tax return is NOT FINISHED until you complete the following instructions.

Prior to transmission of the return

Form 8868

No signature is required with Form 8868.

Even Return

No payment is required.

After transmission of the return

Receive acknowledgement of your e-file transmission status.

Within several hours, connect with Lacerte and get your first acknowledgement (ACK) that Lacerte has received your transmission file.

Connect with Lacerte again after 24 and then 48 hours to receive your Federal ACKs.

DO NOT MAIL

The entity's 2019 California tax return is **NOT FINISHED** until you complete the following instructions.

Prior to transmission of the return

Form 199

The entity should review their 2019 California Exempt Income Tax Return along with any accompanying schedules and statements.

Form 8453-EO

The entity should review, sign and date Form 8453-EO prior to e-filing the return.

Even Return

No payment is required.

After transmission of the return

Receive acknowledgement of your e-file transmission status.

Within several hours, connect with Lacerte and get your first acknowledgement (ACK) that Lacerte has received your transmission file.

Connect with Lacerte again after 24 and then 48 hours to receive your California acknowledgements.

Keep a signed copy of Form 8453-EO in your files for 4 years.

Do Not Mail:

Form 8453-EO

Franchise Tax Board, PO Box 942857, Sacramento CA 94257-0531

Form **8879-EO****IRS e-file Signature Authorization
for an Exempt Organization**

OMB No. 1545-1878

For calendar year 2019, or fiscal year beginning _____, 2019, and ending _____, 20____

▶ **Do not send to the IRS. Keep for your records.**▶ **Go to www.irs.gov/Form8879EO for the latest information.****2019**Department of the Treasury
Internal Revenue Service

Name of exempt organization

Long Beach Orange County Chapter of
National Assoc of Res Prop Mgr

Employer identification number

81-3972912

Name and title of officer

Adam Roberts

Treasurer

Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line **1a**, **2a**, **3a**, **4a**, or **5a**, below, and the amount on that line for the return being filed with this form was blank, then leave line **1b**, **2b**, **3b**, **4b**, or **5b**, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than one line in Part I.

1 a Form 990 check here ▶ ☐	b Total revenue , if any (Form 990, Part VIII, column (A), line 12)	1 b _____
2 a Form 990-EZ check here ▶ ☒	b Total revenue , if any (Form 990-EZ, line 9)	2 b <u>15,494.</u>
3 a Form 1120-POL check here ▶ ☐	b Total tax (Form 1120-POL, line 22)	3 b _____
4 a Form 990-PF check here ▶ ☐	b Tax based on investment income (Form 990-PF, Part VI, line 5)	4 b _____
5 a Form 8868 check here ▶ ☐	b Balance Due (Form 8868, line 3c)	5 b _____

Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2019 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

☒ I authorize Susan Chubbuck, CPA to enter my PIN 20700 as my signature
ERO firm name Enter five numbers, but do not enter all zeros

on the organization's tax year 2019 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☐ As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2019 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ _____

Date ▶ _____

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN

33176841195Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2019 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶

Susan ChubbuckDate ▶ 06/01/2020

**ERO Must Retain This Form – See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So**

BAA For Paperwork Reduction Act Notice, see instructions.

Form **8879-EO** (2019)

**Application for Automatic Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-0047

► **File a separate application for each return.**
 ► **Go to www.irs.gov/Form8868 for the latest information.**

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.		Taxpayer identification number (TIN)
	Long Beach Orange County Chapter of National Assoc of Res Prop Mgr		81-3972912
	Number, street, and room or suite number. If a P.O. box, see instructions.		
	3662 Katella Avenue #211		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	Los Alamitos, CA 90720		

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► Adam Roberts

Telephone No. ► 562-903-1139

Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ► ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ► ☐. If it is for part of the group, check this box ... ► ☐ and attach a list with the names and TINs of all members the extension is for.

- 1 I request an automatic 6-month extension of time until 11/15, 2020, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

► ☒ calendar year 20 19 or

► ☐ tax year beginning _____, 20____, and ending _____, 20____.

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	0.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2020)

Form **990-EZ**Department of the Treasury
Internal Revenue Service**Short Form**
Return of Organization Exempt From Income TaxUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except private foundations)

▶ Do not enter social security numbers on this form, as it may be made public.

▶ Go to www.irs.gov/Form990EZ for instructions and the latest information.

OMB No. 1545-0047

2019**Open to Public
Inspection****A** For the 2019 calendar year, or tax year beginning , 2019, and ending ,

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending	C Long Beach Orange County Chapter of National Assoc of Res Prop Mgr 3662 Katella Avenue #211 Los Alamitos, CA 90720	D Employer identification number 81-3972912
G Accounting Method: ☒ Cash ☐ Accrual Other (specify) ▶		E Telephone number 562-903-1139
I Website: ▶ N/A		F Group Exemption Number ▶
J Tax-exempt status (check only one) — ☒ 501(c)(3) ☐ 501(c) () ◀(insert no.) ☐ 4947(a)(1) or ☐ 527		H Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).
K Form of organization: ☐ Corporation ☐ Trust ☐ Association ☐ Other		
L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B)) are \$500,000 or more, file Form 990 instead of Form 990-EZ. ▶ \$ 15,494.		

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)Check if the organization used Schedule O to respond to any question in this Part I. ☒

Revenue	1 Contributions, gifts, grants, and similar amounts received	1	15,494.
	2 Program service revenue including government fees and contracts	2	
	3 Membership dues and assessments	3	
	4 Investment income	4	
	5a Gross amount from sale of assets other than inventory	a	
	b Less: cost or other basis and sales expenses	5b	
	c Gain or (loss) from sale of assets other than inventory (subtract line 5b from line 5a)	5c	
	6 Gaming and fundraising events:		
	a Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	
c Less: direct expenses from gaming and fundraising events	6c		
d Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d		
7a Gross sales of inventory, less returns and allowances	7a		
b Less: cost of goods sold	7b		
c Gross profit or (loss) from sales of inventory (subtract line 7b from line 7a)	7c		
8 Other revenue (describe in Schedule O)	8		
9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	15,494.	
Expenses	10 Grants and similar amounts paid (list in Schedule O)	10	
	11 Benefits paid to or for members	11	
	12 Salaries, other compensation, and employee benefits	12	
	13 Professional fees and other payments to independent contractors	13	280.
	14 Occupancy, rent, utilities, and maintenance	14	
	15 Printing, publications, postage, and shipping	15	
	16 Other expenses (describe in Schedule O) See Schedule O	16	15,232.
	17 Total expenses. Add lines 10 through 16	17	15,512.
18 Excess or (deficit) for the year (subtract line 17 from line 9)	18	-18.	
Net Assets	19 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	6,483.
	20 Other changes in net assets or fund balances (explain in Schedule O)	20	
	21 Net assets or fund balances at end of year. Combine lines 18 through 20	21	6,465.

BAA For Paperwork Reduction Act Notice, see the separate instructions.

Form 990-EZ (2019)

Check if the organization used Schedule O to respond to any question in this Part II. ☐

Check if the organization used Schedule O to respond to any question in this Part II

Part III	Statement of Program Service Accomplishments (see the instructions for Part III)	Expenses
	Check if the organization used Schedule O to respond to any question in this Part III. ☒	(Required for section 501

What is the organization's primary exempt purpose? See Schedule O

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

(Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)

Part IV **List of Officers, Directors, Trustees, and Key Employees** (list each one even if not compensated — see the instructions for Part IV)
Check if the organization used Schedule O to respond to any question in this Part IV ☐

Check if the organization used Schedule O to respond to any question in this Part IV.....

BAA TEEA0812L 08/23/19 Form 990-EZ (2019)

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V. ☐ See Sch O

	Yes	No
33 Did the organization engage in any significant activity not previously reported to the IRS? If 'Yes,' provide a detailed description of each activity in Schedule O.	33	X
34 Were any significant changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O. See instructions.	34	X
35a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a	X
b If 'Yes' to line 35a, has the organization filed a Form 990-T for the year? If 'No,' provide an explanation in Schedule O.	35b	
c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If 'Yes,' complete Schedule C, Part III.	35c	X
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N.	36	X
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a 0.		
b Did the organization file Form 1120-POL for this year?	37b	X
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee; or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a	X
b If 'Yes,' complete Schedule L, Part II, and enter the total amount involved.	38b 0.	
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9.	39a 0.	
b Gross receipts, included on line 9, for public use of club facilities.	39b 0.	
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ 0.; section 4912 ▶ 0.; section 4955 ▶ 0.		
b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I.	40b	X
c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958.		
d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization.		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T.	40e	X
41 List the states with which a copy of this return is filed ▶ None		

42a The organization's books are in care of ▶ Adam Roberts Telephone no. ▶ 562-903-1139
 Located at ▶ 11325 La Mirada Blvd Whittier CA ZIP + 4 ▶ 90604

	Yes	No
b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	X
If 'Yes,' enter the name of the foreign country ▶ _____		
See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
c At any time during the calendar year, did the organization maintain an office outside the United States?	42c	X
If 'Yes,' enter the name of the foreign country ▶ _____		

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** — Check here ☐ N/A
 and enter the amount of tax-exempt interest received or accrued during the tax year. ▶ **43** N/A

	Yes	No
44a Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ.	44a	X
b Did the organization operate one or more hospital facilities during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ.	44b	X
c Did the organization receive any payments for indoor tanning services during the year?	44c	X
d If 'Yes' to line 44c, has the organization filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O.	44d	
45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a	X
b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R may need to be completed instead of Form 990-EZ. See instructions.	45b	X

46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I.

	Yes	No
46		X

Part VI Section 501(c)(3) Organizations Only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI.

47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II.

	Yes	No
47		X

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E.

48		X
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49 a Did the organization make any transfers to an exempt non-charitable related organization?

49 a		X
------	--	---

b If 'Yes,' was the related organization a section 527 organization?

49 b		
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50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
None				

f Total number of other employees paid over \$100,000

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation
None		

d Total number of other independent contractors each receiving over \$100,000

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations must attach a completed Schedule A.

☒ Yes ☐ No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer	Date			
	Adam Roberts Type or print name and title	Treasurer			
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
	Susan Chubbuck	Susan Chubbuck	06/01/2020		P00289238
	Firm's name	Firm's EIN			
	Firm's address	Phone no.			
	Laguna Niguel, CA 92677			949-510-1058	

May the IRS discuss this return with the preparer shown above? See instructions.

☒ Yes ☐ No

BAA

Form 990-EZ (2019)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2019

**Open to Public
Inspection**

Name of the organization

Long Beach Orange County Chapter of
National Assoc of Res Prop Mgr

Employer identification number

81-3972912

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 ☒ An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations: _____
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants'.)						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2019 (line 6, column (f) divided by line 11, column (f)).	14	%
15 Public support percentage from 2018 Schedule A, Part II, line 14	15	%
16a 33-1/3% support test—2019. If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization. ▶ ☐		
b 33-1/3% support test—2018. If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization ▶ ☐		
17a 10%-facts-and-circumstances test—2019. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here . Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ ☐		
b 10%-facts-and-circumstances test—2018. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here . Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ ☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ ☐		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants'.)			10,613.	27,669.	15,494.	53,776.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.						0.
3 Gross receipts from activities that are not an unrelated trade or business under section 513.						0.
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						0.
5 The value of services or facilities furnished by a governmental unit to the organization without charge						0.
6 Total. Add lines 1 through 5.	0.	0.	10,613.	27,669.	15,494.	53,776.
7a Amounts included on lines 1, 2, and 3 received from disqualified persons.	0.	0.	0.	0.	0.	0.
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.	0.	0.	0.	0.	0.	0.
c Add lines 7a and 7b.	0.	0.	0.	0.	0.	0.
8 Public support. (Subtract line 7c from line 6.)						53,776.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
9 Amounts from line 6.	0.	0.	10,613.	27,669.	15,494.	53,776.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.						0.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						0.
c Add lines 10a and 10b.	0.	0.	0.	0.	0.	0.
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.						0.
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						0.
13 Total support. (Add lines 9, 10c, 11, and 12.)	0.	0.	10,613.	27,669.	15,494.	53,776.

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**. ☒

Section C. Computation of Public Support Percentage

15 Public support percentage for 2019 (line 8, column (f), divided by line 13, column (f)).	15	%
16 Public support percentage from 2018 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2019 (line 10c, column (f), divided by line 13, column (f)).	17	%
18 Investment income percentage from 2018 Schedule A, Part III, line 17.	18	%

19a 33-1/3% support tests—2019. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

b 33-1/3% support tests—2018. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If 'No,' describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If 'Yes,' explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If 'Yes,' answer (b) and (c) below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If 'Yes,' describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If 'Yes,' explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ('foreign supported organization')? If 'Yes' and if you checked 12a or 12b in Part I, answer (b) and (c) below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If 'Yes,' describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If 'Yes,' explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If 'Yes,' answer (b) and (c) below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If 'Yes,' provide detail in Part VI .		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If 'Yes,' complete Part I of Schedule L (Form 990 or 990-EZ).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If 'Yes,' complete Part I of Schedule L (Form 990 or 990-EZ).		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If 'Yes,' provide detail in Part VI .		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If 'Yes,' provide detail in Part VI .		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If 'Yes,' provide detail in Part VI .		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If 'Yes,' answer 10b below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
b A family member of a person described in (a) above?		
c A 35% controlled entity of a person described in (a) or (b) above? If 'Yes' to a, b, or c, provide detail in Part VI .		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If 'No,' describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If 'Yes,' explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If 'No,' describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If 'No,' explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If 'Yes,' describe in Part VI the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a ☐ The organization satisfied the Activities Test. Complete line 2 below.			
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.			
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).			
2 Activities Test. Answer (a) and (b) below.			
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If 'Yes,' then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.			
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If 'Yes,' explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.			
3 Parent of Supported Organizations. Answer (a) and (b) below.			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI .			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If 'Yes,' describe in Part VI the role played by the organization in this regard.			

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B – Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C – Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

BAA

Schedule A (Form 990 or 990-EZ) 2019

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D – Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 Total annual distributions. Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2019 from Section C, line 6	
10 Line 8 amount divided by line 9 amount	

Section E – Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2019	(iii) Distributable Amount for 2019
1 Distributable amount for 2019 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2019 (reasonable cause required – explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2019			
a From 2014			
b From 2015			
c From 2016			
d From 2017			
e From 2018			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2019 distributable amount			
i Carryover from 2014 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2019 from Section D, line 7:			
a Applied to underdistributions of prior years			
b Applied to 2019 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2019, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2019. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2020. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2015			
b Excess from 2016			
c Excess from 2017			
d Excess from 2018			
e Excess from 2019			

BAA

Schedule A (Form 990 or 990-EZ) 2019

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)

DO NOT MAIL

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2019

**Open to Public
Inspection**

Name of the organization **Long Beach Orange County Chapter of
National Assoc of Res Prop Mgr**

Employer identification number
81-3972912

Form 990-EZ, Part I, Line 16
Other Expenses

Advertising and Promotion.....	\$	400.
Bank Charges.....		118.
Conferences, Conventions, and Meetings.....		11,725.
Contributions.....		150.
Dues & Subscriptions.....		550.
Insurance.....		889.
Office Equipment.....		588.
Office Expenses.....		321.
Taxes & Licenses.....		101.
Travel.....		390.
Total	\$	<u>15,232.</u>

Form 990-EZ, Part III - Organization's Primary Exempt Purpose

Establish and promote education to its members.

Form 990-EZ, Part V - Regarding Transfers Associated with Personal Benefit Contracts

(a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?..... No

(b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?..... No

2019

California Exempt Organization
Annual Information Return

199

Calendar Year 2019 or fiscal year beginning (mm/dd/yyyy), and ending (mm/dd/yyyy)

Corporation/Organization name LONG BEACH ORANGE COUNTY CHAPTER OF NATIONAL ASSOC OF RES PROP MGR		California corporation number 3902124
Additional information. See instructions.		FEIN 81-3972912
Street address (suite or room) 3662 KATELLA AVENUE ##211		PMB no.
City LOS ALAMITOS	State CA	Zip code 90720
Foreign country name	Foreign province/state/county	Foreign postal code

A First Return ☐ Yes ☒ No B Amended Return ☐ Yes ☒ No C IRC Section 4947(a)(1) trust ☐ Yes ☒ No D Final Information Return? ☐ Dissolved ☐ Surrendered (Withdrawn) ☐ Merged/Reorganized Enter date: (mm/dd/yyyy) E Check accounting method: 1 ☒ Cash 2 ☐ Accrual 3 ☐ Other F Federal return filed? 1 ☐ 990T 2 ☐ 990-PF 3 ☐ Sch H (990) 4 ☒ Other 990 series G Is this a group filing? See instructions ☐ Yes ☒ No H Is this organization in a group exemption ☐ Yes ☒ No If "Yes," what is the parent's name? I Did the organization have any changes to its guidelines not reported to the FTB? See instructions ☐ Yes ☒ No	J If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions ☐ Yes ☒ No K Is the organization exempt under R&TC Section 23701g? ... ☐ Yes ☒ No If "Yes," enter the gross receipts from nonmember sources \$ L If organization is a public charity exempt under R&TC Section 23701d and meets the filing fee exception, check box. No filing fee is required ☒ M Is the organization a Limited Liability Company? ☐ Yes ☒ No N Did the organization file Form 100 or Form 109 to report taxable income? ☐ Yes ☒ No O Is the organization under audit by the IRS or has the IRS audited in a prior year? ☐ Yes ☒ No P Is federal Form 1023/1024 pending? ☐ Yes ☐ No Date filed with IRS
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Part I Complete Part I unless not required to file this form. See General Information B and C.

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8.	1	
	2	Gross dues and assessments from members and affiliates.	2	
	3	Gross contributions, gifts, grants, and similar amounts received.	3	15,494.
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than \$50,000, see General Information B.	4	15,494.
	5	Cost of goods sold.	5	
	6	Cost or other basis, and sales expenses of assets sold.	6	
	7	Total costs. Add line 5 and line 6.	7	
	8	Total gross income. Subtract line 7 from line 4.	8	15,494.
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18.	9	15,512.
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8.	10	-18.
Filing Fee	11	Total payments.	11	
	12	Use tax. See General Information K.	12	
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11.	13	
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12.	14	
	15	Filing fee \$10 or \$25. See General Information F.	15	
	16	Penalties and Interest. See General Information J.	16	
	17	Balance due. Add line 12, line 15, and line 16. Then subtract line 11 from the result.	17	0.
Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
Paid Preparer's Use Only	Signature of officer	Title TREASURER	Date	Telephone 562-903-1139
	Preparer's signature 	Date 06/01/2020	Check if self-employed ☒	PTIN P00289238
	Firm's name (or yours, if self-employed) and address SUSAN CHUBBUCK, CPA 24302 AVENIDA DE LAS FLORES LAGUNA NIGUEL, CA 92677			Firm's FEIN
				Telephone 949-510-1058
May the FTB discuss this return with the preparer shown above? See instructions. ☒ Yes ☐ No				

Part II Organizations with gross receipts of more than \$50,000 and private foundations regardless of amount of gross receipts – complete Part II or furnish substitute information.

Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions.	•	1	
	2	Interest	•	2	
	3	Dividends	•	3	
	4	Gross rents	•	4	
	5	Gross royalties	•	5	
	6	Gross amount received from sale of assets (See Instructions)	•	6	
	7	Other income. Attach schedule.	•	7	
	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Page 1, Part I, line 1.	•	8	
Expenses and Disbursements	9	Contributions, gifts, grants, and similar amounts paid. Attach schedule.	•	9	
	10	Disbursements to or for members.	•	10	
	11	Compensation of officers, directors, and trustees. Attach schedule. SEE STMT 1	•	11	0.
	12	Other salaries and wages.	•	12	
	13	Interest	•	13	
	14	Taxes	•	14	
	15	Rents	•	15	
	16	Depreciation and depletion (See instructions)	•	16	
	17	Other Expenses and Disbursements. Attach schedule. SEE STATEMENT 2	•	17	15,512.
	18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Page 1, Part I, line 9.	•	18	15,512.

Schedule L Balance Sheet		Beginning of taxable year		End of taxable year	
		(a)	(b)	(c)	(d)
Assets					
1	Cash		6,483.		6,465.
2	Net accounts receivable				
3	Net notes receivable				
4	Inventories				
5	Federal and state government obligations				
6	Investments in other bonds				
7	Investments in stock				
8	Mortgage loans				
9	Other investments. Attach schedule.				
10 a	Depreciable assets.				
b	Less accumulated depreciation.				
11	Land				
12	Other assets. Attach schedule.				
13	Total assets		6,483.		6,465.
Liabilities and net worth					
14	Accounts payable				
15	Contributions, gifts, or grants payable				
16	Bonds and notes payable				
17	Mortgages payable				
18	Other liabilities. Attach schedule.				
19	Capital stock or principal fund		6,483.		6,465.
20	Paid-in or capital surplus. Attach reconciliation.				
21	Retained earnings or income fund.				
22	Total liabilities and net worth		6,483.		6,465.

Schedule M-1 Reconciliation of income per books with income per return

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000

1	Net income per books	•	7	Income recorded on books this year not included in this return. Attach schedule	•
2	Federal income tax	•	8	Deductions in this return not charged against book income this year. Attach schedule.	•
3	Excess of capital losses over capital gains	•	9	Total. Add line 7 and line 8	
4	Income not recorded on books this year. Attach schedule.	•	10	Net income per return. Subtract line 9 from line 6.	
5	Expenses recorded on books this year not deducted in this return. Attach schedule	•			
6	Total. Add line 1 through line 5.				

Statement 1
Form 199, Part II, Line 11
Compensation of Officers, Directors, Trustees and Key Employees

Current Officers:

Name and Address	Title and Average Hours Per Week Devoted	Total Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
Matt Tandy 3662 Katella Ave #211 Los Alamitos, CA 90720	President 0	\$ 0.	\$ 0.	\$ 0.
Scott Brady 3662 Katella Ave. #211 Los Alamitos, CA 90720	President Elect 0	0.	0.	0.
Sue Roberts 3662 Katella Ave. #211 Los Alamitos, CA 90720	Secretary 0	0.	0.	0.
Adam Roberts 3662 Katella Ave. #211 Los Alamitos, CA 90720	Treasurer 0	0.	0.	0.
Marco Montes 3662 Katella Ave #211 Los Alamitos, CA 90720	Member at Large 0	0.	0.	0.
Total		\$ 0.	\$ 0.	\$ 0.

Statement 2
Form 199, Part II, Line 17
Other Expenses

Accounting Fees.....	\$ 210.
Advertising and Promotion.....	400.
Bank Charges.....	118.
Conferences, Conventions, and Meetings.....	11,725.
Contributions.....	150.
Dues & Subscriptions.....	550.
Insurance.....	889.
Legal Fees.....	70.
Office Equipment.....	588.
Office Expenses.....	321.
Taxes & Licenses.....	101.
Travel.....	390.
Total	\$ 15,512.

Date Accepted _____

DO NOT MAIL THIS FORM TO THE FTB

TAXABLE YEAR

2019**California e-file Return Authorization for
Exempt Organizations**

FORM

8453-EO

Exempt Organization name

LONG BEACH ORANGE COUNTY CHAPTER OF

Identifying number

81-3972912

Part I Electronic Return Information (whole dollars only)

1	Total gross receipts (Form 199, line 4)	1	15,494.
2	Total gross income (Form 199, line 8)	2	15,494.
3	Total expenses and disbursements (Form 199, Line 9)	3	15,512.

Part II Settle Your Account Electronically for Taxable Year 2019

4 ☐ Electronic funds withdrawal 4a Amount _____ 4b Withdrawal date (mm/dd/yyyy) _____

Part III Banking Information (Have you verified the exempt organization's banking information?)

5 Routing number _____
 6 Account number _____ 7 Type of account: ☐ Checking ☐ Savings

Part IV Declaration of Officer

I authorize the exempt organization's account to be settled as designated in Part II. If I check Part II, Box 4, I authorize an electronic funds withdrawal for the amount listed on line 4a.

Under penalties of perjury, I declare that I am an officer of the above exempt organization and that the information I provided to my electronic return originator (ERO), transmitter, or intermediate service provider and the amounts in Part I above agree with the amounts on the corresponding lines of the exempt organization's 2019 California electronic return. To the best of my knowledge and belief, the exempt organization's return is true, correct, and complete. If the exempt organization is filing a balance due return, I understand that if the Franchise Tax Board (FTB) does not receive full and timely payment of the exempt organization's fee liability, the exempt organization will remain liable for the fee liability and all applicable interest and penalties. I authorize the exempt organization return and accompanying schedules and statements be transmitted to the FTB by the ERO, transmitter, or intermediate service provider. **If the processing of the exempt organization's return or refund is delayed, I authorize the FTB to disclose to the ERO or intermediate service provider the reason(s) for the delay.**

**Sign
Here**

Signature of officer

Date

TREASURER
Title**Part V Declaration of Electronic Return Originator (ERO) and Paid Preparer.** See instructions.

I declare that I have reviewed the above exempt organization's return and that the entries on form FTB 8453-EO are complete and correct to the best of my knowledge. (If I am only an intermediate service provider, I understand that I am not responsible for reviewing the exempt organization's return. I declare, however, that form FTB 8453-EO accurately reflects the data on the return.) I have obtained the organization officer's signature on form FTB 8453-EO before transmitting this return to the FTB; I have provided the organization officer with a copy of all forms and information that I will file with the FTB, and I have followed all other requirements described in FTB Pub. 1345, 2019 Handbook for Authorized e-file Providers. I will keep form FTB 8453-EO on file for **four** years from the due date of the return or **four** years from the date the exempt organization return is filed, whichever is later, and I will make a copy available to the FTB upon request. If I am also the paid preparer, under penalties of perjury, I declare that I have examined the above exempt organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

**ERO
Must
Sign**ERO's
signatureFirm's name (or yours
if self-employed)
and address

SUSAN CHUBBUCK

SUSAN CHUBBUCK, CPA

24302 AVENIDA DE LAS FLORES
LAGUNA NIGUEL CA

Date

06/01/2020

Check if
also paid
preparer ☒Check if
self-
employed ☒

ERO's PTIN

P00289238

Firm's FEIN

ZIP code 92677

Under penalties of perjury, I declare that I have examined the above organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

**Paid
Preparer
Must
Sign**Paid
preparer's
signatureFirm's name
(or yours if self-
employed) and
address

Date

Check if
self-employed ☐

Paid preparer's PTIN

Firm's FEIN

ZIP code

For Privacy Notice, get FTB 1131 ENG/SP.

FTB 8453-EO 2019

NARPM LONG BEACH/ORANGE COUNTY 2021 BUDGET

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Income													
Affiliate Dues	\$280	\$500	\$1,000	\$500	\$400	\$0	\$140	\$0	\$140	\$0	\$140	\$0	\$3,100
Grants from National												\$500	\$500
Holiday party tickets													\$0
Holiday party sponsorship													\$0
Meal income									\$1,100	\$1,100	\$1,100		\$3,300
Monthly sponsorship	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$250	\$250	\$250		\$1,750
Shared income from class 50/50	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Budgeted Income	\$405	\$625	\$1,125	\$625	\$525	\$125	\$265	\$125	\$1,490	\$1,350	\$1,490	\$500	\$8,650
Expense													
Accounting/Tax prep	\$40	\$40	\$40	\$40	\$40	\$40	\$40	\$40	\$40	\$40	\$40	\$40	\$40
Bank charges	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$180
BOD meetings	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Charitable Contributions													
Holiday party													\$0
Miscellaneous	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$180
Monthly meal charge									\$1,060	\$1,060	\$1,060		\$3,180
Taxes/Licenses					\$400								\$400
Website	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$2,400
Travel													\$0
Total	\$270	\$270	\$270	\$270	\$670	\$270	\$270	\$270	\$1,330	\$1,330	\$1,330	\$270	\$6,820
Total Budgeted Expense	\$270	\$270	\$270	\$270	\$670	\$270	\$270	\$270	\$1,330	\$1,330	\$1,330	\$270	\$6,820
Total Budgeted Income	\$405	\$625	\$1,125	\$625	\$525	\$125	\$265	\$125	\$1,490	\$1,350	\$1,490	\$500	\$8,650
Total Budgeted Expense	\$270	\$270	\$270	\$270	\$670	\$270	\$270	\$270	\$1,330	\$1,330	\$1,330	\$270	\$6,820
Net Operating Income	\$135	\$355	\$855	\$355	-\$145	-\$145	-\$5	-\$145	\$160	\$20	\$160	\$230	\$1,830

Narpm-Long Beach-Orange County Chapter

Profit and Loss
January - December 2020

	JAN 2020	FEB 2020	MAR 2020	APR 2020	MAY 2020	JUN 2020	JUL 2020
Revenue							
Affiliate Member	530.00	513.73	140.00		242.45		
Cover Charge Cash	170.00		195.00				
Cover Charge Income - via checks	230.00		155.00				
Cover Charge Income - via credit card	1,661.92	886.65		54.29			
NARPM Awards Income							
Sponsorship Income	95.00	242.45			96.80		193.60
Total Revenue	\$2,686.92	\$1,642.83	\$490.00	\$54.29	\$339.25	\$0.00	\$193.60
GROSS PROFIT	\$2,686.92	\$1,642.83	\$490.00	\$54.29	\$339.25	\$0.00	\$193.60
Expenditures							
Charitable Contributions							
Dues & Subscriptions							
Equipment			37.31				
General Meetings							
General Meetings - Meals					559.19		
General Meetings - Venue		1,500.00	600.00				
Total General Meetings		1,500.00	600.00		559.19		
Insurance		615.80					
Internet & Website Service		200.00	200.00	200.00	200.00	200.00	200.00
Meals and Entertainment	1,657.07	77.52					
Subscription Services							
QuickBooks Online							40.00
Total Subscription Services							40.00
Taxes & Licenses						420.00	
Travel							
Total Expenditures	\$1,657.07	\$2,393.32	\$837.31	\$200.00	\$759.19	\$620.00	\$240.00
NET OPERATING REVENUE	\$1,029.85	\$ -750.49	\$ -347.31	\$ -145.71	\$ -419.94	\$ -620.00	\$ -46.40
NET REVENUE	\$1,029.85	\$ -750.49	\$ -347.31	\$ -145.71	\$ -419.94	\$ -620.00	\$ -46.40

Narpm-Long Beach-Orange County Chapter

Profit and Loss
January - December 2020

	AUG 2020	SEP 2020	OCT 2020	NOV 2020	DEC 2020	TOTAL
Revenue						
Affiliate Member	180.06				250.00	\$1,856.24
Cover Charge Cash						\$365.00
Cover Charge Income - via checks						\$385.00
Cover Charge Income - via credit card						\$2,602.86
NARPM Awards Income				789.00		\$789.00
Sponsorship Income	100.00	100.00	96.80	100.00		\$1,024.65
Total Revenue	\$280.06	\$100.00	\$96.80	\$889.00	\$250.00	\$7,022.75
GROSS PROFIT	\$280.06	\$100.00	\$96.80	\$889.00	\$250.00	\$7,022.75
Expenditures						
Charitable Contributions	250.00					\$250.00
Dues & Subscriptions				714.00		\$714.00
Equipment						\$37.31
General Meetings						\$0.00
General Meetings - Meals						\$559.19
General Meetings - Venue						\$2,100.00
Total General Meetings						\$2,659.19
Insurance	615.80		659.80			\$1,891.40
Internet & Website Service	200.00	200.00	200.00	200.00	200.00	\$2,200.00
Meals and Entertainment						\$1,734.59
Subscription Services						\$0.00
QuickBooks Online	685.00	40.00	40.00	40.00	40.00	\$885.00
Total Subscription Services	685.00	40.00	40.00	40.00	40.00	\$885.00
Taxes & Licenses						\$420.00
Travel					249.00	\$249.00
Total Expenditures	\$1,750.80	\$240.00	\$899.80	\$954.00	\$489.00	\$11,040.49
NET OPERATING REVENUE	\$ -1,470.74	\$ -140.00	\$ -803.00	\$ -65.00	\$ -239.00	\$ -4,017.74
NET REVENUE	\$ -1,470.74	\$ -140.00	\$ -803.00	\$ -65.00	\$ -239.00	\$ -4,017.74

Narpm-Long Beach-Orange County Chapter

Balance Sheet
As of December 31, 2020

	JAN 2020	FEB 2020	MAR 2020	APR 2020	MAY 2020	JUN 2020
ASSETS						
Current Assets						
Bank Accounts						
Chase Checking	7,494.65	6,744.16	6,396.85	6,251.14	5,831.20	5,211.20
Total Bank Accounts	\$7,494.65	\$6,744.16	\$6,396.85	\$6,251.14	\$5,831.20	\$5,211.20
Total Current Assets	\$7,494.65	\$6,744.16	\$6,396.85	\$6,251.14	\$5,831.20	\$5,211.20
TOTAL ASSETS	\$7,494.65	\$6,744.16	\$6,396.85	\$6,251.14	\$5,831.20	\$5,211.20
LIABILITIES AND EQUITY						
Liabilities						
Current Liabilities						
Credit Cards						
FM Credit Card	0.00	0.00	0.00	0.00	0.00	0.00
Total Credit Cards	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Current Liabilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Liabilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Equity						
Members' Equity	6,879.69	6,879.69	6,879.69	6,879.69	6,879.69	6,879.69
Opening Balance Equity	-414.89	-414.89	-414.89	-414.89	-414.89	-414.89
Net Revenue	1,029.85	279.36	-67.95	-213.66	-633.60	-1,253.60
Total Equity	\$7,494.65	\$6,744.16	\$6,396.85	\$6,251.14	\$5,831.20	\$5,211.20
TOTAL LIABILITIES AND EQUITY	\$7,494.65	\$6,744.16	\$6,396.85	\$6,251.14	\$5,831.20	\$5,211.20

Narpm-Long Beach-Orange County Chapter

Balance Sheet
As of December 31, 2020

	JUL 2020	AUG 2020	SEP 2020	OCT 2020	NOV 2020	DEC 2020
ASSETS						
Current Assets						
Bank Accounts						
Chase Checking	5,164.80	3,694.06	3,554.06	2,751.06	2,686.06	2,447.06
Total Bank Accounts	\$5,164.80	\$3,694.06	\$3,554.06	\$2,751.06	\$2,686.06	\$2,447.06
Total Current Assets	\$5,164.80	\$3,694.06	\$3,554.06	\$2,751.06	\$2,686.06	\$2,447.06
TOTAL ASSETS	\$5,164.80	\$3,694.06	\$3,554.06	\$2,751.06	\$2,686.06	\$2,447.06
LIABILITIES AND EQUITY						
Liabilities						
Current Liabilities						
Credit Cards						
FM Credit Card	0.00	0.00	0.00	0.00	0.00	0.00
Total Credit Cards	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Current Liabilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Liabilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Equity						
Members' Equity	6,879.69	6,879.69	6,879.69	6,879.69	6,879.69	6,879.69
Opening Balance Equity	-414.89	-414.89	-414.89	-414.89	-414.89	-414.89
Net Revenue	-1,300.00	-2,770.74	-2,910.74	-3,713.74	-3,778.74	-4,017.74
Total Equity	\$5,164.80	\$3,694.06	\$3,554.06	\$2,751.06	\$2,686.06	\$2,447.06
TOTAL LIABILITIES AND EQUITY	\$5,164.80	\$3,694.06	\$3,554.06	\$2,751.06	\$2,686.06	\$2,447.06

NARPM Meeting				
Dates 2020	Speakers	Subject	Sponsor	Sponsor Paid?
January 16th	KTS	Update on 2020 Laws	Second Nature	
February 27th	Panel/ members who went	Cal Narpn breakdown	MC Landscaping	
March 19th	Canceled due to COVID 19	NARPM Accounting System (NAS)	n/a	
April 16th	KTS/SeaCoast	Best Practices No.1 /COVID 19	n/a	
May 21st	Panel	Best Practices No 2./COVID 19	epipe	
June 18th	Nicole Swain 1st Choice Bnk	PPP and Beyond - loan forgiveness etc	Jim's Flooring	
July 16th	Tony Cline	36 Months to Extinction or Evolution	Doug Akins Puro Clean	
August 20th	Todd Ortscheid	Maximizing Your Company's Revenue/Door	Coastline Environ/A1Plumbing	
Sept. 17th	PWR G.A.D.; KTS	New Legislation - Recent COVID Changes	Water Heaters Only	
October 15th	FTB & CPA	FTB best practices/ Foreign Investors	First Choice Bank	
Nov. 19th	Panel - 2 of each	Go Big or Stay Small = company size	Water Heaters Only	
December	Holiday Party - N/A COVID	N/A	N/A	

**NARPM Long Beach/Orange County Chapter
Board Meeting held January 8th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Sue Roberts, Secretary
Adam Roberts, Treasurer
Marco Montes, Member at Large

Stan Dreckman, Vendor Liaison

Absent: n/a

Meeting Called to Order at 11:00 AM

Items of business:

1. Approved December board meeting minutes.
2. December financial reports (P&L and Balance Sheet) were presented. Scott moved/ Marco seconded and they were approved.
3. We discussed doing our monthly board meetings on line. We may do quarterly ones in person, if we want to. Matt moved/Sue seconded that we do them online for now (unanimous). They will be held on the last Wednesday of the month ie 1/29, 2/26 etc. from 11 to 12 p.m. This will be better than doing them rent week like last year. Matt will be responsible for sending the Zoom invitations out. Mat moved/ Scott seconded. Unanimous.
4. We need to get a copy of the agenda from Laurel who did them last year. Sue will prepare them and send out 48 hours before for review.
5. Matt asked each person to do a short self-introduction.
6. We discussed the view of the chapter for 2020.
7. Matt led the discussion about moving the monthly chapter meetings to a new location again. Possibilities are the Anaheim PWR meeting room or the Expo Center. PWR capacity is 50 or so which won't give us room to grow. We pay an average of \$925 month to Claim Jumper. Average attendance is 44 people and meal costs are \$17 each = \$750. We currently charge people \$25 and up for the meals. Scott thinks the Expo bid is \$1,000 but he'll double check. We could increase the cost of the meals by \$4 per person. Catering (ie. Corner Bakery, Panera) would run \$10 - \$12 per person. If we do buffet style it might run \$250 to \$350. The idea is to pay \$400 for the space and \$500 for the food. One of them charges \$200/hour for four hours or \$600.
8. Matt moved/Scott seconded that we do the February meeting at PWR. (approved). Matt asked Sue send email to members that the Jan. 16th meeting will be at Claim Jumpers, since we announced at the Nov. meeting that we were moving locations in 2020.

9. Matt mentioned that he got emails from Charles and Sandra about moving the location. They expressed concerns about moving out of Long Beach and attendance. Matt responded to both of them. IN the interest of transparency, ilt was agreed that Scott Brady would bring up the need to move locations at the January meeting ("want to grow membership to include more Orange County people and we've outgrown the space at Claim Jumper etc.") Matt moved/Marco seconded. Approved.

Adjourned @ 12:02 p.m.

Next board meeting: **To be determined**

Time: **To be determined**

Venue: **To be determined**



Sue Roberts
Secretary

01/28/2020
Date

Proposed speakers for upcoming meetings:

NARPM Meeting Dates 2020 Speakers		Subject	Sponsor	Sponsor Paid?
January 16th	KTS	Update on 2020 Laws	Second Nature	
February 27th	Panel: CalNARPM			
March				
April				
May				
June				
July				
August				
September				
October				
November				
December	Holiday Party			

**NARPM Long Beach/Orange County Chapter
Board Meeting held January 29th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Sue Roberts, Secretary
Adam Roberts, Treasurer

Stan Dreckman, Vendor Liaison

Absent:

Marco Montes, Member at Large

Meeting Called to Order at 11:11 AM

Items of business:

1. Approved January 8th board meeting minutes. Matt moved/Adam second. Approved.
2. January financial reports (P&L and Balance Sheet) are not available yet as January isn't over. Tabled. Per Adam, \$6460.80 in account today.
3. We discussed moving our monthly meetings to the Business Expo Center. Sue read terms of contract from Business Expo to board. It was decided that Matt as President & Sue as Secretary should sign it. We will contract for Feb. and March meetings @ \$1,500 (600 each plus a \$300 security deposit. Matt moved/Adam seconded. Approved.
4. Someone will need to arrange for the catering. It was suggested that Marco take this on. Matt moved/Adam seconded. Approved. If he can't do it, Matt Tandy will handle it.
5. Adam contacted the tax person Laurel Dial suggested. She is willing to do it for the same price as last year but will need QuickBooks access to the last 2 years of taxes. Adam was given the ok to move forward with this as long as the cost is under \$500. Matt moved/Sue second. Approved.
6. Adam brought up that he never heard back from Cristian to get admin access to the QuickBooks Account. Matt was able to go into the system and add Adam as an admin. He also removed the 2 current admins listed: Cristian and Mr. Davies.
7. We discussed the upcoming calendar for our meetings: February 27th will be a member panel about the CalNARPM meeting the week before; March will be Marco about the NARPM Accounting System (NAS), April could be about utility companies and May could be about HOAs (Scott & Laurel).
8. Adam suggested Matt Tringali as a speaker to cover EOS later in the year. This might require a travel budget. Matt Tandy mentioned that NARPM National has speaker grants available that could help with this. Matt Tandy also mentioned that National has a Speakers' Bureau available. Having some outside speakers may be a breath of fresh air.

9. Another topic that might be of interest is the potential pitfalls of local ordinances. It would be nice to have people speak on things affecting Long Beach, Anaheim & the IE.
10. Stan could reach out to Optimum Seismic to talk about issues that might affect us ie. Deck inspections etc. Stan will reach out to get more information for us about their talk.
11. We discussed the issue we're having with vendors becoming affiliates. Some submit their application without any funds or make their checks payable to the wrong entity. It was decided to work with Elite Venue to allow vendors to complete applications (fillable PDF) online and pay then too via Pay Pal but it will cost us a Pay Pal fee. This way, we can offer them the option of individual or corporate memberships. AR moved. Matt seconded. Approved.
12. Matt requested that Sue prepare a spreadsheet with a list of current vendors so we have an organized structure. Sue doesn't do spreadsheets so Adam has agreed to try and help her.
13. Sue asked how we can assist Stan in distributing the Second Nature flyers that didn't make it to the January meeting. It was agreed that we'll hand it out to those attending the February meeting.

Adjourned @ 12:18 p.m.

Next board meeting: **February 26th, 2020**

Time: **11 am to 12 pm**

Venue: **Web meeting via Zoom**



Sue Roberts
Secretary

02/02/2020
Date

Proposed speakers for upcoming meetings:

NARPM Meeting Dates 2020		Speakers	Subject	Sponsor	Sponsor Paid?
January 16th	KTS		Update on 2020 Laws	Second Nature	
February 27th	Panel: CalNARPM				
March		Marco	NARPM Accounting System (NAS)		
April		Utility Companies			
May		Scott & Laurel	HOAs		
June					
July					
August					
September					
October					
November					
December		Holiday Party			

**NARPM Long Beach/Orange County Chapter
Board Meeting held February 26th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Sue Roberts, Secretary
Adam Roberts, Treasurer
Marco Montes, Member at Large

Absent:

Stan Dreckman, Vendor Liaison

Meeting Called to Order at 11:06 AM

Items of business:

1. Approved January 29th board meeting minutes. Matt motion/Scott second. Approved.
2. Adam presented the January financial reports (P&L and Balance Sheet) that were emailed to board members already. Matt motion/Scott second. Approved. Marco suggested that we set up meals & entertainment into parent & child account: food cost & facility cost. Marco can assist Adam with removing the F&M bank account which was closed a year ago.
3. Adam gave an update on the status of the 2019 taxes. He's reached out to Susan Chubbuck (CPA for Non-profits) a couple of times, after he sent her the 2017 & 2018 taxes. The 2019 taxes aren't due until 5/15/200 but we should have them sooner than that. Adam will follow up.
4. Marco updated us on the catering for the new meeting location. Menu is Garlic Herb Chicken, Stuffed Portabello Mushrooms, salad and Garlic Mashed Potatoes at a cost of \$550. Food will be ready to go at 11:30, buffet style. Marco already paid the bill so we will need to reimburse him. He will also purchase bottled water as the beverage.
5. We discussed doing a survey of the attendees to get feedback on the change of location etc. Scott will prepare a survey with 5 questions including "other topics or suggestions".
6. Feb. CalNARPM panel: Scott, Marco, Adam, Mike Dunfee, John Reney & 2 guys from We Manage attended. Matt will moderate and ask these people to participate on the panel. At the end, he'll open it up for questions. Marco to do a 1 – 2 min. teaser about the March meeting and NAS.
7. Marco Montes will be the March Speaker. Topic: NAS. Stan told Matt no sponsor yet. Marco will need to get Adam his Bio for the Invitation. Marco needs the projector and screen with HTML capability.
8. For the April meeting, we discussed having a speaker talk about utilities services to tenants at a charge.
9. We thought we might have Scott & Laurel cover HOAs in May. Per Scott, there doesn't seem to a lot of PMs interested in the topic = Low attendance at CalNARPM program.

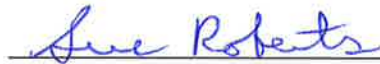
10. Education class: Sue contacted Laurel to follow up. The class we wanted isn't available. Laurel is willing to handle this but she needs us to choose 3 classes we might want and she'll see about availability. Adam spoke with Mellisa Prandi at CalNARPM about teaching a class. She told him she can work with us but we'll need to contact her to follow up.
11. Website update: Adam said that affiliate members can use PayPal once we have a fillable Application available on line which would make things easier. Contact Laurie @ Elite Venu to make this happen.
12. We brainstormed about possible meeting topics: SWOT, insurance, EOS, outsourcing, ancillary businesses ("monetizing your business", FTB education, PM horror stories (in Oct.), Landlord Seminars (Mike Connelly – Matt to reach out), DRE auditor. Section 8 process. Matt asked Sue to do an email thread so everyone can add topic ideas.
13. We need a new microphone (1 is broken). We discussed buying 2 blue tooth/wireless microphones. Scott motion/Matt second. Approved.
14. We need to get Board member name badges for Scott & Marco. The rest of us have them. Sue to reach out to Sandra about ordering them as she did it in the past. Scott motion/Matt second). Approved.

Adjourned @ 12:03 p.m.

Next board meeting: **March 26th, 2020**

Time: **11 am to 12 pm**

Venue: **Web meeting via Zoom**



Sue Roberts
Secretary

03/11/2020

Date

Proposed speakers for upcoming meetings:

NARPM Meeting		Subject		Sponsor	Sponsor Paid?
Dates 2020	Speakers	Update on 2020 Laws		Second Nature	
January 16th	KTS				
February 27th	Panel: CalNARPM				
March	Marco	NARPM Accounting System (NAS)			
April	Utility Companies				
May					
June					
July					
August					
September					
October					
November					
December	Holiday Party				

**NARPM Long Beach/Orange County Chapter
Board Meeting held March 25th, 2020**

Attending:

Scott Brady, President Elect
Adam Roberts, Treasurer
Marco Montes, Member at Large
Stan Dreckman, Vendor Liaison

Absent:

Matt Tandy, President
Sue Roberts, Secretary

Meeting Called to Order at 11:01 AM via Zoom

Items of business:

1. Tabled February 26th board meeting minutes until next meeting.
2. Tabled the February financial reports (P&L and Balance Sheet) until next meeting.
3. We discussed the April & May member meetings in view of the COVID-19 virus.
4. Motion made to cancel the April meeting with the May meeting being tentative but may also be canceled. This will depend on Gov. Newsom reinstating the ability to have large gatherings again. Scott moved/ Marco second.

Adjourned @ 11:26 p.m.

Next board meeting: **April 30th, 2020**

Time: **11 am to 12 pm**

Venue: **Web meeting via Zoom**



Sue Roberts
Secretary

03/25/2020

Date

Proposed speakers for upcoming meetings:

NARPM Meeting		Speakers	Subject	Sponsor	Sponsor Paid?
Dates 2020					
January 16th	KTS		Update on 2020 Laws	Second Nature	
February 27th	Panel: CalNARPM				
March	Marco		NARPM Accounting System (NAS)		
April	Utility Companies				
May					
June					
July					
August					
September					
October					
November					
December	Holiday Party				

**NARPM Long Beach/Orange County Chapter
Board Meeting held April 29th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Adam Roberts, Treasurer
Sue Roberts, Secretary
Marco Montes, Member at Large

Stan Dreckman, Vendor Liaison

Absent: n/a

Meeting Called to Order at 11:10 AM via Zoom

Items of business:

1. February and March minutes were reviewed. Motion Matt/Marco second. Approved .
2. February and March financial reports (P&L and Balance Sheet) were reviewed. Motion Matt/ Scott second. Approved.
3. We discussed the April chapter meeting – our first one online. We had 55 people attend per Adam. Adam also electronically forwarded everyone the KTS handbook that was provided. This was well received. Matt thanked KTS for giving all of us access to this.
4. May meeting was discussed. It will be a Zoom meeting done as a panel on the third Thursday. 11:20 open Zoom, Start at 11:30 and end at 12:30.
 - a. Allow 45 minutes: 4 speakers @ 10 min each (6 or 7 plus time for questions). Possible Theme will be “Good operations in a Pandemic”.
 - b. A list of topics to possibly cover: payment plans, owner authorizations, insurance, collections, tenant laws, inspections, renewals (use latest copy of contract), maintenance, rent increases, leasing strategies.
 - c. We’d also like to have a legal update “ask the attorney”. Maybe Bruce Menke could do this for us. Scott will reach out to Bruce Menke.
 - d. Other idea is to have an economist talk on the financial impact/outlook (Steve Thomas). Scott can reach out. Marco can also reach out to a professor at Cal State Fullerton (Bob). Paul Kankowski could be a panelist. Matt to reach out.
5. Matt said it might be good to have a monthly legal update (5 -10 minute window). Motion Scott/Adam second.
6. June meeting: Scott suggested a maintenance guy as a speaker: Mike Schrafer – property management construction: he’s a great speaker from Duluth.
7. Vendor Spotlight: Fee to be \$100 for Zoom meetings. Give him/her 5 minutes at the end of the meeting.

8. Sue confirmed that Business Expo has given us a \$600 credit for the March meeting and a \$600 credit for the April meeting (BE is also holding \$300 security Deposit).

Adjourned @ 11:58 p.m.

Next board meeting: **MAY 27th, 2020**

Time: **11 am to 12 pm**

Venue: **Web meeting via Zoom**



Sue Roberts
Secretary

05/26/2020
Date

Proposed speakers for upcoming meetings:

NARPM Meeting		Sponsor		Sponsor Paid?	
Dates 2020	Speakers	Subject	Second Nature		
January 16th	KTS	Update on 2020 Laws			
February 27th	Panel/ members who went	Cal NarpM breakdown	MC Landscaping		
March	Canceled due to COVID 19	NARPM Accounting System (NAS)	n/a		
April	KTS/SeaCoast	Best Practices No.1 /COVID 19	n/a		
May	Panel	Best Practices No 2./COVID 19	epipe		
June					
July					
August					
September					
October					
November					
December	Holiday Party				

**NARPM Long Beach/Orange County Chapter
Board Meeting held May 27th, 2020**

Attending:

Matt Tandy, President
Adam Roberts, Treasurer
Sue Roberts, Secretary
Marco Montes, Member at Large

Stan Dreckman, Vendor Liaison

Absent: Scott Brady, President Elect

Meeting Called to Order at 11:04 AM via Zoom

Items of business:

1. Minutes from April board meeting were reviewed. Motion Matt/Adam second. Approved .
2. April financial reports (P&L and Balance Sheet) were reviewed. Motion Matt/ Sue second. Approved.
3. We discussed the May chapter meeting on Zoom. We had approximately 50 people attend per Adam. It was successful online vs. in person. We want to tighten up timing, cut down on the Vendor time (max. 3-5 slides). The one hour meetings aren't long enough to have panels. Had a little issue with the technology so Bruce had to go last and was rushed. We may have him do monthly updates (5 mins) but outside of Zoom. In person = give him 3 minutes plus questions = 5 mins. We also discussed future meetings ie. in person or simulcast with a fee to view for those who can't attend in person. Matt will explore this further.
4. June meeting was discussed. It will be a Zoom meeting and will be about the PPP process going forward (forgiveness). Marco will reach out to Nicole Swain at First Choice Bank as a possible speaker about PPP and Beyond (forgiveness, SBA loans, refis/remodels, conversions).
5. We're also still interested in the maintenance guy (Mike Schafer) from out of state (Deluth). Someone will need to gather more information.
6. We talked about getting vendors to renew memberships online and that they can pay via Paypal.

Adjourned @ 12:00 p.m.

Next board meeting: **WEDNESDAY JUNE 24th, 2020**

Time: **11 am to 12 pm**

Venue: **Web meeting via Zoom**



Sue Roberts, Secretary

06/23/2020

Date

Proposed speakers for upcoming meetings:

NARPM Meeting					Sponsor	Sponsor Paid?
Dates 2020	Speakers	Subject				
January 16th	KTS	Update on 2020 Laws		Second Nature		
February 27th	Panel/ members who went	Cal Narpm breakdown		MC Landscaping		
March	Canceled due to COVID 19	NARPM Accounting System (NAS)		n/a		
April	KTS/SeaCoast	Best Practices No.1 /COVID 19		n/a		
May	Panel	Best Practices No 2./COVID 19		epipe		
June	Nicole Swain 1st Choice Bnk	PPP and Beyond - loan forgiveness etc		Jim's Flooring		
July						
August						
September						
October						
November						
December	Holiday Party					

NARPM Long Beach/Orange County Chapter
Board Meeting held JUNE 24th, 2020

Attending:

Matt Tandy, President
Scott Brady, President Elect
Adam Roberts, Treasurer
Sue Roberts, Secretary
Marco Montes, Member at Large
Stan Dreckman, Vendor Liaison

Meeting Called to Order at 11:04 AM via Zoom

Items of business:

1. Minutes from May board meeting were reviewed. Motion Matt/Marco second. Approved.
2. May financial reports (P&L and Balance Sheet) were table until next month.
3. We discussed the June chapter meeting on Zoom. Nicole reviewed the PPP loans and other SBA products. This topic may have been of interest to office owners more than their employees.
4. The topic of future in person meetings and/or zoom meetings was looked at. Matt asked if Adam could do a poll of the chapter members online. Questions were suggested. Matt Motion/Scott second. Approved. This will be the board's decision but we'll take the temperature of the membership.
5. When in person meetings are allowed we would need to check set up/spacing with the venue. We also need to know the minimum number of people we have to pay for.
6. For Zoom meetings, we need to have topics that have a broad appeal, and do notifications two weeks before the chapter meeting, even if we just put out general info.
7. We are also thinking about simulcasting the in person meetings, when they resume, for those who can't attend due to COVID concerns.
8. July meeting was discussed. It will be a Zoom meeting. Possible speaker could be Tony Cline "Change or Die". Matt will reach out to Tony to see if he is available. Other possible topic could be "Go Big or Stay Small" (pros & cons of business models in our industry).
9. Scott will do a mass mailing inviting 300 outside property managers to the July meeting. Adam will give him the link for the meeting to be included. Adam mentioned that National has grants for marketing available.
10. Brad Larson (TX) is another potential speaker for a future Zoom meeting.
11. We're also still interested in the maintenance guy (Mike Schafer- Deluth) for an in person meeting. Someone will need to gather more information.
12. Per Stan – Homee is supposed to be the vendor for July. He'll reach out to them to confirm. Fee for Zoom meetings is \$100 and can be paid via PayPal. The reduced rate is due to COVID and vendors not being able to meet with property managers to network one on one.

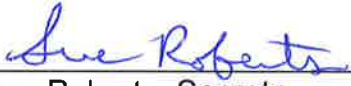
13. Stan asked if we are billing 2019 vendors for renewals. Adam said a handful have been billed. He also sent Diana a PayPal reminder as the June sponsor.
14. It was suggested that Adam check with Lori @ Elite Venue about doing the vendor billing. What is the price? Matt motion/Scott second. Approved. Adam also said he created a PayPal template for billing vendors in Nov for 2021.
15. Stan would like to see us push the corporate membership: a deal at only \$110 more and allows for more people from the companies to attend.
16. Due to COVID, all NARPM classes are now online for free so we won't be doing one this year as a chapter.
17. We tabled the discussion about the domain name: narpmiboc.org. Adam motion. Matt second. Approved
18. Chapter email addresses from last year, to be designated for contacting each board member were also tabled. (Keep them? No cost for yahoo. Move to Gmail? Build online storage
19. Reminder that the Zoom chapter meetings are from 12 to 1 pm.

Adjourned @ 12:00 p.m.

Next board meeting: **WEDNESDAY AUG 26th, 2020**

Time: **11 am to 12 pm**

Venue: **Web meeting via Zoom**



Sue Roberts, Secretary

07/29/2020
Date

Proposed speakers for upcoming meetings:

NARPM Meeting		Speakers		Subject	Sponsor	Sponsor Paid?
Dates 2020						
January 16th	KTS			Update on 2020 Laws	Second Nature	
February 27th	Panel/	members who went		Cal Narpm breakdown	MC Landscaping	
March	Canceled due to COVID 19			NARPM Accounting System (NAS)	n/a	
April	KTS/SeaCoast			Best Practices No.1 /COVID 19	n/a	
May	Panel			Best Practices No 2./COVID 19	epipe	
June	Nicole Swain 1st Choice Bnk			PPP and Beyond - loan forgiveness etc	Jim's Flooring	
July	Tony Cline			36 Months to Extinction or Evolution	Doug Akins Puro Clean	
August						
September						
October						
November						
December	Holiday Party					

**NARPM Long Beach/Orange County Chapter
Board Meeting held JULY 29th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Adam Roberts, Treasurer
Sue Roberts, Secretary
Stan Dreckman, Vendor Liaison

Absent:

Marco Montes, Member at Large

Meeting Called to Order at 11:10 AM via Zoom

Items of business:

1. Minutes from June board meeting were reviewed. Motion Matt/Scott second. Approved.
2. May financial reports (P&L and Balance Sheet) were reviewed. Motion Matt/Sue second. Approved.
3. June financial reports (P&L and Balance Sheet) were reviewed. Motion Matt/Scott second. Approved.
4. Questions were raised about a couple of items on the Balance Sheet: Members Equity, Open Balance Equity. Adam and Marco will look into this.
5. We discussed the July chapter meeting on Zoom. There were 35 attendees (smaller turnout). The topic was excellent – we're keeping the quality up. Zoom fatigue industry wide is a concern. Content saturation on Zoom too. Before we went to conferences or NARPM meetings. Things to help: legal updates, how to make more money do free give aways.
6. The results of the poll showed that people prefer in person meetings but, due to Covid, that's not likely until February 2021.
7. Aug meeting was discussed. We could do a legal and legislative update. Matt motion/Adam second. Approved. Matt will reach out to KTS for legal update and Scott will work on getting a CAR legal affairs person to cover ballot measures (Props. 15, 19 & 21). Sponsor to have 10 minutes, Legal presenter gets 15 minutes plus 5 for questions as does Legislative speaker.
8. Sept meeting was discussed. Todd Orscheid could be a possible speaker: income/profit maximization "squeeze more out of your doors". Matt motion/Adam second. Approved.
9. Scott will do another mass mailing for August and Sept. He will need the registration link from Adam and Lori. Matt will reach out to Todd.
10. We discussed the maintenance topic again. Scott feels this topic appeals to PM companies with 500 plus doors and that many of our pm companies have 50 to 100 doors so this may not be a good draw.

11. Sponsors: Stan is working on the Aug. and Sept. meetings. We haven't received YARDI'S application and dues yet.
12. Adam and Lori/Elite Venue are still working on the vendor billings etc.
13. Elections: We need to get volunteers for the 2021 board. Sue will confirm with Jackie at National when/how the elections need to be done. We'll have Lori do a blast and we'll reach out to contacts. Adam will create a Google form/survey link for interested people. Matt will toss in a chat at the August chapter meeting. Matt motion/Scott second. Approved.
14. Domain name: narpmiboc.org. Rob Sittman set up in 2019 along with individual email addresses for board members. We're not being charged for this. It was to allow us to have centralized storage/drop box.
15. Adam brought up the NARPM National charity for this year: Hamilton Scholars and we decided on a \$250 donation. Matt motion/Adam second. Approved. Adam will make donation for us.

Adjourned @ 11:56 p.m.

Next board meeting: **WEDNESDAY SEPT. 30th, 2020**

Time: **11 am to 12 pm**

Venue: **Web meeting via Zoom**


Sue Roberts, Secretary

08/26/2020
Date

Proposed speakers for upcoming meetings:

NARPM Meeting		Sponsor		Sponsor Paid?
Dates 2020	Speakers	Subject		
January 16th	KTS	Update on 2020 Laws	Second Nature	
February 27th	Panel/ members who went	Cal Narpem breakdown	MC Landscaping	
March	Canceled due to COVID 19	NARPM Accounting System (NAS)	n/a	
April	KTS/SeaCoast	Best Practices No.1 /COVID 19	n/a	
May	Panel	Best Practices No 2./COVID 19	epipe	
June	Nicole Swain 1st Choice Bnk	PPP and Beyond - loan forgiveness etc	Jim's Flooring	
July	Tony Cline	36 Months to Extinction or Evolution	Doug Akins Puro Clean	
August				
September				
October				
November				
December	Holiday Party			

**NARPM Long Beach/Orange County Chapter
Board Meeting held AUGUST 26th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Adam Roberts, Treasurer
Sue Roberts, Secretary
Marco Montes, Member at Large
Stan Dreckman, Vendor Liaison

Absent: n/a

Meeting Called to Order at 11:06 AM via Zoom

Items of business:

1. Minutes from July board meeting were reviewed. Motion Matt/Scott second. Approved.
2. July financial reports (P&L and Balance Sheet) were reviewed. Motion Matt/Sue second. Approved.
3. We discussed the August chapter meeting on Zoom. There were 63 attendees. The topics were excellent: Christine from PWR G.A.D. representative and Susie from KTS. The speakers gave us new info (ever changing) and were quick and concise. KTS went over the 15 Day Notices with us. The vendor did well on his time(Coastline Environ./A-1 Plumbing).
4. Oct. 15th meeting: We want to have a CPA (re foreign owners) and someone from the FTB go over FTB Withholding – best practices. Marco will reach out to an AZ. accountant he knows. Adam will reach out to FTB (spoke at CalNARPM Conference) for speaker. Matt motion/Adam second. Approved.
5. Nov. 19th meeting was discussed: “Go Big or Go Small”. We want to have a panel (2 small companies/Crossland, Keith Becker?) and (2 big companies/Marcel, Scott?) going point counter point. Matt motion/Scott second. Approved.
6. Scott will do another mass mailing for Sept. meeting. He will need the registration link from Adam and Lori.
7. We discussed the Jan. 14th 2021 meeting: It would be good to have KTS do the 2021 Legal Update for us. Scott motion/Sue second. Approved.
8. Sponsors: Stan is working on the Sept. meeting. He’ll reach out to Water Heaters Only.
9. Elections are to be done at the Sept. chapter meeting. Proposed 2021 Board: Scott Brady/Pres., Adam Roberts/ Pres. Elect., Daniel Casada/Secretary, Marco Montes/Treasurer, Mike Dunfee/Member at Large. Matt Motion/Sue second. Approved. Adam will reach out to Daniel and Mike, who volunteered to be on the board.
10. Stan Dreckman is willing to be Vendor Liaison for us again.

11. Matt Tandy was waiting for account information so he could deposit 2 checks: \$540 Chapter Incentive (Chapter Excellence) and \$250 for last Nov. Leadership conference. Adam will get him the account information so Matt can make the deposit at Chase.

Adjourned @ 12:00 p.m.

Next board meeting: **WEDNESDAY OCT. 28TH, 2020**

Time: **10 am to 11 pm**

NOTE NEW TIME!!

Venue: **Web meeting via Zoom**



Sue Roberts, Secretary

09/29/2020
Date

Proposed speakers for upcoming meetings:

NARPM Meeting Dates 2020	Speakers	Subject	Sponsor	Sponsor Paid?
January 16th	KTS	Update on 2020 Laws	Second Nature	
February 27th	Panel/ members who went	Cal Narpm breakdown	MC Landscaping	
March	Canceled due to COVID 19	NARPM Accounting System (NAS)	n/a	
April	KTS/SeaCoast	Best Practices No.1 /COVID 19	n/a	
May	Panel	Best Practices No 2./COVID 19	epipe	
June	Nicole Swain 1st Choice Bnk	PPP and Beyond - loan forgiveness etc	Jim's Flooring	
July	Tony Cline	36 Months to Extinction or Evolution	Doug Akins Puro Clean	
August	Todd Ortscheid	Maximizing Your Company's Revenue/Door	Coastline Environ/A1Plumbing	
September	PWR G.A.D.; KTS	New Legislation - Recent COVID Changes	Water Heaters Only	
October	FTB & CPA	FTB best practices/ Foreign Investors		
November	Panel - 2 of each	Go Big or Stay Small = company size		
December	Holiday Party - N/A COVID	N/A		

**NARPM Long Beach/Orange County Chapter
Board Meeting held SEPTEMBER 30th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Adam Roberts, Treasurer
Sue Roberts, Secretary
Marco Montes, Member at Large
Stan Dreckman, Vendor Liaison

Absent: n/a

Meeting Called to Order at 10:08 AM via Zoom

Items of business:

1. Minutes from August board meeting were reviewed. Motion Matt/Scott second. Approved.
2. August financial reports (P&L and Balance Sheet) were table so we can see a year to date by month breakdown ie. Jan – Aug. . Motion Matt/Sue second. Approved.
3. We discussed the September chapter meeting on Zoom. The attendance was good. Todd Ortscheid did a great job telling us about maximizing revenue per door. The topic seemed to appeal to the attendees.
4. Oct. 15th meeting: Our speakers are confirmed : a CPA (re foreign owners) and someone from the FTB go over FTB Withholding – best practices. Stan is working on getting a sponsor.
5. Nov. 19th meeting was discussed: “Go Big or Stay Small”. We want to have a panel (2 small companies and 2 big companies going point counter point. Suggested speakers for both size of offices were discussed. Adam, Matt & Scott have people to reach out to as possible speakers.
6. We discussed the Jan. 14th 2021 meeting: Stan will reach out to Debora Biggs about doing a legal update for us. He will also work on getting a sponsor.
7. Stan reminded us that National has no insurance coverage. For this past year, we wanted coverage for everything, due to in person meetings. We were required to have certain coverage for Expo Center that we don’t need now/Zoom. We voted to adjust the coverage for \$1500 premium. Scott motion/Adam second. Approved. Stan will send new invoice to Adam.
8. The 2021 board is in place. We want to include the new board members in the November board meeting. Adam will invite them. Stan has agreed to continue as vendor liaison in 2021.

Adjourned @ 10:57 p.m.

Next board meeting: WEDNESDAY NOV. 25TH, 2020

Time: **10 am to 11 pm**

NOTE NEW TIME!!

Venue: **Web meeting via Zoom**



Sue Roberts, Secretary

10/27/2020
Date

**NARPM Long Beach/Orange County Chapter
Board Meeting held OCTOBER 28th, 2020**

Attending:

Matt Tandy, President
Scott Brady, President Elect
Adam Roberts, Treasurer
Sue Roberts, Secretary
Marco Montes, Member at Large
Stan Dreckman, Vendor Liaison

Mike Dunfee – 2021 Secretary
Daniel Casado – 2021 Treasurer

Meeting Called to Order at 12:07 AM via Zoom

Items of business:

1. Corrected minutes from September board meeting were reviewed. Motion Adam/Scott second. Approved.
2. August & September financial reports (P&L and Balance Sheet) were reviewed. Motion Scott/Matt second. Approved.
3. We discussed the October chapter meeting on Zoom. The attendance was very good: 60 – 70 people registered. Speakers successfully covered complex topics: CA FTB Withholding & Withholding for Foreign owners. A lot of questions and answers were handled which was very helpful to our PMs. This was a great value to our members.
4. Jan. 21st, 2021 chapter meeting: Our speaker is confirmed: KTS Legal will do the 2021 Legal Update. Stan is working on getting a sponsor.
5. Nov. 19th meeting was discussed: "Go Big or Stay Small". We want to have a panel overing small, medium and large management companies. Scott has a Power point (30 slides approx.. 15 mins.) that he can do first. We put out suggestions for panelists and came up with a plan. Matt motion/Adam second. Approved .
6. We discussed the Jan. 14th 2021 meeting: Stan will reach out to Debora Biggs about doing a legal update for us. He will also work on getting a sponsor.
7. The 2021 Affiliate membership was discussed: We need to rebuild the group. Adam will work on getting bills out to them in November.
8. Suggested 2021 topics:
 - a. Daniel – economic updates; there's more to keep an eye on now.
 - b. Mike - Multi-generational family businesses – generational transitions.

Adjourned @ 12:57 p.m.

Next board meeting: **JANUARY 28TH, 2021** Tentative, depending on new board

Time: **10 am to 11 pm**

Venue: **Web meeting via Zoom**


Sue Roberts, Secretary

11/24/2020
Date

NARPM Meeting		Subject		Sponsor	Sponsor Paid?
Dates 2020	Speakers				
January 16th	KTS	Update on 2020 Laws	Second Nature		
February 27th	Panel/ members who went	Cal Narpm breakdown	MC Landscaping		
March	Canceled due to COVID 19	NARPM Accounting System (NAS)	n/a		
April	KTS/SeaCoast	Best Practices No.1 /COVID 19	n/a		
May	Panel	Best Practices No 2./COVID 19	epipe		
June	Nicole Swain 1st Choice Bnk	PPP and Beyond - loan forgiveness etc	Jim's Flooring		
July	Tony Cline	36 Months to Extinction or Evolution	Doug Akins Puro Clean		
August	Todd Ortscheid	Maximizing Your Company's Revenue/Door	Coastline Environ/A1Plumbing		
September	PWR G.A.D.; KTS	New Legislation - Recent COVID Changes	Water Heaters Only		
October	FTB & CPA	FTB best practices/ Foreign Investors	First Choice Bank		
November	Panel - 2 of each	Go Big or Stay Small = company size	Water Heaters Only		
December	Holiday Party - N/A COVID	N/A	N/A		

**NARPM Long Beach/Orange County Chapter
Board Meeting held NOVEMBER 25TH, 2020**

Attending:

Matt Tandy, President

Scott Brady, President Elect

Adam Roberts, Treasurer

Sue Roberts, Secretary

Marco Montes, Member at Large

Stan Dreckman, Vendor Liaison

Mike Dunfee – 2021 Secretary

Daniel Casado – 2021 Treasurer

Meeting Called to Order at 10:00 AM via Zoom

Items of business:

1. Minutes from October board meeting were reviewed. Motion Matt/Scott second. Approved.
2. October financial reports (P&L and Balance Sheet) were reviewed. Motion Matt/Scott second. Approved.
3. Adam brought up that our fees for using Constant Contact have gone up for 2021. In 2020 it was \$39/month. 2021 will be \$59/month for up to 500 contacts (the next price level covers 501 – 2000). Marco mentioned that Mailchimp might be less. In the past we used it with Eventbrite (higher than PayPal fees). Laurie at EliteVenue is more experience with Constant Contact. Scott also has a data base of 700 property managers we might also access.
4. We discussed the November chapter meeting: “Go Big or Stay Small” on Zoom. A panel of property managers spoke about their individual companies.
5. We are set for the Jan. 21st, 2021 chapter meeting: Our speaker is confirmed: KTS Legal will do the 2021 Legal Update. Puro Clean will be the sponsor.
6. Scott took us through his ideas for 2021: We will continue with Zoom meetings for the first quarter but may be able to resume in person meetings in May. **Scott suggested that we set up a professional Zoom account for the chapter since we used Matt’s account for 2020.** Scott also suggested doing a Mastermind group about the industry for new members. Stan suggested involving the vendors in this. We discussed letters to be sent to new members (must be approved by the regional AJ). Scott also feels CAR is our biggest resource.
7. The 2021 Affiliate membership was discussed: We need to bill the vendors for 2021 and rebuild the group. Sue asked that we streamline the process for affiliates as it is hard to follow who joins now because some of it is done on line (Pay Pal). **Adam will reach out to Laurie at Elite Venue about setting this all up online. Maybe we can send an invoice with the online application and way to pay.**
8. We brainstormed suggested 2021 topics:
 - a. Use of virtual assistants – panel
 - b. Making money with maintenance

- c. DRE audits
- d. Accounting made fun =NAS
- e. Mental health challenges
- f. Buy/Sell/Hold
- g. Keeping peace in the multi-generational family businesses (i.e. generational transitions).

9. Matt asked that we all take 3-4 days to think about additional topics and forward them on to the other board members.

Adjourned @ 10:57 p.m.

Next board meeting: JANUARY 28TH, 2021 Tentative, depending on new board

Time: **10 am to 11 pm**

Venue: **Web meeting via Zoom**



12/21/2020

Sue Roberts, Secretary

Date

NARPM Meeting		Sponsor			Sponsor Paid?	
Dates 2020	Speakers	Subject	Second Nature	MC Landscaping	n/a	n/a
January 16th	KTS	Update on 2020 Laws				
February 27th	Panel/ members who went	Cal Narpmm breakdown				
March	Canceled due to COVID 19	NARPM Accounting System (NAS)	n/a			
April	KTS/SeaCoast	Best Practices No.1 /COVID 19	n/a			
May	Panel	Best Practices No 2./COVID 19	epipe			
June	Nicole Swain 1st Choice Bnk	PPP and Beyond - loan forgiveness etc	Jim's Flooring			
July	Tony Cline	36 Months to Extinction or Evolution	Doug Akins Puro Clean			
August	Todd Ortscheid	Maximizing Your Company's Revenue/Door	Coastline Environ/A1Plumbing			
September	PWR G.A.D.; KTS	New Legislation - Recent COVID Changes	Water Heaters Only			
October	FTB & CPA	FTB best practices/ Foreign Investors	First Choice Bank			
November	Panel - 2 of each	Go Big or Stay Small = company size	Water Heaters Only			
December	Holiday Party - N/A COVID	N/A	N/A			