

NARPM's Monterey Bay Chapter Presents:



How do we move forward screening tenants under the new laws
for 2020?

Justin Rhinesmith of NTN will share the best practices moving
forward

Don't miss it!

February 20, 2020 11:30 – 1:30

Monterey County Association of REALTORS®

Located at: 201 – A Calle Del Rey Oaks, Del Rey Oaks, CA 93940

Pre -register for \$17.00 for members

\$20.00 for non-members

\$25.00 at the door.

Call William Sterling to register at 831-643-9402



National Association of Residential Property Managers



COVID-19 FEDERAL STIMULUS
webinar with special guest
TODD ORTSCHIED
hosted by TONY CLINE

COVID-19 STIMULUS PACKAGE IMPACT ON LANDLORDS AND PROPERTY MANAGERS

**Apr 1, 2020 10:00 AM Pacific Time
(MAY REQUIRE NARPM NATIONAL MEMBERSHIP)**

Join special guest Todd Ortscheid, Host Tony Cline, and panelists Shawn Johnson, and Matthew Tringali as we discuss how the new Federal stimulus package will impact your landlords and your property management companies.

We will be discussing what's in the law and what's not including information on evictions, notices to vacate, mortgage forbearance, rent collection, rent forgiveness, late fees, holdover tenants, and many other hot topics!

Join us for a presentation AND discussion about how some of the best property managers plan to adapt to the new rules.

Bring your questions, we have planned plenty of time for Q&A



National Association of Residential Property Managers

M O N T E R E Y B A Y C H A P T E R

ONLINE MEETING - MEMBERS ONLY!

CORONAVIRUS AND THE PROPERTY MANAGER

Join the Monterey Bay Chapter of NARPM and our Legislative Chair, Jan Leasure, to discuss managing property in the coronavirus environment.

We will discuss local, state, and federal legislation that impacts how you manage property today.

We will talk about how you are advertising and showing property while complying with the orders that are changing quickly.

Bring your questions!

COST - \$17.00

ONLINE MEETING - MEMBERS ONLY!

CURT BULLOCH INSURANCE

PROPERTY MANAGEMENT PRESENTATION

- A. Why you need to be an Additional Insured and how it relates to your Indemnity Agreement.
- B. How to Get your Tenant's to buy Renter's Insurance
- C. How to Understand your Coverage for Professional Liability
- D. Cyber Liability Insurance, Why you need it.
- E. Employment Practice Liability Coverage, Why it will protect you.
- F. Commercial Auto Coverage, How it protects you and your Employees
- G. Vendor Insurance Coverage Requirements, How it will protect your business
- H. Workers Comp and 1099 Employees or Independent Contractor Traps
- I. Recent Real Life Claims and How They Can Be Avoided

COST - \$17.00

DATE - NOVEMBER 17, 2020

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING - MEMBERS ONLY!

MANAGING FOR FOREIGN INVESTORS

Do you want to learn how to successfully navigate the IRS laws regarding the sale of real estate owned by foreign investors? Do you manage foreign owned rental properties but are not sure if you are following all of the IRS rules correctly? How do you handle foreign owned Limited Liability Companies, Corporations and Partnerships that own U.S. real estate?

Richard Hart, President of Hart & Associates will teach you all that you need to know on how to avoid costly mistakes made by property managers and real estate brokers when dealing with U.S. real estate owned by foreign investors. By the end of the workshop, you will have the knowledge and confidence on how to stay compliant with the IRS and be a star when managing foreign owned real estate.

COST - \$17.00

DATE - DECEMBER 17, 2020

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING - MEMBERS ONLY!

2 IMPORTANT TOPICS

SERVICE AND SUPPORT ANIMALS: WHAT EVERY PROPERTY MANAGER NEEDS TO KNOW

In this session we will look at the analysis of HUD's FHEO-2020-01 Assistance Animal Notice that established a new guideline on January 28, 2020, relating to assistance animals in housing to assist housing providers, animal owners and medical providers relating to requests for accommodation for assistance animals

AND

THE "MUST" HAVES FOR PROPERTY MANAGERS IN 2020

In this class we will discuss some of the top things that Property Managers need to HAVE to ensure they are keeping up with the changing times in the industry, are able to grow, and can be seen as the right choice for both Owners and Tenants.

COST -	\$17.00
DATE -	JULY 16, 2020
TIME -	11:30AM – 01:30PM

ONLINE MEETING - MEMBERS ONLY!

MONTEREY COUNTY HEALTH DEPARTMENT SMOKE-FREE HOUSING PRESENTATION

As Monterey County residents spend more time at home due to COVID-19, some residents of multi-unit housing are experiencing an increase in second hand smoke exposure.

Join Michelle House for an update on smoke-free housing and a discussion of ways to find the balance between equity and public health concerns.

COST -	\$17.00
DATE -	October 15, 2020
TIME -	12:00 PM – 02:00 PM



**THIS YEAR'S THEME FOR NARPM'S
CALIFORNIA CONFERENCE! RAISING THE
BAR IN 2020!**

**IF YOU MISSED IT ...NO WORRIES! YOUR
MONTEREY BAY CHAPTER BOARD
BROUGHT HOME THE BEST OF THE CAL
NARPM CONFERENCE:**

**MARCH 19, 2020 11:30- 1:30
Monterey County Association of REALTORS®
Located at: 201-A Calle del Oaks
Del Rey Oaks, CA 93940**

**Pre-register to reserve your seat. MCAR has a room
capacity of 60 people.**

\$27.00 member price.

\$47.00 non-member price.

Call William Sterling to register at 831-643-9402



**National Association of Residential Property Managers
M O N T E R E Y B A Y C H A P T E R**

Trust Fund
Handling
presented by our
Treasurer:
Fred Nohr

Business Health
Check-Up
Presented by our
Raffle Chair:
Gail Valdez

Kimball Tirey and
St. John's Legal
Update Presented
by our
Membership Chair:
Carrie Appling

Young, "Be the
CEO of Your Own
Life" Presented by
our Chapter
President:
Rhonda Navarro

SPEAKER BIO:

Allison DiSarro is the Senior Vice President of Property Management Banking at Seacoast Commerce Bank.

She is the leading industry specialist who is well known and respected for her vast knowledge of Real Estate trust bank accounts. Allison banks hundreds of management companies and ensures their client trust funds are protected accordingly. She often teaches on this subject and has been a resource for management companies, auditors, consultants and bookkeepers.

Allison has been with Seacoast Commerce Bank for 10 years, banking ONLY Property Management companies and their affiliated companies.

SPEAKER EXPERIENCE:

Allison has been a guest speaker at over a dozen local/regional NARPM chapter meetings, as well as repeat locations. She has also spoken at PM franchise company summits.

Allison has spoken at the CALNARPM 2019 conference in Napa, CA with high post ratings.

Allison has also been the guest of several industry related podcasts as well as a recent blogger, on this very topic, for Buildium Software.

ONLINE MEETING - MEMBERS ONLY!

HOW TO EMBEZZLE FROM A PM

APMHelp.com specializes in cleaning up and keeping property management companies in compliance with their state regulatory requirements. They combine ex-software professionals (AppFolio, Buildium, Propertyware) with accountants and build tech to enable them to be extremely efficient.

Due to the nature of their work, they have consulted more than a handful of clients when embezzlement was suspected or discovered and have provided evidence in legal proceedings to assist in the prosecution of the wrongdoers.

Their mission is to clean up the industry and make it better. One way to do that is by spreading awareness of how easy it is to embezzle from property managers so they can prevent it from happening to them.

COST -	\$17.00
DATE -	AUGUST 20, 2020
TIME -	11:00AM – 01:30PM

ONLINE MEETING - MEMBERS ONLY!

CALIFORNIA FRANCHISE TAX BOARD WITHHOLDING SERVICES EDUCATION & OUTREACH

The State of California requires property managers to withhold 7% of gross rental income for out-of-state owners with rental property in California.

The Withholding Services and Compliance Section (WSCS) of the FTB has a designated education and outreach team that will join us to discuss:

- Withholding Requirements
- How to Submit Withholding Payments
- Possible Exemptions

If you are unsure about your obligations in this, join us for this informative meeting.

COST -	\$17.00
DATE -	September 17, 2020
TIME -	11:30 AM – 01:30 PM

NARPM Monterey Bay Chapter Officers

March 26, 2021

- | | |
|--------------------|---------------------|
| 1. President: | William Sterling |
| 2. Secretary: | Audrey Wardwell |
| 3. Treasurer: | Fred Nohr |
| 4. Membership: | Carrie Appling-Lake |
| 5. Past President: | Rhonda Navarro |
| 6. Legislative: | Jan Leasure |

**NARPM Monterey Bay Chapter
Annual Financial Statement**

2020	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Beginning Balance:	\$ 7,193.91												\$ 7,193.91
Deposits													
Membership Dues	\$ 192.66	\$ -	\$ -	\$ -	\$ 4,218.24	\$ 247.68	\$ 335.25	\$ -	\$ 71.79	\$ -	\$ 95.83	\$ -	\$ 5,161.45
Membership Dues - Affiliates	\$ 193.73	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 48.01	\$ -	\$ -	\$ 241.74
Meeting Charges	\$ 1,134.35	\$ 1,099.44	\$ 453.36	\$ -	\$ 615.96	\$ 324.20	\$ 324.99	\$ 178.31	\$ 210.73	\$ 178.35	\$ 453.95	\$ 178.71	\$ 5,152.35
Trainings (Fair Housing)	\$ -	\$ -	\$ -	\$ 2,192.08	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,192.08
NARPM National Chapter Incentive	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 430.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 430.00
Other:													
Transfer from prior bank acct	\$ 781.18	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 781.18
Refund Leadership Training (offset)	\$ -	\$ -	\$ -	\$ -	\$ 250.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 250.00
Raffle proceeds	\$ 46.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 46.00
Interest	\$ 0.10	\$ 0.07	\$ 0.07	\$ 0.07	\$ 0.11	\$ 0.17	\$ 0.17	\$ 0.17	\$ 0.17	\$ 0.17	\$ 0.18	\$ 0.19	\$ 1.64
Total Deposits	\$ 2,348.02	\$ 1,099.51	\$ 453.43	\$ 2,192.15	\$ 5,084.31	\$ 572.05	\$ 1,090.41	\$ 178.48	\$ 282.69	\$ 226.53	\$ 549.96	\$ 178.90	\$ 14,256.44
Expenses													
Meeting Expenses	\$ -	\$ -	\$ 1,208.60	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,208.60
Exec Board Meeting Expenses	\$ 111.53	\$ -	\$ 152.84	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 264.37
Training Expenses	\$ 2,800.00	\$ -	\$ -	\$ 825.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,625.00
Web Site Support and Services	\$ 900.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 900.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,800.00
Donations - Community Organizations	\$ 1,700.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,700.00
MCAR Chapter Affiliate Membership	\$ -	\$ 395.81	\$ -	\$ -	\$ 385.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 780.81
Zoom Charges	\$ -	\$ -	\$ -	\$ -	\$ 149.90	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 149.90
Sec of State Statement of Info Filing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 25.00	\$ -	\$ -	\$ 25.00
Leadership Training Reimbursement	\$ -	\$ -	\$ -	\$ -	\$ 250.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 250.00
Bank Service Charge	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 45.00
Square Service Charge/Refunds	\$ -	\$ -	\$ 194.36	\$ 29.13	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 223.49
Total Expenses:	\$ 5,520.53	\$ 404.81	\$ 1,564.80	\$ 863.13	\$ 793.90	\$ -	\$ 900.00	\$ -	\$ -	\$ 25.00	\$ -	\$ -	\$ 10,072.17
Ending Balance:	\$ 4,021.40	\$ 4,716.10	\$ 3,604.73	\$ 4,933.75	\$ 9,224.16	\$ 9,796.21	\$ 9,986.62	\$ 10,165.10	\$ 10,447.79	\$ 10,649.32	\$ 11,199.28	\$ 11,378.18	\$ 11,378.18



California Secretary of State
Electronic Certified Copy

I, ALEX PADILLA, Secretary of State of the State of California, hereby certify that the attached transcript of 2 pages is a full, true and correct copy of the original record in the custody of the California Secretary of State's office.



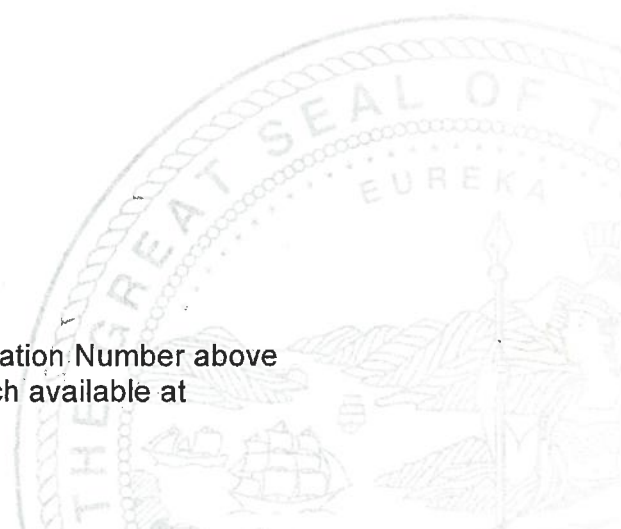
IN WITNESS WHEREOF, I execute
this certificate and affix the Great
Seal of the State of California on
this day of **October 10, 2020**

A handwritten signature in black ink, appearing to read "Alex Padilla".

ALEX PADILLA
Secretary of State

Verification Number: 62G8AE6
Entity (File) Number: C2265620

To verify the issuance of this Certificate, use the Verification Number above with the Secretary of State Electronic Verification Search available at bizfile.sos.ca.gov





California Secretary of State Electronic Filing

FILEDSecretary of State
State of California

Corporation - Statement of Information

Entity Name: MONTEREY BAY CHAPTER, NATIONAL
ASSOCIATION OF RESIDENTIAL PROPERTY
MANAGERS, INC.

Entity (File) Number: C2265620

File Date: 10/08/2020

Entity Type: Corporation

Jurisdiction: CALIFORNIA

Document ID: GK08821

Detailed Filing Information

1. Entity Name: MONTEREY BAY CHAPTER, NATIONAL
ASSOCIATION OF RESIDENTIAL
PROPERTY MANAGERS, INC.
2. Business Addresses:
 - a. Street Address of Principal
Office in California:
140 John Street
Salinas , California 93901
United States of America
 - b. Mailing Address:
140 John Street
Salinas , California 93901
United States of America
3. Officers:
 - a. Chief Executive Officer: William Sterling
140 John Street
Salinas , California 93901
United States of America
 - b. Secretary: Audrey Wardwell
140 John Street
Salinas , California 93901
United States of America

Certificate Verification Number: 62G8AE6
Use bizfile.sos.ca.gov to verify the certified copy.

Document ID: GK08821



California Secretary of State Electronic Filing

Officers (Cont'd):

c. Chief Financial Officer:

Fred Nohr
140 John Street
Salinas , California 93901
United States of America

4. Agent for Service of Process:

Fred Nohr
140 John Street
Salinas , California 93901
United States of America

By signing this document, I certify that the information is true and correct and that I am authorized by California law to sign.

Electronic Signature: Fred Nohr

Use bizfile.sos.ca.gov for online filings, searches, business records, and resources.

Certificate Verification Number: 62G8AE6
Use bizfile.sos.ca.gov to verify the certified copy.

Document ID: GK08821



Monterey Bay Chapter

NARPM MBC 2021 Budget (Draft)

Income

Member dues	\$5,000.00
Affiliate dues	\$1,000.00
Meeting Fees	\$5,000.00
Training Fees	\$2,000.00
Scholarships/Grants	\$ 430.00

Total Income **\$13,430.00**

Expenses

Meeting Expenses	\$2,000.00
Website	\$1,800.00
Meeting speakers	\$4,000.00
Conferences	\$3,000.00
MCAR Membership	\$ 385.00
Operating Expenses	\$1,245.00
Donations	<u>\$1,000.00</u>
Total Expenses	\$13,430.00

Net Income **\$ 0.00**



801 Lighthouse Avenue, Suite 109 Monterey, CA 93940 | (831) 643-9400 | sterlingmonterey.com
DRE ID # 02083542

November 3, 2021

NARPM

RE: 2020 Monterey Bay Chapter Minutes

I am unable to obtain any copies of board meeting minutes for the 2020 calendar year. I stepped into the position of chapter president when ours resigned during her term.

COVID-19 forced us to begin holding the meetings online. I don't know that anyone kept minutes from the meetings.

Going forward, and with my understanding that these will be requested, I will make sure that my chapter complies.



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November 3, 2021

NARPM

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