FLORIDA GULF COAST CHAPTER

The Approach



Professionals Providing Real Estate Solutions

1st Quarter Chapter Meeting & CE Seminar

Four Points Sheraton, Tallahassee Monday, January 15, 2018

When: Monday, January 15, 2018

Where: Four Points Sheraton Downtown

316 W. Tennessee Street, Tallahassee www.fourpointstallahasseedowntown.com

Cost: Members: \$45.00 (Reception & Dinner Meeting)
Nonmembers: \$75.00 (Reception & Dinner Meeting)

State Capital, Tallahassee, FL

REGISTER HERE

Schedule of Events

Monday, January 15:

9:30 AM-12:30 PM: 3-Hour Florida Law (FL 3 CE) 1:30—3:30 PM: The 50% FEMA Appraisal Rule (FL—2 CE)

1 PM-5 PM: Region X Meeting

5:30 PM—8:30 PM: Chapter Meeting Reception and Dinner Meeting

Tuesday, January 16:

8 AM—9:30 AM: VALUEvent Breakfast Meeting

9:30 AM: Region X 2017 VALUEvent Legislative Day (details on page 3)

Meeting Program: The 1st Q chapter membership meeting, cocktail reception and dinner will be held following the Region X Meeting and the educational offerings at the Four Points Sheraton in Tallahassee. We will have a quick, high-level overview of legislative issues and proposed bills with State Representatives Matt Caldwell and Ben Diamond, with focus on any bills that affect real estate or appraisal, with a short Q&A. Region X Chair, Val Chiasson, MAI will be on hand for any national updates. Other guests for the evening will include the AI Region X Lobbyist, Trey Goldman; the AI National Manager of State and Industry Affairs, Scott Dibiasio. We are very honored to have Representatives Caldwell and Diamond as well as these national and regional representatives at the meeting. It should be very informative with all the latest important updates and one you need to attend—register today!

Note—Due to the legislative session, there are limited <u>sleeping rooms</u> available at the Sheraton. We have a block of rooms available until <u>December 25th</u> for a rate of \$189/night. There are also several other hotels nearby.

We hope to see you at the 1st Quarter North chapter meeting in Tallahassee! Stay informed and all the issues of importance to us, locally, state-wide and nationally.

REGISTER TODAY

2018 Officers & Directors

President

Wesley Sanders, MAI, AI-GRS
Vice President

Julie Battaglia, MAI, AI-GRS

Treasurer
Rachel Zucchi, MAI
Secretary

Brian Zamorski, MAI

Directors

Andrew Skinner, MAI, SRA Robert Klein, MAI John Fabian, MAI Michael Twitty, MAI Patricia Whittington Patricia Staebler, SRA Timothy Sunyog, MAI Ed W. Smith, MAI Don Saba, SRA, Ex Officio

Region X Representatives

Julie Battaglia, MAI
Ned Palmer, MAI
Dan Richardson, MAI
Patricia Staebler, SRA
Andrew Skinner, MAI, SRA
Rachel Zucchi, MAI
Jennifer Marshall, SRA, AI-RRS
Ed W. Smith, MAI
Wes Sanders, MAI (President)

Committee Chairs

Admissions: Jennifer Marshall, SRA, AI-RRS Bylaws: Patricia Staebler, SRA Finance: Rachel Zucchi, MAI Guidance: Brad Saucier, MAI Education: Julie Battaglia, MAI & Jason Schultz, MAI Govt. Relations: Devon Carter, MAI Univ. Relations: Bruce Cumming

Newsletter: B. Zamorski / Nancy Bachor Public Relations: Brian Zamorski

Chapter Executive Director

Nancy Bachor (813) 962-4003 info@gulfcoastai.org

Region X Officers

Val Chiasson, MAI, SRA, Chair Nick Pilz, MAI, SRA, Vice Chair Lauren Dowling, Region ED



President's Message, Wesley Sanders, MAI, AI-GRS



Happy Holidays and Best Wishes for a prosperous 2018 to all of you and your families. It is a great honor to put together this message and serve as the 2018 President of the Florida Gulf Coast Chapter of the Appraisal Institute. With the current Officers, Board of Directors, and Committee Chairs, I believe we are on the path of another great year as a chapter through following the solid leadership trajectory this chapter has enjoyed over the years. Thanks again for all those that volunteered to served the chapter in 2017 and welcome to those serving in 2018. Thanks to Nancy Bachor, our Executive Director for guiding us through. If you are interested in helping on a committee and learning more about the chapter, please contact Nancy or any of the officers for more information.

As one of the largest and financially sound chapters, the focus of our leadership in 2018 will be to add membership value. In 2017, we had just under 350 designated members, and almost 120 non-designated members, and almost 120 non-designated members.

bers. Our members stretch from the Florida Panhandle to Fort Myers. With our geographic diversity, we have decided to have five meetings in 2018. Our goal is to have the highest meeting and class attendance that we have ever had. Please check out the NEW Chapter Member Pricing on USPAP and FL Law for select offerings in 2018. The prices are heavily discounted for early registration for our members only. We are also looking for sponsors for all five chapter meetings- please contact Nancy for sponsorship opportunities. This allows our members and vendors to showcase valuable information that could be helpful to us, and it allows us to have better meetings at lower costs. We strive to keep our dues drastically lower dues than other chapters, but need our members help by attending the chapter meetings and education. We hope all of these things bring value to your Florida Gulf Coast Chapter membership.



I am very excited about our January 15th meeting and the 2018 VALUEvent on the 16th. Guest speakers at the reception will include Florida Representative Ben Diamond (D) of St. Petersburg and Florida Representative Matt Caldwell (R) of North Fort Myers, who is an appraiser and is currently running for Commissioner of Agriculture. There is a proposed bill that would cap the time for 'discovery' under the statute of limitations for appraisers in Florida. This would be great for appraisers in Florida, and we need your help to get it passed. The VALUEvent breakfast is FREE for AI members, so please sign up today. We will be continuing our Grass Roots Lobbying efforts after the breakfast by meeting with elected officials and their staff, and asking them for support on bills affecting the appraisal industry. Last year's VALUEvent and government relations efforts lead to several key changes in Florida appraisal legislation. Membership participation is key to making positive changes in our evolving industry.

Thanks again for everyone who volunteers their time on committees and in leadership, as well as all the members who come to the meetings and support the chapter through education attendance. I look forward to seeing all of you at functions throughout 2018.

Government Relations, Wesley Sanders, MAI, AI-GRS—Region X Chair

2018 VALUEvent - Tuesday, January 16, 2018

Appraisal Institute members are invited to the 3rd annual, <u>Valuation-Appraisal - Legislative Update</u> <u>Event (VALUEvent)</u> in Tallahassee, FL, hosted by the Appraisal Institute's Region X and the Florida Gulf Coast Chapter.

The Appraisal Institute's **Florida Gulf Coast Chapter** will hold its 1st Quarter chapter meeting, reception and dinner on Monday, January 15th from 5:30 pm—8:30 pm at the Four Points Sheraton Downtown. We encourage members to network and talk about legislative issues facing the industry, and how we can make the appraisal industry better. We will have a quick, high-level overview of legislative issues and proposed bills, then focus on any bills that affect real estate or appraisal, with a short Q&A with Florida State Representatives and appraiser Matt Caldwell of N. Ft. Myers and Ben Diamond (D), of St. Petersburg. Matt Caldwell is currently running for Commissioner of Agriculture. Other guests will include the AI Region X Lobbyist, Trey

Goldman; the Al Manager of State and Industry Affairs, Scott Dibiasio

from Washington D.C. We hope you will be there.

On **Tuesday morning, January 16th**, the Appraisal Institute's Florida Region X, is sponsoring the **VALUEvent** breakfast from 8:00 -9:30 a.m. at the Four Points Sheraton. Any Appraisal Institute member from Florida is encouraged to attend this event. Attendance will be limited to the first 45 participants that **RSVP HERE** or on the Florida Gulf Coast Chapter's website. There is no cost for Region X (Florida) members to attend the VALUEVENT breakfast. We will have guest speakers talk to the group about reaching out to their state representatives, how we can help them, how to present topics or propose legislation, possible obstacles, etc. We will also hand out talking



2017 VALUEvent

points on any pending legislation affecting the appraisal industry to leave with the elected officials.

After the breakfast, we plan to have our members meet with their elected Representatives to talk about any bills or issues facing the appraisal industry and be a point of contact for them with any appraisal questions. We will have an informal lunch for those that would like to meet and de-brief any feedback received at 12:30 p.m. near the Capital.

Be on the lookout for **VALUEvent** update emails over the next few weeks with a **Call to Action** to help contact your elected official and set a meeting in Tallahassee. We hope to see many of yu there to participate in this very important event.

<u>Four Points Sheraton Reservations</u>: There is a sleeping room block available until December 25th. https://www.starwoodmeeting.com/events/start.action?id=1712018662&key=1FA7F98F.



Government Relations, Devon Carter, MAI, Chapter Committee Chair

On a national level, Congress has put together a tax reform bill, expected to be signed by President Trump. There will be some impact to the industry due to reduction of the property tax and mortgage interest deductions for mortgages over \$750,000; however, these should be at least partially offset by the reduction of the corporate income tax rate from around 35% to about 21%. How the reforms could affect valuation issues is yet to be seen.

On the state level, a bill has been introduced to limit the time appraisers are liable for disciplinary and/or administrative actions. The bill amends the existing statutes in the following manners: First, action recover potential damages from an appraiser must occur within one year of the discovery of the error or omission. Second, action(s) must occur within five years of the date of the report.

Administrative complaints in regard to an appraiser's alleged violation(s) of section 475.624, as related to an appraisal, must be filed within three years of the completion date of the appraisal, again within one year of the discovery.

Currently, actions can begin up to two years of a discovery and there are currently actions being filed on appraisals over ten years old. Many of these suits have nothing to do with valuation, rather, a minor USPAP violation is being used by companies which purchased the right to sue for pennies on the dollar. This bill would be beneficial to our industry, especially considering language some lenders are requiring, which provides a seemingly open-ended issue of liability to appraisers. There may be some minor changes before the bill is voted on; however, there is strong support by Florida AI chapters for this legislation. If passed, the changes would take effect July 1, 2018.

Another bill making its way through Tallahassee proposes to extend portability of assessment for homeowners who relocate, from two to three years. This benefits homeowners in that sellers who transact near the end of a calendar year essentially have the portability window reduced due to the January 1 assessment dates. This bill reinforces the intent of the original statue to allow at least two years to purchase a new homestead property.

Another bill clarifies the timing of impact fees during the development cycle. In recent years, some localities have started collecting these fees earlier in the development process. This potentially creates burdens for the developer as impact fees may be assessed even prior to the issuance of a building permit. As summarized, this bill would mandate that assessment fees may not be collected by local governments until a building permit is issued. The latter two bills should have little effect on valuation issues.

On a more personal note, 2018 is quickly approaching. As the incoming chair of the Government Relations Committee, I will do my best to keep everyone informed of what is going on legislatively. If there are local issues that should be made known to a wider audience, please feel free to forward any information to me. I also hope the new year brings great opportunities to everyone.

Jobs Board

SENIOR APPRAISER. The Property Tax Oversight Program for the State Department of Revenue has an immediate position available for Senior Appraiser in the Tampa, Orlando, or Fort Myers offices. The ideal candidate would have at least 4 years of commercial appraisal experience, and be an active Florida State Certified General Appraiser. Candidates must be detail oriented, have excellent communication skills, a strong writing ability, time management skills, problem solving skills, and must be computer proficient in Microsoft Office Suite. The State of Florida offers a competitive compensation package, health benefits, company resources, telework agreement, and a retirement plan. Those interested in the position may follow the link noted below to submit an on-line application using the State's People First system: https://jobs.myflorida.com/job/FORT-MYERS-REV-SENIOR-APPRAISER-73000956-FL-33619/447373300/

Only applications submitted through People First will be accepted. This job post will close at midnight on Wednesday, **December 27**th. Contact information: John Wilson, 813-664-4025, John.Wilson@floridarevenue.com.

Pinellas County Property Appraisers Office. The Pinellas County Property Appraiser is seeking candidates for two Appraiser 1 positions. This is field and office work of routine difficulty in the gathering of property data to assist in estimating residential property values for ad valorem purposes. Work involves measuring building structures and appurtenances, drawing sketches to scale, identifying structural features and characteristics, making quality judgments, conducting inventories, and recording descriptive data. Click Here for all details. Application deadline: December 31, 2017 https://employment.pinellascounty.org.

2018 Committee Chairs

Admissions: Jennifer Marshall, SRA, AI-RRS

Bylaws: Patricia Staebler, SRA
Candidate Guidance: Brad Saucier, MAI

Education: Julie Battaglia, MAI, AI-GRS

and Jason Schultz, MAI

Finance: Rachel Zucchi, MAI Government Relations: Devon Carter, MAI Nominating: Don Saba, SRA

Programs: Julie Battaglia, MAI, AI-GRS

Public Relations: Brian Zamorski, MAI
University Relations: Bruce Cumming
Website / Social Media: Ned Palmer, MAI

Newsletter: Brian Zamorski/ Nancy Bachor

2018 Florida Gulf Coast Chapter Meetings

Mark Nork Save the dates!!

1st Quarter North Meeting - January 15 - Tallahassee 1st Quarter South Meeting - March 1 - Tampa 2nd Quarter Meeting & Elections - June 14 - Ft. Myers 3rd Quarter Meeting - August 24 - Sarasota 4th Quarter Meeting & Installation - November 9 - St. Petersburg

Education, Julie Battaglia, MAI, AI-GRS and Jason Shultz, MAI, Co-Chairs



Julie Battaglia, MAI, AI-GRS

First of all, we would like to thank everyone who attended Florida Gulf Coast Chapter education in 2017 and supported the chapter programs. We provide top-notch instructors and our chapter is o1ne of the best in the country. 2018 will be a state recertification deadline year, so we have lots of new offerings planned. As always, classes will be added if any timely topics arise. Remember that it is never too early to begin accumulating your CE hours for the renewal deadline, which will be November 30, 2018. Don't let it sneak up on you.

We would like to give a big THANKS to Gary Scott, SRPA, SRA for his many years of service to the chapter as Education Chair. Gary decided to step down this year and the education committee will now be headed up by Co-Chairs, Julie Battaglia, MAI, AI-GRS and Jason Schultz, MAI, both from Tampa in addition to committee members Karen Goforth, MAI and Joel Salley, SRA. We will try our best to fill Gary's shoes.

We are excited to start off the year with two interesting seminars which will be presented in conjunction with the 1st Quarter Meeting in Tallahassee on Monday, January 15th. Both seminars are approved for Florida CE credit. The 3-Hour Florida Law will be presented in the morning and the 2-hour 50% FEMA Rule Appraisal will be presented in the afternoon.

In March, we will offer Florida Law and the 7-Hour USPAP Update in Tampa. These classes will also be offered in Ft. Myers in April, Sarasota in May, Tallahassee in June, Destin in September and back to Tampa in October. So you will have plenty of opportunities to take these required classes. Here is the great news....your Board of Directors voted to offer the Florida Law and the USPAP classes at a special discounted price for members of the Florida Gulf Coast Chapter. When you register for these specific classes, you will automatically receive the FGC chapter member discount price.

In addition to the Law and USPAP classes, we have a variety of new chapter-developed seminars with a variety of topics scheduled throughout the year in a variety of chapter locations from Destin and Tallahassee down to Ft. Myers. We also have several 1/2 day seminars that will be held in conjunction with each quarterly meeting.

In October, we will again offer the Business Practice and Ethics class.

Our chapter education goal is to give you the best instruction, material and topics on a timely basis. Please review the 2018 education schedule in the newsletter for all the planned offerings in 2018. Sign up for them as early as possible to on-line education, many of you have told us you still desire a classroom setting. Your chapter exists primarily because of classroom education. We receive very minimal funding from National for the on-line programs. Our education program helps keep our chapter dues one of the lowest in the country. You can help keep our chapter financially stable by supporting our programs. Get what you need locally.

Check the website often for any new additions to the education schedule and other chapter news. The Florida Gulf Coast Chapter website can be found at www.gulfcoastai.org.

Questions? Please call the chapter office at (813) 962-4003 or email Nancy at info@gulfcoastai.org or contact education chairs Julie Battaglia or Jason Schultz with any questions or suggestions. To register for classes: http://

Are you interested in developing a 2—3 hour seminar? We are always looking for interesting 2 - 3 hour topics. Please consider developing a continuing education (CE) program that would be beneficial to our appraisers and the industry.

Candidate Guidance, Brad Saucier, MAI, Chair

Candidates: Your Annual Minimum Progress is shown in the form of a graph on our MY AI ACCOUNT page. The chart is located in the right-hand column, and the display shows how many requirements you must complete (blue bar) and how many requirements you have already completed (gold bar). Check your Candidate Status Report for a list of remaining designation requirements.

2018 Capstone Program— for the candidates seeking the MAI designation, please note that the General Demonstration Report—Capstone Program—will be offered in just a few locations this year. The first offering will be held in Orlando, FL on February 19—25, 2018. Two other offerings will be held in Chicago (April) and Denver (September). For more information on the Capstone Program and the other options, there is a new Capstone page online, which makes it easy to see the schedules, registration deadlines, etc. Click Here.

Experience Requirements—The purpose of the Appraisal Institute Experience Requirements is to determine if a Candidate for Designations work meets the requirements specified in applicable AI Regulations, Policies, and Procedures, including Significant Professional Responsibility, Reasonable Relationship of Hours, and the Appraisal Institute Standards of Professional Appraisal Practice (or other relevant criteria). Candidates should be open to listening to and exchanging information with the Experience Screener. The Experience Requirement and interview is a learning process, whether or not your credit is approved. You likely will come away with new ideas for reporting and possibly a better understanding of theory and techniques.

Reports must be submitted in their entirety, which means that the report is to be submitted just as it was sent to the client. Reports are not to be edited or altered in any way for the experience process. All work for which experience is claimed must have been performed for a business purpose (mock experience and mock review experience is ineligible).

The following members of the Florida Gulf Coast Chapter have recently received their designation: Roy J. Martinez, SRA (Tampa), and Liza L. Hoover, MAI (Tampa). Congratulations!

We currently have 49 candidates for designation and 4 members seeking the review designation. We ask that our designated members and candidates encourage any non-designated appraisers to consider getting any AI designation and contact the Candidate Guidance Committee if we can answer any questions they may have and/or explain the many benefits of Appraisal Institute affiliation and designation.

2018 Comp Exam Dates

Submit your applications for 2018 exams by deadline dates below:

April 1—April 30, 2018: Application Deadline—February 20, 2018 August 1—August 31, 2017: Application Deadline—June 20, 2018

November 1—November 30, 2017: Application Deadline—September 20, 2018

Questions? comp@appraisalinstitute.org or call (312) 335-4111

Click Here for Comp Exam Information

Examinees must take ALL required modules within their chosen 30-day window—transfers and refunds are NOT permitted.

Candidates for Designation

CE Requirements

Candidates and Practicing Affiliates must complete 70 hours (350 points) of continuing education for every five-year cycle. Designated members must complete 100 hours (500 points) of CE every 5-year cycle. The points system offers an incentive to individuals who attend advanced education. Al will now reward individuals who take and pass exams. The system's tiered point structure allocates higher point values to courses and seminars defined as advanced education. For more information, visit the Al website.

Generally, 1 hour of CE = 5 points (1% of 500 points) or more. This formula is also used for education taken outside of AI, which members can add on their own by logging onto the website and clicking: Add Credit to My AI CE Log. USPAP and Business Practice & Ethics are each valued at 35 points.

2018 Education Schedule

Florida Gulf Coast Chapter



Date	Class	Instructor		
January 15	1st Quarter North Chapter Meeting and VALUEvent—Tallahassee A.M. Seminar: 3-Hour Florida Law P.M.: The 50% FEMA Appraisal Rule	Clay Ketcham, MAI Patricia Staebler, SRA		
March 1	1st Quarter South Chapter Meeting - Tampa Seminar: Parking & Its Impact on Florida Properties	William "Ted" Anglyn, MAI		
March 27	Florida Appraisal Law - Tampa	Tim Andersen, MAI		
March 28	7-Hour National USPAP Update - Tampa	Tim Andersen, MAI		
April 11	Florida Appraisal Law—Ft. Myers	Kenneth G. Foltz, MAI		
April 12	7-Hour National USPAP Update - Ft. Myers	Kenneth G. Foltz, MAI		
April 16	Real Estate Damages - Tampa	Randall Bell, Ph.D., MAI		
April 26	Solving Land Valuation Puzzles - Destin	Vincent Dowling, MAI		
May 2	Florida Appraisal Law - Sarasota	Tim Andersen, MAI		
May 3	7-Hour USPAP Update - Sarasota	Tim Andersen, MAI		
May 11	Solving Land Valuation Puzzles - Tampa	Richard Borges, MAI, SRA		
June 6	Florida Appraisal Law - Tallahassee	Clay Ketcham, MAI		
June 7	7-Hour USPAP Update - Tallahassee	Clay Ketcham, MAI		
June 14	2nd Quarter Chapter Meeting & Election - Ft. Myers Seminar: Eye of the Hurricane: Understanding an Investigation by a State Regulatory Board Agency	Clay Ketcham, MAI		
July 13	Valuation Resources for Solar Photovoltaic Systems (A.M.) What's New in Residential Construction (P.M.)	Sandra K. Adomatis, SRA		
August 24	3rd Quarter Chapter Meeting - Sarasota Seminar: 3-Hour Seminar TBA			
September 12	Florida Appraisal Law - Destin	Clay Ketcham, MAI		
September 13	7-Hour USPAP Update - Destin	Clay Ketcham, MAI		
September 27	TBA - Tallahassee	TBA		
October 3	Florida Appraisal Law - Tampa	Clay Ketcham, MAI		
October 4	7-Hour USPAP Update - Tampa	Clay Ketcham, MAI		
October 25	Business Practice & Ethics - Tampa	Ray Krasinski, MAI		
November 9	4th Quarter Chapter Meeting - St. Petersburg Seminar: Eye of the Hurricane: Understanding Investigation by State Agency	ТВА		

To register for any of the above classes, go to: http://www.appraisalinstitute.org/education/FloridaGulfCoast.aspx Questions? Call chapter office at (813) 962-4003 or email info@gulfcoastai.org

Florida Gulf Coast Chapter, P. O . Box 273994, Tampa, FL 33688

Comprehensive Exam Prep

Gary DeWeese, MAI, and an instructor for the Appraisal Institute for more than 20 years, is offering his Comp Exam prep material for sale. The cost is \$300 for the Income, \$150 for the Sales, \$150 for the Cost/HBU and \$150 for the General module material. If you purchase the first 3 modules, the General module material is free. The material is based on multiple choice type problems with detailed solutions illustrated. The material is electronically delivered the same day as ordered.

For more information about the material, to read student reviews, and learn how to order go to www.garydeweese.com or contact Gary directly at garydeweese@comcast.net or 925-216-8751.

The materials were developed by Gary DeWeese and are not sponsored or endorsed by the Appraisal Institute

Florida Real Estate Appraisal Board Meetings

2018 General Meetings

- Monday, February 5, 2018
- Monday, April 9, 2018
- Monday, June 4, 2018
- Monday, August 6, 2018
- Monday, October 1, 2018
- Monday, December 3, 2018

The Division of Real Estate is now able to <u>live stream</u> their meetings. The streaming is not recorded and it has limited space at this time. If you are unable to access the meeting, please try again later as access may become available during the day. If you have connected to the live stream and no longer wish to view the meeting in progress, please be sure to disconnect to allow others to access the live stream. http://www.myfloridalicense.com/dbpr/re/FREABMeetings.html.

If you wish to have printed materials to reference during the meeting, please visit the website www.myfloridalicense.com > Doing Business with Us > Real Estate Division Page > Florida Real Estate

Appraisal Board > Meetings & Workshops, and print all publicly available materials as early as 7 days before the date of the meeting. The department endeavors to minimize paper usage in all business practices. If you plan to attend for CE credit, you will need to attend the full day. All FREAB Meetings begin at 8:30 a.m. and are held at the Division of Real Estate Commission Chambers in Orlando unless stated otherwise.

The FREAB invites and encourages all members of the public to provide comment on matters or propositions before the Board or a committee of the Board. The opportunity to provide comment shall be subject to Rule 61J1-7.020, Florida Administrative Code. To submit written notice, send to the attention of *FREAB Public Comments* via email to: realpublicrecords@myfloridalicense.com or fax to 407-317-7245.













Knowledge. Experience. Integrity. The MAI, SRPA, SRA, AI-GRS and AI-RRS designations represent advanced knowledge. They stand for years of proven, real-life real estate valuation experience. Any they always mean a commitment to strict professional ethics and standards.

2018 Leadership - Florida Gulf Coast Chapter

The following individuals were elected to serve the position of 2018 officers, directors and regional representatives for the **Florida Gulf Coast Chapter** and were installed at the **November 3rd** chapter meeting in Clearwater. Their term begins on January 1, 2018. We want to thank them all for volunteering their time to serve in these important positions!

Florida Gulf Coast Chapter - 2018 Officers

President: Wesley Sanders, MAI, AI-GRS Vice President: Julie Battaglia, MAI Treasurer: Rachel Zucchi, MAI Secretary: Brian Zamorski, MAI

Directors (2016-2018)

Andrew Skinner, MAI Michael Twitty, MAI Patricia Whittington

Directors (2017-2019)

Timothy Sunyog, MAI Robert M. Klein, MAI

Directors (2018-2020)

John Fabian, MAI Patricia Staebler, SRA Ed W. Smith, MAI

Region Representatives (2015-2018)

Dan Richardson, PhD, MAI Patricia Staebler, SRA

Region Representatives (2016-2019)

Julie Battaglia, MAI, AI-GRS

Region Representatives (2017-2020)

Andrew Skinner, MAI Ned Palmer, MAI Rachel Zucchi, MAI

Region Representatives (2018-2021)

Ed Smith, MAI

Jennifer Marshall, SRA, AI-RRS

Alternate Region Reps - 2018

Don Saba, SRA
Michael Twitty, MAI
Patricia Whittington
Cristie Garrett, MAI
Karen Goforth, MAI
John Fabian, MAI
Michael Jonas, MAI
Steven Griffith, MAI
Robert Klein, MAI
Brian Zamorski, MAI

AI EDUCATION TRUST

AIET Scholarship Applications

The next Appraisal Institute Education Trust Scholarship deadline is April 1. Two scholarships are available to eligible Candidates for Designation:

- Appraisal Institute Education Trust Al Course Scholarship April 1 & July 1
- Appraisal Institute Education Trust Minorities and Women Al Course Scholarship April 1 & July 1

Please note: It is recommended that, prior to submitting a scholarship application, applicants attend a minimum of two Appraisal Institute chapter meetings annually. Candidates are eligible to receive one scholarship per calendar year.

Reminder to Chapter Officers, Directors, Committee Members and Region Reps!

Designated members and Practicing Affiliates can log their own Service to the Al. Please remember to log your service through the <u>Al CE Log</u>.

Membership Updates — Florida Gulf Coast Chapter

Congratulations New Designated Member

Liza L. Hoover, MAI, Tampa Roy J. Martinez, SRA, Tampa

Candidates for Designation:

Michael McCarthy, Sarasota

Life Membership:

Gary Scott, SRPA, SRA, Longboat Key Fred M. Keller, MAI, SRA, Panama City

Members Transferred Out:

George F. Tingley, MAI, SRA (to South Carolina)

Member Semi-Retired:

Dan Richardson, Ph.D., MAI, St. Petersburg William F. Jordan, SRA, Bradenton Lawrence J. Golicz, MAI, Lecanto

Members Resigned

James F. Todora, MAI, SRA, Sarasota

Newly Designated Members During 2017:

MAI - 11

SRA - 1

AI-GRS - 2

AI-RRS - 1

Region X's University Relations Committee is gearing up for another successful year. We are in the process of setting up a LinkedIn group where students can view job postings by our members. If you have a job opportunity for students please send the following information to **Ned Palmer**, **MAI** at:

npalmer@floridavaluation.com:

- 1. A description of the job position and responsibilities
- 2. Full time or part time
- 3. When will the position be open (i.e. open to current students, fall grads, spring grads)?
- 4. Office location
- 5. Company contact and contact information
- 6 Company website

1st Q. North Chapter Dinner Meeting & Seminars

Monday, January 15, 2018 ◆ 5:30 PM - 8:30 PM
Four Points Sheraton Downtown, Tallahassee, FL
Register Today!!

2018 VALUEvent—Tuesday, January 16, 2018

VALUEVENT

2018

VALUATION - APPRAISAL LEGISLATIVE UPDATE EVENT







Appraisal Institute Members are invited to the third annual,
Valuation-Appraisal Legislative Update Event (VALUEvent) in Tallahassee, FL,
hosted by the Appraisal Institute's Region X and the Florida Gulf Coast Chapter.

VALUEvent Breakfast sponsored by the Appraisal Institute Region X, Florida Region Tuesday, January 16th, 8-9:30 AM at Four Points Sheraton in Tallahassee

Any Appraisal Institute Region X member is encouraged to attend. Attendance for the VALUEvent breakfast will be limited to the first 45 participants that RSVP HERE, or on the Florida Gulf Coast Chapter's Website. There is no cost for Region X (Florida) A.I. members. We will have guest speakers



talk to the group about reaching out to their state representatives, how we can help them, how to present topics or propose legislation, possible obstacles, etc. The Government Relations Committee will also hand out talking points on any pending legislation affecting the appraisal industry to leave with the elected officials.

After the breakfast, we will meet with our elected Representatives to talk about any bills or issues facing the appraisal industry and be a point of contact for them with any appraisal questions. We will take a picture in front of the Capital Building at 12:30 PM and then have an informal lunch near the Capital for those that would like to meet and debrief any feedback received.

Be on the lookout for a VALUEvent update email over the next couple of weeks with a Call to Action to help contact your elected official and set a meeting in Tallahassee. Template emails and Key Contacts will be provided to the Region Reps.

The Appraisal Institute's Florida Gulf Coast Chapter is hosting a cocktail reception at 5:30 PM and dinner at 6:30 PM Monday, January 18th Four Points Sheraton

To register for the Florida Gulf Coast Chapter Reception and check out the C.E. being offered, CLICK HERE. We encourage members to network and talk about legislative issues facing the appraisal industry, and how we can make the appraisal industry better.

After the cocktail hour, the reception will include a high-level overview of Florida legislative issues and proposed bills, then focus on any bills that affect real estate or appraisal. We will also have an overview of current national and regional A.I. updates presented by Region X leadership. A.I. Manager of State and Industry Affairs, Scott DiBiasio from Washington DC will be presenting national legislative updates and how they affect Florida. Other guests will include the A.I. Region X Lobbyist, Trey Goldman.

A limited Room Block discount at \$189+ is available at Four Points Sheraton, Which can be booked by clicking here: Four Points AI Room Block

For Sunday night rooms at \$139+, call Emily at Four Points Sheraton - (850) 422-4203

Appraisal Institute Unveils Governance Structure Web Page

The Appraisal Institute announced on July 17th that it has launched a <u>new web page</u> providing information about the AI Governance Structure Project Team's recent recommendations to the AI Board of Directors. The page includes a form for Appraisal Institute professionals to provide feedback to the Board.

AI's Board of Directors created a project team in 2015 to make recommendations to the Board for possibly enhancing the overall AI governance structure, and to find the optimum mix of member services and the efficient delivery of those services. The Governance Structure Project Team was directed to focus on determining the best ways to provide member value – including offering greater consistency in member services and experience – considering current market realities.

The project team provided its recommendations to the AI Board of Directors in June 2017. The Board is now seeking input from Appraisal Institute professionals. No scheduled end date for the comment period has been set at this time.

Appraisal Institute professionals may visit the <u>web page</u> (log-in required), read the documents there and complete the online form to submit feedback. Please take a moment and review this information. Your feedback is encouraged. Now is the time to let your voices be heard.

Admissions, Jennifer Marshall, SRA, AI-RRS, Committee Chair

For those who are not familiar with it, the SRA designation is the highest residential designation awarded by the Appraisal Institute. Appraisers, who are members of AI, must certify to upholding the Appraisal Institute's Code of Professional Ethics and Standards of Professional Appraisal Practice, which is above and beyond the minimum standards required by the Uniform Standards of Professional Appraisal Practice (USPAP) of a licensed or certified appraiser. This means the Appraisal Institute members are held to a higher standard. They are looking to stand out from the crowd and be the best that the profession has to offer consumers and clients.

I believe now is the time to move forward with pursuing the SRA. There are significant changes on the horizon and you need to be aware of them. If you are interested and have any questions please feel free to contact me via email at jm4632@aol.com or call me at 813-957-3230.

For anyone interested in obtaining an SRA, if you declare your candidacy on or <u>after January 1, 2018</u> there will be additional requirements, which include a residential comprehensive exam as well as elective requirements.



Al Advises on Disaster Appraisal Exemptions, Collateral Risks

The Appraisal Institute on Oct. 25 advised real estate appraisers servicing areas affected by recent disasters that the <u>exemption from appraisal requirements</u>recently issued by federal bank regulatory agencies does not itself reduce collateral risks. Rather, regulated financial institutions are seeking greater flexibility in reviewing loan applications and loans held in portfolios.

Al noted that appraisal expertise still is essential to evaluating risk, especially since collateral risks likely have increased due to potential environmental damage, dislocation and material changes in market conditions.

Banks and their regulators want to avoid being in a position of declining loan applications, a forced margin call or failing to help with economic recovery because of statutory appraisal obligations. However, their collateral risks are real — and potentially even greater now than before the hurricanes. According to the Appraisal Institute, demand for appraisal and valuation services is expected to increase, and the assignments likely will be complex and require the services of experienced analysts.

The Appraisal Institute pointed out that appraisers will continue to be the first line of defense for banks because it makes good business sense to understand collateral risks following major disaster events such as hurricanes Harvey, Irma and Maria.

On a related note, AI's <u>Guide Note 10: Development of an Opinion of Market Value in the Aftermath of a Disaster</u>can help appraisers servicing areas affected catastrophic events.

AI Benefits

Are you taking advantage of the benefits that the Appraisal Institute has to offer?

Designated Members, Candidates for Designation and Affiliates have access to exclusive discounts and an insider connection to exciting Appraisal resources:

- ◆ Insurance
- Education
- Business Tools
- Marketing & Publications

- Travel
- AI Services
- Networking & Leadership Development

Learn More

Advisors Still Needed - Candidate for Designation Program

Become an Advisor! We need designated members to step up and become an advisor. Please consider applying to serve as an Advisor in the Candidate for Designation Program. Once you have applied and are approved as an Advisor, the national office will place you on a list of approved Advisors. We currently have 31 designated members who are approved advisors, however there are only few of these advisors who have remaining slots available. We currently have a total of 62 candidates.

A Candidate may request a particular Advisor or the Appraisal Institute will identify a potential Advisor for the Candidate and make the assignment. The Appraisal Institute will make the final approval as to who will serve as the Advisor for a specific Candidate. Candidates: Don't delay—choose your advisor today!

An Advisor can receive up to 125 points of CE credit per Al CE cycle for service to the Appraisal Institute. Please notify the Admissions Department of your interest at admissions@appraisalinstitute.org. A free online orientation is available for potential advisors. Advisors serve as a resource to the Candidate, providing knowledge and expertise.

Download the PDF that will explain the process. WE NEED YOU!

For more information on the Appraisal Institute candidate advisor program, please contact the Admissions Department at admissions@appraisalinstitute.org or <u>click here</u>.

Advisors & Candidates: Remember to check your Appraisal Institute account page online to check your status and/or record your contacts.

Practice Examination Questions for Real Estate Appraisers

Available in print and as an online program.





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Become an Advisor

Updated Designation Descriptions Adopted by the National BOD

MAI Membership Designation

The MAI membership designation is held by professionals who can provide a wide range of services relating to all types of real property, such as providing opinions of value, evaluations, review, consulting and advice regarding investment decisions, among others. Property types may include commercial, industrial, agricultural, residential, vacant land and others.

SRPA Membership Designation

The SRPA membership designation is held by professionals who can provide a wide range of services relating to all types of real property, such as providing opinions of value and review, among others. Property types may include valuation of commercial, industrial, agricultural, residential, vacant land and others.

AI-GRS Membership Designation

The AI-GRS membership designation is held by professionals who can provide reviews of appraisals of a wide range of property types, including commercial, industrial, agricultural, residential, vacant land and others.

SRA Membership Designation

The SRA membership designation is held by professionals who can provide a wide range of services relating to residential properties, including providing opinions of value, evaluations, reviews, consulting and advice regarding investment decisions, among others.

AI-RRS Membership Designation

The AI-RRS membership designation is held by professionals who can provide reviews of residential appraisals. To phase in these new basic designation descriptions as practicable, such as when current hard-copy materials are scheduled for re-printing.



SIGN UP TODAY TO RESERVE YOUR COMPANY'S SPONSORSHIP PACKAGE FOR 2018 CHAPTER EVENTS—SPACE IS LIMITED

Thank you for sponsoring the Florida Gulf Coast Chapter events as listed below. We extend our thanks and gratitude to our partners and professionals in the community for their continued support and generosity. Sponsorship pricing indicates dinner or lunch meeting events.

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2018 Meeting Dates:	0	Tallahassee	Tan	npa	P	. Myers	S	arasota	□ November 9 St. Petersburg (Dinner)
Please indicate your	lev	el of spons	orship b	elow	per m	eeting:	(Spoi	nsor 4 me	eetings and get one FREE)
Dinner Meeting:		Presenting	(\$500)		Gold	(\$300)		Silver	(\$200)
Lunch Meeting:		Presenting	(\$250)		Gold	(\$150)		Silver	(\$100)
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Dinner & Installation — November 3, 2017 4th Quarter Chapter Installation Meeting • Sheraton Sand Key, Clearwater Beach



Board of Directors Budget Meeting in November



MAI Certificate presented to Jason Schultz



Certificate presented to Brad Saucier, MAI



MAI Certificate presented to Rob Hicks by Don Saba



Karen Goforth, MAI receiving the *Henry Entreken Lifetime Achieve*ment Award from Henry Entreken, MAI and Don Saba, SRA



Presentation to Education Chair Gary Scott, SRPA by President Saba



Don Saba, 2017 Chapter President presented with the President Plaque by incoming president Wes Sanders, MAI



Installation ceremony officiated by Val Chaisson, MAI, Region X



Guest speaker, Pinellas Property Appraiser Mike Twitty, MAI



Installation of the 2018 Leadership for the Florida Gulf Coast Chapter held at the 4th Quarter Meeting in Clearwater

1st Quarter North Meeting of the Florida Gulf Coast Chapter Monday, January 15, 2018 - Tallahassee, FL

Please join us for the 1st quarter chapter meeting!

Location

Four Points Sheraton Downtown Tallahassee 316 W. Tennessee Street, Tallahassee, FL

Schedule of Events

9:30 AM—12:30 PM Florida Law (3 FL CE)

1:30 PM - 3:30 PM The 40% FEMA Appraisal Rule (2 FL CE)

1 PM—5 PM - Region X Meeting



Four Points Sheraton, Talahassee

5:30 PM—8:30 PM Chapter and Region X Reception and Dinner Meeting and Program

Fees (Early Registration Discounts available until January 10th)

Seminars: Florida Law: Members \$45 | Nonmembers \$75 | 50% FEMA Appraisal Rule: Members \$75 | Nonmembers \$90

Chapter Dinner Meeting: Members \$45 | Nonmembers \$75 (early fees available until 1/10/18)

Meeting Program: The 1st Q. Chapter Reception and Dinner will be held from 5:30 PM—8:30 PM. Cash bar will be available. Dinner price includes one drink ticket. Two state representatives will be available at the dinner meeting to update us on pending legislation.

Tuesday, January 16, 2018

8:00 AM—VALUEvent Breakfast at Four Points Sheraton and Lobbying at State Capital

Directions to hotel: (from Tampa Area)

- Take I-75 North to I-10 . Follow Interstate 10 West.
- Take Exit 209A / US 90 West and continue 8.2 miles.
- Turn left onto Monroe Street. And then left onto Tennessee to hotel on the right.

Sleeping Rooms at Four Points Sheraton: Click Here

CLICK TO REGISTER
SIGN UP EARLY FOR DISCOUNT

R.S.V.P. Required!

Registration A	pplication —	January	15 —	1st O	Chapte	er Meetin
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Credit Card: #	Exp. Date CCV:

