

# The Approach



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## 3rd Quarter 2018 Chapter Meeting & Education



**When:** **Friday, August 17, 2018**

**Where:** **Marina Jacks, 2 Marina Plaza, Sarasota, FL 34236**

**Cost:** **Lunch Meeting + Program Only:** \$28.00 (Early) \$32 (after 8/10/18)  
**Lunch Meeting Program + 3-Hour CE:** \$125.00 (Early) \$135 (after 8/10/18)

### Schedule of Events

9:30—11:15 AM: Board of Directors Meeting  
11:30 AM—12:45 PM: Chapter Membership Lunch Meeting & Program  
1 PM—4 PM: Seminar: Insurance Appraisals: Report Contents & Valuation (3 CE, #0009808)

**Meeting Program:** The 3rd Q chapter lunch and membership meeting will be held at Marina Jacks in Sarasota, FL. Our guest speaker at the lunch meeting will be [Jim Cirillo, National Director of Community Insurance & Risk Management for CBIZ Insurance Services](#) in Sarasota. Read more details on our meeting speaker in this newsletter. In addition, our officers will update us on all the latest chapter, region and national news from the recent Appraisal Institute region and national conference held in Nashville. It should be a very informative meeting and networking opportunity — [register today!](#)

**Seminar:** [Insurance Appraisals: Report Contents & Valuation](#) is a newly developed seminar by Patricia Staebler, SRA and is approved for 3 hours of Florida CE and 15 points of Appraisal Institute CE credit. Participants will learn why insurance appraisals are important to condominium associations and other clients. Seminar Developer and instructor—**Patricia Staebler, SRA, Staebler Appraisal, Bradenton, FL.**

We hope to see you at the 3rd Quarter meeting at Marina Jacks in Sarasota! Stay informed on all the issues of importance to us, locally, state-wide and nationally. Candidates for Designation, Practicing Affiliates and designated members are encouraged to attend at least one chapter membership meeting each year. This should be a very interesting day of events. We hope to see you all there!

**REGISTER HERE**  
**3rd Quarter Chapter Meeting**

### 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@gulfoastai.org](mailto:info@gulfoastai.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



We have had a busy few weeks with the Appraisal Institute's National Conference in Nashville last week and a FREAB meeting this week. The Region X meeting was productive and informative, as was the joint region meetings. There was also a governance structure update, financial management update, and CEO search update. I look forward to sharing that information with everyone at the next chapter meeting in Sarasota on August 17<sup>th</sup> at Marina Jack!

If you are interested in serving on a committee or board, please visit the AI website and sign up at the Leadership Resource Registry. For 2019, we are particularly focused on those that have not had a previous opportunity to volunteer within AI, both on a chapter and Region X level. Here is a link to the registry: [https://www.myappraisalinstitute.org/myappraisalinstitute/my\\_lrr.aspx](https://www.myappraisalinstitute.org/myappraisalinstitute/my_lrr.aspx). Please also inform Julie Battaglia, the 2019 Chapter President, as she will be coordinating committees for next year.

**Can certified appraisers complete an Evaluation Report outside USPAP (USPAP exempt Evaluations)?** According to the FREAB meeting held this week in Orlando, the Board is unsure. Clarity will be determined through a task force that will be formed to handle the issue.

Please mark your calendar for the final chapter meeting of the year, which will be held on November 9th at the beautiful St. Petersburg Yacht Club. This will be a dinner meeting and will include the installation of the 2019 leadership and program.

Thanks for reading the newsletter, and I look forward to seeing you at Marina Jack in Sarasota in a couple weeks.

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

Designated members and Practicing Affiliates can log their own Service to the AI. Please remember to log your service through the [AI CE Log](#).

### AI Scholarships

The Appraisal Institute Education & Relief Foundation offers a number of [scholarships](#). While some are for college students, many benefit Candidates for Designation. Keep in mind these scholarships are for courses only, not Capstone, not challenge exams or re-exams, and they are not available to Candidates who are re-taking a course they previously attended.

**Interested in sponsoring an event?** *Sponsorship opportunities are available for our chapter meetings. Contact the chapter office for more details! Sponsorships include recognition in email blasts, chapter website, newsletters in addition to recognition at chapter meetings.*

## Chapter Meeting Program Speaker - August 17, 2018

Our guest speaker at the 3rd Q chapter lunch meeting in Sarasota will be **Jim Cirillo**. Jim is the National Director of Community Insurance & Risk Management for CBIZ Insurance Services.



Jim has been in the insurance industry for over thirteen years where he has become an expert in the area of Community Associations. Jim graduated from Florida State University in 2003 with a degree in Social Sciences. In 2008, he co-founded Alliance Insurance of Sarasota, Inc. and has spent the past ten years focusing on Community Association Insurance as well as being a Risk Manager for his association clients.

He will be speaking on pollutants that cause damage to commercial property and what products can be put into place to mitigate the risk exposure. In addition, he will discuss the proper remediation techniques used to alleviate and remove mold fungus, bacteria and pollution properly, and how these issues can affect real estate values and the negative effects it can have on attaining proper coverage

after the loss.

[Register today](#) for all the upcoming events on August 17th. We hope to see you at the chapter lunch meeting and seminar.

## Government Relations, Devon Carter, MAI, Committee Chair

From Washington, President Trump signed a Dodd-Frank reform bill which includes revisions aimed at appraisals. As opposed to simply contacting local appraisers, banks must engage at least three on the bank's approved list in the local market in a timely manner to avoid unscrupulous lenders exploitation of the loophole. Additionally, the current, appraised contributory value of land, rather than the original purchase price, can be included in High Volatility construction loans. Previously, land acquired years ago would be valued at the purchase price without consideration of appreciation.

Several states have rulings that could affect the appraisal world, some good and some worrisome. Although these may not directly affect Florida appraisers, they could set precedent and trickle their way south and east.

First, Michigan now has an 18-month discovery window for potential violations, from the delivery to the client, or the date of delivery to opposing council if the violation was part of expert testimony.

Broker Price Opinions (BPO) are seemingly a gray area when it comes to valuation, and states have differing rulings on their applications. A Nevada court ruled that a BPO can be used to establish the value of real property in a divorce proceeding. Pennsylvania passed a law allowing limited use of BPOs in connection with lender owned properties after unsuccessful auctions, modifications or equity credit lines, short sales or portfolio evaluations.

Things have been pretty quiet on the home front with only a Notice of Development Rulemaking change regarding Florida appraisers and evaluations.

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## Education, Julie Battaglia, MAI, AI-GRS, Committee Chair



Julie Battaglia, MAI, AI-GRS

As you well know, 2018 is a state recertification deadline year, and the Florida Gulf Coast Chapter still has several new offerings on the schedule. The renewal deadline is **November 30, 2018** so don't let it sneak up on you!

We have been very busy this year with several offerings of the required Florida Law and 7-Hour USPAP Update course, which have been held in Tampa, Ft. Myers, Sarasota, Tallahassee and Largo. The upcoming locations will be Destin in September and a final offering in Tampa in early October. As a reminder, the chapter Board of Directors voted to offer the Law and USPAP classes at a special discount price for **Florida Gulf Coast** chapter members this year. When you register for these specific classes,



USPAP class held in Ft. Myers instructed by Ken Foltz, MAI

enter the promo code **CHAPTER**, and you will automatically receive the special FGC chapter member discount price. You will, however, still need to purchase the 2018-2019 USPAP Book directly from the [Appraisal Foundation](#).

We also still have a variety of new chapter-developed seminars planned in Sarasota, Tallahassee, Tampa and a new Appraisal Institute seminar scheduled for St. Petersburg. So you have plenty of opportunities to get your remaining CE hours by November 30th. Patricia Staebler, SRA will present her seminar titled ["Insurance Appraisals: Report Contents & Valuation"](#) on August 17th in Sarasota. Sign up today for this upcoming class. Participants will learn why insurance appraisals are important to condominium associations and other clients. Participants will learn how to perform a commercial valuation on the Core Logic valuation platform. This seminar will be held in conjunction with the 3rd Quarter chapter meeting at Marina Jacks.

Sandy Adomatis, SRA will present two popular residential seminars on September 27th, ["What's New in Residential Construction"](#) and ["Valuation Resources for Solar Photovoltaic Systems"](#) in Tallahassee for 7 hours of CE credit. In October, we will offer the [Business Practice and Ethics](#) class in Tampa to meet your Appraisal Institute CE requirement. We have scheduled the new 3-hour seminar ["Ignorance Isn't Bliss: Understanding an Investigation by State Appraiser Regulatory Board"](#) instructed by Clay Ketcham, MAI at the November 9th chapter meeting which will be held at the St. Petersburg Yacht Club.

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. Sign up for them as early as possible to ensure the minimum attendance needed and to take advantage of the early registration discounts. In this time of expanding 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 very lowest in the country. You can help keep our chapter financially stable by supporting our programs. Get what you need from your local chapter!

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](http://www.gulfcoastai.org). **PLEASE** give us your feedback and/or let us know if there is a specific class or topic you would like to have added to the schedule.

**Questions?** Please call the chapter office at (813) 962-4003 or email Nancy at [info@gulfcoastai.org](mailto:info@gulfcoastai.org) or contact education chair Julie Battaglia, MAI, AI-GRS with any questions or suggestions. We look forward to your feedback. To register for classes, go to: <http://www.appraisalinstitute.org/education/FloridaGulfCoast.aspx>.

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



## 2019 Chapter Election Results

The following individuals were elected at the June chapter meeting to serve the position of 2019 officers, directors and regional representatives for the **Florida Gulf Coast Chapter**. Congratulations to the following:

### Florida Gulf Coast Chapter - 2019 Officers

**President:** Julie Battaglia MAI, AI-GRS

**Vice President:** Rachel Zucchi, MAI

**Treasurer:** Brian Zamorski, MAI

**Secretary:** Patricia Staebler, SRA



### 2018 Nominating Committee

*Don Saba, SRA, Chair*

*Michael Jonas, MAI*

*Joel Salley, SRA*

*Karen Goforth, MAI*

### Directors (2017-2019)

Timothy Sunyog, MAI

Robert M. Klein, MAI

### Directors (2018-2020)

John Fabian, MAI

Ed W. Smith, MAI

Brad Saucier, MAI (*to complete Staebler term*)

### Directors (2019-2021)

Ashlie Dummeldinger MAI

Michael Cliggitt, MAI

Byron Torres

Wesley Sanders, MAI (Ex-Officio)

### Region X Representatives—2019

Ned Palmer (2017-2020)

Andrew Skinner, MAI, SRA (2017-2020)

Rachel Zucchi, MAI (2017-2020)

Ed W. Smith, MAI ((2018—2021)

Jennifer Marshall, SRA (2018—2021)

Michael Jonas, MAI (2019—2022)

James (Matt) Terry, SRA (2019—2022)

Patricia Whittington (2019—2022)

**Julie Battaglia, MAI — Chapter President**

**Alternate Region Reps:** Don Saba, Karen Goforth, Patricia Staebler, Robert Klein, John Fabian, Brian Zamorski, Woody Herr, Michael Twitty, Steve Griffith, Dan Richardson

### 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

SAVE THE DATE

COMING  
UP

## 2018 Florida Gulf Coast Chapter Meetings

*Save the dates!!*

3rd Quarter Meeting - August 17 - Sarasota

4th Quarter Meeting & Installation - November 9 - St. Petersburg

## 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. You can also file an extension request by calling the national office at 312-335-4111 or email to [admissions@appraisalinstitute.org](mailto:admissions@appraisalinstitute.org).

**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).**

We currently have 47 candidates for designation, 64 practicing affiliates and 3 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.

Two candidates have received their designations this year:

- Michael Kelly, SRA
- Jonathan Hurt, MAI

### 2018 Comp Exam Dates

[Click Here](#) for Comp Exam Information

Submit your applications for 2018 exams by deadline dates below :

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

Questions? [comp@appraisalinstitute.org](mailto:comp@appraisalinstitute.org)  
or call (312) 335-4111

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

Questions? Contact [comp@appraisalinstitute.org](mailto:comp@appraisalinstitute.org) or call 312-335-4111.

### 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. AI 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 AI 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.

### 2019 Capstone Programs

Location	Live Dates	Registration Deadline
Southern California	March 11-17, 2019	January 3, 2019
<b>Synchronous*</b>	<b>March 11-17, 2019</b>	<b>January 3, 2019 (Sold Out)</b>
Chicago, IL	June 24-30, 2019	April 18, 2019
Nashville, TN	September 16-22, 2019	July 11, 2019
<b>Synchronous</b>	September 16-22, 2019	July 11, 2019
Philadelphia, PA	November 18-24, 2019	September 12, 2019

*Florida Gulf Coast Chapter, Appraisal Institute*

P. O. Box 273994, Tampa, FL 33688 T: 813-962-4003 Website: [www.gulfcoastai.org](http://www.gulfcoastai.org)

## 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 15	<b>1st Quarter South Chapter Meeting</b> - 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 3	Florida Appraisal Law - Sarasota	Tim Andersen, MAI
May 4	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 12 <i>New Date</i>	<b>2nd Quarter Chapter Meeting &amp; Election</b> - Ft. Myers Seminar: Managing Unusual Appraisal & Litigation Assignments	Shawn Wilson, MAI and Joni Herndon, SRA
July 13	What’s New in Residential Construction (A.M.) Valuation Resources for Solar Photovoltaic Systems (P.M.)	Sandra K. Adomatis, SRA Sandra K. Adomatis, SRA
July 19 July 20	Florida Appraisal Law - Largo 7-Hour USPAP Update - Largo	Patrick Alesandrini, MAI Richard Borges, MAI, SRA
August 17 <i>New Date</i>	<b>3rd Quarter Chapter Meeting</b> - Sarasota Seminar: Insurance Appraisal: Report Contents & Valuation	Speaker: Jim Cirillo, CCIM Patricia Staebler, SRA
September 12	Florida Appraisal Law - Destin	Clay Ketcham, MAI
September 13	7-Hour USPAP Update - Destin	Clay Ketcham, MAI
September 27	Valuation Resources for Solar Photovoltaic Systems A.M. What’s New in Residential Construction P.M.	Sandra K. Adomatis, SRA Sandra K. Adomatis, SRA
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	<b>4th Quarter Chapter Meeting &amp; Installation</b> - St. Petersburg Seminar: Ignorance Isn’t Bliss: Understanding Investigation by State Agency (4 CE Pending)	<i>Installation:</i> Richard Borges, MAI Clay Ketcham, MAI

## 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](http://www.garydeweese.com) or contact Gary directly at [garydeweese@comcast.net](mailto: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, August 6, 2018
- Monday, October 1, 2018
- Monday, December 3, 2018

The Division of Real Estate is now able to [live stream](#) 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](http://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](mailto: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

### *Florida Gulf Coast Chapter - 2018 Officers & Directors*

**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

## Interested in Becoming an Appraisal Institute Instructor?

The Appraisal Institute will hold an **Instructor Qualifying Conference (IQC)** in Chicago this September.

The IQC has two goals:

- 1) To assess the communication and instruction skills of potential AI instructors, and
- 2) To review educational principles and practices for potential instructors in order to teach Appraisal Institute programs effectively. The IQC is the first step one must take to become an approved Appraisal Institute instructor.

Designated members and/or PhD's who currently are not approved to teach for the Appraisal Institute but are interested in completing the process to become a full instructor for AI programs. Completion of program does not guarantee approval to teach.

The IQC will be held on September 21 & 22, 2018 in Chicago, IL. For registration information and requirements, [click here](#).

### **Rodman Schley Elected 2019 Appraisal Institute Vice President**

CHICAGO (Aug. 3, 2018) – Rodman Schley, MAI, SRA, of Denver, was elected 2019 vice president of the nation's largest professional association of real estate appraisers Thursday by its Board of Directors in Nashville, Tennessee.

Schley's one-year term at the Appraisal Institute will begin Jan. 1, followed by one year each as president-elect, president and immediate past president. He will serve on AI's Executive Committee and the policy-making Board of Directors all four years. He also will chair the Finance Committee in 2019 and the National Nominating Committee in 2022.

## Membership Updates – Florida Gulf Coast Chapter

### Congratulations New Designated Members

Carolyn Holman, MAI—**Received AI-GRS**

### MAI Candidate

Nelson P. Taylor, Ft. Myers  
Samantha Medred, Sarasota  
Caroline C. Sutton, Tallahassee



### Practicing Affiliate

Gina Capps, New Port Richey

### Retired

Glen Almcrantz, MAI, Tampa  
H. Rogers Green, SRA, Tallahassee  
Warren Weathers, SRA, Tampa

### Members Resigned

Eugene J. Strutt, Sarasota  
William F. Jordan, SRA, Sarasota

### Deceased

Richard G. Klusza, MAI—Lakeland  
Donna G. Miller, Destin

**Region X's University Relations Committee** has geared 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: [ned.palmer@ngkf.com](mailto:ned.palmer@ngkf.com):

Region X is once again sponsoring the Florida State University Real Estate Trends Conference held October 25-26. Our three attendees will be participating in the speed networking round with the students. Ned Palmer, MAI remains the committee chair for FSU. Please contact him ([ned.palmer@ngkf.com](mailto:ned.palmer@ngkf.com)) if you will be attending the conference or would like to assist later on in the year on the expert panel with the students.

Ryan Zink, MAI has been working on establishing the newly formed University Relations Panel for the Appraisal Institute. As the Chair for 2018, his goal is to promote university relations from the national level by earmarking funds that can be used to sponsor case study competitions and targeted involvement with students at the major universities. Overall, brand awareness is key to bring in new members, and Ryan is laying the groundwork!

Florida International University's masters program is now approved through the AQB; this achievement is due to the efforts of Lee Smalley, MAI (Co-Chair, Region X, University Relations)

University of Central Florida (UCF) is in the early stages of getting the undergraduate and graduate real estate programs approved through the AQB. As well, Ira Bellinkoff, MAI and Hal Katz (UCF Committee Chair) are spearheading writing the Advanced Appraisal course with the goal of making students "turnkey" for job placement. This course is expected to debut in Spring 2019.



**JOIN US!!!**

**3rd Quarter Chapter Luncheon Meeting & 3-Hour CE Seminar**  
**Friday, August 17, 2018 ♦ 11:30 A.M.**

**1 P.M. - "Insurance Appraisals: Report Content & Valuation" (3 CE)**

**Marina Jacks—Sarasota, FL**      **[Register Today!!](#)**

# LDAC 2018

*Hosted by the Appraisal Institute*  
May 16–18



2018 was another great year for the Leadership Development and Advisory Council (LDAC) participants! LDAC, one of the Appraisal Institute's most popular and coveted events, is a gathering of 100 appraisers from around the country to collaborate on vital issues facing our profession and organization. It's a think tank, of sorts where the participants are brainstorming possible solutions to the problems affecting the valuation profession. This year LDAC took place in Washington DC from May 16th through the 18th and was chaired by Rodman Schley, MAI, SRA with help from Steve Henry, MAI, Vice-Chair. The four discussion leaders were Charles Baker, SRA, AI-RRS; Jeffrey Harris, MAI; Michael Lamb, MAI, SRA, AI-GRS, AI-RRS and Jacinto Munoz, MAI, SRA, AI-GRS, AI-RRS. The discussion topics were Perceptions, etc. Peak State for Our Organization (Baker), Best Opportunities for Appraiser in the Future (Harris), Building a Professional Community (Lamb) and Growing Outside the Box (Munoz). The discussions revolved around growing the organization and the industry.

Seven representatives from Florida, including two members, **Rachel Zucchi, MAI** and **Jennifer Marshall, SRA, AI-RRS**, from the FL Gulf Coast Chapter, attended LDAC this year. The event consisted of a Welcome Reception; an Update on Current State of Affairs from our Government Affairs representatives, Bill Garber, Scott DiBiasio, and Brian Rodgers; Discussion/Brainstorming break-out Sessions; and Lobbying our Congressman and Senators, including a cocktail hour which we invited the Representatives and their Aides to attend. It's amazing the fantastic ideas and fun we have while brainstorming current appraisal issues and networking with some of the brightest and most ambitious valuation professionals. It truly is an awesome experience and a great opportunity to see AI in action and all the Organization actually does for their members and the profession as a whole.

We were welcomed by Jim Murrett, MAI, SRA, 2018 President with an Appraisal Institute Update. His presentation included the following highlights:

- Chapter Financial Management and Administration Program update
- AI Chief Executive Officer search
- Government Structure Project Team update
- Appraisal Regulatory Modernization

In our lobbying efforts, we once again focused on modernizing appraisal regulations. The regulatory structure for real estate appraisal has essentially been untouched since the enactment of the Financial Reform, Recovery and Enforcement Act of 1989, and the Appraisal Industry remains one of the most highly regulated professions in the United States. With the decline in appraiser population, AI believes that it is appropriate for Congress to consider how well Federal and State regulations are serving appraisers, consumers and market participants.

We encourage all members of the Chapter who have yet to attend LDAC to consider it. It is a fabulous grass root experience. LDAC 2019 is scheduled for May 15th through the 17th. The 2018 attendees were both 3rd year representatives so we need new interested participants! Please contact Nancy Bachor or this year's participants if you have any interest in participating in 2019 LDAC.

Finally, we want to congratulate Rodman on his recent nomination for 2019 Appraisal Institute Vice President, which will be confirmed with a vote by the Board of Directors at the upcoming national meeting in August being held in Nashville. It is a tribute to the program to have the current chair of LDAC move forward to VP.

#### 2018 LDAC Participants:

- ♦ Jennifer Marshall, SRA, AI-RRS (3rd year Representative)
- ♦ Rachel Zucchi, MAI (3rd year Representative)

# LDAC 2018

Hosted by the Appraisal Institute  
May 16–18



*LDAC Report submitted by: Rachel Zucchi, MAI and Jennifer Marshall, SRA, AI-RRS*



*LDAC attendees representing the AI Florida chapters including Florida Gulf Coast members **Rachel Zucchi, MAI** and **Jennifer Marshall, SRA, AI-RRS** met with representatives for Senator Marco Rubio and Senator Bill Nelson's offices during LDAC week in Washington, D.C. in May.*





## Appraisal Institute Unveils Governance Structure Web Page

The Appraisal Institute announced in July 2017 that it launched a [new web page](#) 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 [web page](#) (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](mailto:jm4632@aol.com) or call me at 813-957-3230. For anyone interested in obtaining an SRA, if you declare your candidacy on or [after January 1, 2018](#) there will be additional requirements, which include a residential comprehensive exam as well as elective requirements.

## Jobs Board

**Tampa. Tropical Valuation Advisory** is looking for **Certified General Appraisers & Trainees** at our Tampa office. Tropical Valuation Advisory, a commercial real estate appraisal firm having been in business for nearly 30 years, is looking to expand our operations. We are a Tampa based firm with staff positions available for Trainee appraisers in our Westshore office. This is a full time W-2 employment opportunity with benefits.

For trainees, we have developed a training program where candidates will receive extensive training and development opportunities over a 24-month period. Provided performance and training goals are met, successful Associates will be placed within an existing team. This accelerated program provides an opportunity for employees to fast-track their personal knowledge and expertise across the major property types, an opportunity that is truly unique within the industry. Please forward your resume to Chris Shaeffer at [chris@tropicalvaluation.com](mailto:chris@tropicalvaluation.com) or you can call at 813-343-0907 for any additional information about this opportunity.

### **Ft. Myers/Naples – CBRE, Inc.**

**CBRE** is a Fortune 500 (#215) and S&P 500 company, the world's largest commercial real estate services and investment firm. We are seeking candidates to assist in establishing a Valuation Office in SWFL. The ideal candidate would be MAI designated (but Advanced Candidates with desired attributes would be considered); have strong communication skills (both verbal and written); advanced computer skills (Word, Excel, Argus, etc.); superior technical and analytical skills; have established client relationships; and ability to oversee and train appraisers. This position will provide opportunity for motivated individuals to build and grow an office within our platform. Interested individuals seeking more information on this opportunity, please reach out in confidence to [john.fabian@cbre.com](mailto:john.fabian@cbre.com).



## Members on the Move



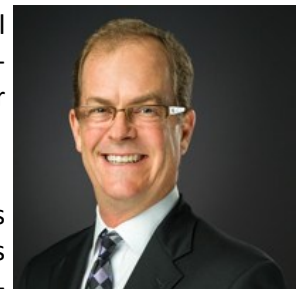
Former Appraisal Institute West Coast Florida Chapter President (2003) **Wayne R. Miller, MAI, AI-GRS, FRICS** has been appointed Chief Appraiser for Bank of America. Wayne is a Certified General Real Estate Appraiser in Florida and has been with the bank for 16 years. He holds a Bachelor of Science in Business Administration from the University of Florida, with a concentration in Real Estate and Urban Analysis.

Wayne is also currently Vice Chair of the Appraisal Standard Board of The Appraisal Foundation. Previously, he served as a member (2008-2015) and Chair (2013-2015) of the Appraiser Qualifications Board of The Appraisal Foundation and served as a Subject Matter Expert in the development of the inaugural National Uniform Licensing and Certification Examinations (2006-2007). Wayne is also a qualified instructor for the Risk Management Association, for the course Understanding and Interpreting Real Estate Appraisals.

Wayne resides in Lutz with his wife Teri and his son's refugee cat ("Kitty").

**Martin C. Engelmann, Jr., MAI, MRICS, SGA** has recently established Tropical Valuation Advisory (TVA) following a 2 1/2 year relationship with Franklin Street. Prior to that, Marty was owner and President of Tropical Realty Appraisal Services for over 25 years.

Marty serves as President of TVA, having 32 years of experience appraising properties throughout the United States and the Cayman and Virgin Islands. He received his Bachelor of Science degree in Real Estate from Florida State University where he maintains a longstanding commitment by serving as a member of the FSU Real Estate Board.



## 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.

## Swango Award Goes to Patricia Staebler, SRA

**Best Article by a Practicing Appraiser in 2017 • Sponsored by the Appraisal Institute Education and Relief Foundation**

### “The 50% FEMA Rule Appraisal”

**Patricia Staebler, SRA**, is the winner of the **2017 Swango Award** for her article, “The 50% FEMA Rule Appraisal,” published in the Fall 2017 issue of *The Appraisal Journal*.



*The Appraisal Journal's* Editorial Board presents the Swango Award to the best article published during the previous year on residential, general, or technology-related topics, or for original research of benefit to real estate analysts and valuers. The article must be written by an appraisal practitioner. Articles are judged based on practicality and usefulness in addressing issues faced by appraisers in their day-to-day practice; logical analysis, perceptive reasoning, and clarity of presentation; and soundness of methodology used, especially in an area of original research.

In “The 50% FEMA Rule Appraisal,” Staebler discusses the unique aspects of appraisals of properties along coastlines and in flood zones, as regulated by the Federal Emergency Management Agency (FEMA). These 50% FEMA Rule appraisals provide building owners an understanding of how much money they are permitted to spend to improve or repair grandfathered structures without triggering compliance issues with the latest FEMA standards. The article outlines the components that should and should not be incorporated in the appraisal, as well as common errors in FEMA appraisals.

Patricia Staebler, SRA, concentrates her practice on the valuation of construction, including insurance replacement valuation, reserve studies, cost segregation analysis, and the 50% FEMA Rule appraisal. Her work in her family's engineering office as a cost estimator, together with experience as an insurance claims adjuster and commercial appraiser, gives her a unique background as an expert in these fields. Staebler authors and teaches state-approved CEU classes in Florida for licensed community association managers and local chapters of the Appraisal Institute. She is the developer and presenter of the Appraisal Institute's webinars, *50% FEMA Appraisal Rule* and *Insurance Replacement Valuation*. She has published articles in *Community*, the official journal of the Community Association Institute, West Florida Chapter; *Working RE*; *The Appraisal Journal*; and *The SunState Post*. Staebler currently serves on the Board of Directors for the Florida Gulf Coast Chapter of the Appraisal Institute and is chair of the chapter's Bylaws Committee.

To read the [award-winning article](http://bit.ly/TAJarticles), go to <http://bit.ly/TAJarticles>

## 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
- Taxbot (Automobile Mileage & Expense Tracking App)

[Learn More](#)

**Club Quarters**— as part of the Club Quarters network, AI professionals are able to take advantage of savings on hotel costs. You, your family, and friends can enjoy their prime locations and unique services at subsidized rates on weekends and holidays. For reservations and more information, visit Club Quarters and enter the Member ID Appraisal for exclusive rates, go to: <http://clubquarters.com/>.

## 2nd Quarter Chapter Meeting in June and Education Offerings



Shawn Wilson, MAI presenting Managing Unusual Appraisal & Litigation Assignments in Ft. Myers



LDAC Update presented by Rachel Zucchi and Jennifer Marshall



Guest Speaker at June meeting, Stan Stouder, CCIM



USPAP class in Ft. Myers in April



Attendees at the 2nd Quarter Meeting



Sandy Adomatis, SRA presenting seminars in Tampa



## 3rd Quarter Meeting of the Florida Gulf Coast Chapter Friday, August 17, 2018, Sarasota, FL

*Please join us for the 3rd quarter chapter meeting!*

### Location

**Marina Jacks—Sarasota, FL**  
2 Marina Drive  
[www.marinajacks.com](http://www.marinajacks.com)



### Schedule of Events

9:30 AM - Board of Directors Meeting  
11:30 AM - 3rd Quarter Membership Lunch Meeting & Program  
1:00 PM - Seminar: Insurance Appraisals: Report Content & Valuation (3 FL CE)

### Fees

**Chapter Meeting + Lunch Only:** \$28 Members \$35 Nonmembers (Price increases August 11)

**Chapter Meeting + Lunch + 3-Hour Seminar:** \$125 Members \$140 Nonmembers (Price increases August 11)

[CLICK TO REGISTER](#)

SIGN UP EARLY FOR DISCOUNT

### Registration Application — Friday, August 17, 2018 —3rd Q Chapter Meeting

Name \_\_\_\_\_

Firm \_\_\_\_\_

CC Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_ License # \_\_\_\_\_

Phone \_\_\_\_\_

***R.S.V.P. Required!***

*email Registration to:*

Florida Gulf Coast Chapter - AI  
Tampa, FL 33618  
T 813-962-4003

Questions? [wcoastfl@tampabay.rr.com](mailto:wcoastfl@tampabay.rr.com)

Register Early and Save....fees increase 8/11/18

[Register Online Here](#)

Payment: **Circle One:** Visa - MC - Amex - Discover - Check

Credit Card: # \_\_\_\_\_

Exp. Date \_\_\_\_\_ CCV: \_\_\_\_\_ Zip \_\_\_\_\_

Name on Card: \_\_\_\_\_



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