

# The Approach



Appraisal  
Institute®

Professionals Providing  
Real Estate Solutions

## 2nd Quarter Chapter Meeting & CE Marina at Edison Ford, Ft. Myers, Florida

**When:** Thursday, May 16, 2019

**Where:** Marina at Edison Ford Banquet Center  
Harbor Room  
2360 W. 1st Street, Ft. Myers, FL



Marina at Edison Ford

### Schedule of Events:

9:30 AM: Board of Directors Meeting

11:30 AM—1:00 PM: Chapter Business Luncheon Meeting, Elections and Program

1:00 PM—4 PM: Trial Components: Recipe for Success or Disaster (3 FL CE)

### Meeting Program:

[REGISTER](#)

Please join us for the 2nd quarter chapter meeting for the election of the 2020 leadership. The slate of nominees can be found in this newsletter. Our guest speaker will be **John Tallmage**, Director of Lee County Economic Development Office. He previously served as the chief of staff to the city Manager of the City of Ft. Myers and spent several years on the Sanibel City Planning Commission. See more on our guest speaker on page 3 of this newsletter.

**Election**—The election of the 2020 chapter officers, directors and regional representatives will also be held at this meeting. See this newsletter for the slate of nominees. We hope to see you at the meeting and support your fellow chapter members — [register today!](#)

### Seminar:

**Trial Components: Recipe for Success or Disaster?** This 3-hour seminar breaks down component parts of the trial and will inform attendees on what different trial participants are trying to accomplish. This seminar was developed by John Underwood, MAI and will be a panel style format with Q & A. See education report for more details on our panel of attorneys. The class has been approved for 3 hours of Florida CE credit. [Sign up today!](#)

We hope to see you at the 2nd Quarter chapter meeting and seminar in Ft. Myers! Stay informed about 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.

### 2019 Officers & Directors

#### President

Julie Battaglia, MAI, AI-GRS

#### Vice President

Rachel Zucchi, MAI

#### Treasurer

Brian Zamorski, MAI

#### Secretary

Patricia Staebler, SRA

#### Directors

Devon Carter, MAI  
Michael Cliggitt, MAI  
John Fabian, MAI  
Jennifer Marshall, SRA, AI-RRS  
Brad Saucier, MAI  
Timothy Sunyog, MAI  
Michael Twitty, MAI  
Byron Torres, MAI  
Wes Sanders, MAI, Ex Officio

### Region X Representatives

Michael Cliggitt, MAI  
Ned Palmer, MAI  
Andrew Skinner, MAI, SRA  
Jennifer Marshall, SRA, AI-RRS  
Michael Jonas, MAI  
James "Matt" Terry, SRA  
Patricia Whittington  
Rachel Zucchi, MAI  
Julie Battaglia, MAI (President)

### Committee Chairs

Bylaws: Patricia Staebler, SRA  
Finance: Brian Zamorski, MAI  
Guidance: Jennifer Marshall, SRA  
Education: Julie Battaglia, MAI  
Govt. Relations: Devon Carter, MAI  
Univ. Relations: Bruce Cumming  
Newsletter: P. Staebler/ Nancy Bacher  
Public Relations: Brian Zamorski

### Chapter Executive Director

Nancy Bacher  
(813) 962-4003  
[info@gulfcoastai.org](mailto:info@gulfcoastai.org)

### Region X Officers

Nick Pilz, MAI, SRA, Chair  
Elaine Liz-Ramirez, Vice Chair  
Lauren Dowling, Region ED



REGISTER  
TODAY!

2019  
Denver

ANNUAL  
CONFERENCE

JULY 22 - JULY 24



## President's Message, Julie Battaglia, MAI, AI-GRS



With the 1<sup>st</sup> Quarter meeting taking place the last week of March, the 2<sup>nd</sup> Quarter Meeting is coming up fast in Ft. Myers on May 16<sup>th</sup>! We will have a Chapter Lunch Meeting at the Marina at Edison Ford in Ft. Myers at 11:30 am. John Talmage, Director of the Lee County Economic Development Council, will be our guest speaker and John Underwood, MAI will be teaching **Trial Components** (3 hours FL CE) in the afternoon. We hope to see you there!

I know I covered an array of topics in the 1<sup>st</sup> Quarter Newsletter, so I'll keep it brief this quarter with general updates and events to look out for later this quarter and into 3<sup>rd</sup> quarter.

First, I'd like to thank everyone that attended **VALUEvent**. We had a really good turn-out for the Chapter Meeting and Round Table event in the afternoon, and several of us took a fancy golf cart shuttle over to Proof Brewery for a 2-hour brewery seminar and tour. We all had a fantastic time learning about the brewery industry, applicable regulatory requirements, brewery real estate trends, and we ended the seminar with a very detailed tour of the facility that was led by the brewery owner who was a treasure trove of knowledge on the subject. We also had a chance to sample the product as well!

I want to direct everyone to take a look at the Government Relations Committee article authored by our Chapter Government Relations Chair, Devon Carter. Devon has provided a detailed overview of the legislative agenda for **VALUEvent** that the Region X Representatives covered during their lobbying efforts in the Capitol on March 26<sup>th</sup>. The article also covers other topics that are important and on the table. There are quite a handful of issues, and we are always looking for more Chapter members to assist with government relations efforts and attend future **VALUEvents**. This is the single most important event we host every year to support the betterment of our profession by talking directly to our legislators in the state of Florida. Please think about joining us for **VALUEvent** in Tallahassee early next year!

If you've visited the Appraisal Institute website lately, you will notice the **2019 Annual Conference** is open for registration. It is being held at the Hyatt Regency Denver at the Colorado Convention Center in the heart of downtown Denver this year, July 22<sup>nd</sup> through 24<sup>th</sup>. The Florida Gulf Coast Chapter will be sending 4 Region Representatives along with myself (as Chapter President) to Denver for the Region X meeting on Sunday, July 21<sup>st</sup>, the day before the Annual Conference begins. There is an LDAC alumni event that evening as well, and the Chapter Leadership Program (CLP) is being held Monday morning before the Conference begins. This will be a jam-packed trip for the Region Reps and anyone who stays for the conference itself.

The Annual Conference will begin Monday afternoon with an inspirational keynote speaker to kick off the event. There will be one breakout session offered, and then an off-site reception at Coors Field to end the evening. Day two is a full day beginning with a women's initiative breakfast open to all women attending, a general session on cannabis and real estate, and three breakout sessions. The evening is capped off with the President's Gala Cocktail Reception and Dinner for all participants to attend and show off their dancing skills. Day three will include two morning breakout sessions, and the conference will come to an end that afternoon after an awards luncheon sponsored by the AI Education and Relief Foundation. The Conference agenda can be found on the Appraisal Institute website if you're interested in a trip to Denver in July!

I also wanted to share with you the names of the three Chapter members that will be attending LDAC on our behalf this year. Byron Torres, MAI (2<sup>nd</sup> year attendee), Mike Twitty, MAI (1<sup>st</sup> year attendee), and Tim Sunyog, MAI (1<sup>st</sup> year attendee) will be lobbying our federal congressmen and women on Capitol Hill in Washington, D.C. on our behalf. I know they will be excellent representatives for our Chapter at one of the most coveted events the Appraisal Institute offers each year. They will also be partaking in some of the most important round table research the Appraisal Institute performs each year during the their group breakout sessions. Their feedback and participation in the conversations is what helps shape the Appraisal Institute's future. If anyone is interested in attending LDAC and becoming more involved in the Chapter, please reach out to myself or Nancy as the Chapter Board of Directors will be considering those interested for next year's one open LDAC sponsorship a little later this year.

Lastly, don't forget to contact us if you're interested in joining a committee or want to find ways to get involved with the Chapter. We want to hear from you! We also want to know what peaks your interest for upcoming educational offerings. And as always, sponsorship packages are available for several events as well for anyone that wants to advertise their services.

I hope everyone is off to a productive start in 2019! We hope you can join us at the 2nd Quarter Meeting in Ft. Myers or one of our other chapter meetings..

## Guest Speaker—May 16, 2019 2nd Q Chapter Meeting — Ft. Myers



### John Talmage, Director, Lee County Economic Development Office

Our May guest speaker has spent more than 30 years working in local economic and community development, both for municipal governments and national research organizations. Currently, John is the Director of Economic Development for Lee County. Previously, he most recently served as the Chief of Staff to the City Manager of the City of Ft. Myers and served for several years on the Sanibel City Planning Commission.

John began his career working for the New York City Council during the Dinkins and Giuliani Administration, focusing on development along the Brooklyn Heights, Williamsburg and Greenpoint waterfronts. He directed Economic Development for the City of New Orleans during the Nagin Administration and served as a Senior Policy Advisor to Mayors Diaz of Miami and Mallory of Cincinnati.

John left local government to serve as the CEO/President of Social Compact. Social Compact is a research organization serving the federal regulatory community, cities around the country, and community development organizations specializing in micro-market and demographic research.

John facilitates a Community Real Estate Development Program for the University of South Florida's Florida Institute of Government throughout Florida and is a Senior Research Fellow in Economic Development at the Florida International University's Metropolitan Institute. John has served on a number of boards, including most recently the Sanibel Community Association, F.I.S.H., CROW and the Sanibel Sea School. John has been recognized for his work in community development by both the United States Congress and the New York State Assembly and has received over 35 awards for his contributions to economic and community development around the country.

## ELECTIONS - 2020 Officers, Directors and Region Representatives

The **2019 Nominating Committee** hereby recommends the following individuals to serve the position of 2020 officers, directors and regional representatives for the **Florida Gulf Coast Chapter**. The election of the following nominees will be held during the 2nd Quarter chapter meeting on **Thursday, May 16** at the Marina at Edison Ford in Ft. Myers, FL. No additional nominations can be made from the floor.

### Florida Gulf Coast Chapter - 2020 Officers

**President:** Rachel Zucchi, MAI

**Vice President:** Brian Zamorski, MAI

**Treasurer:** Patricia Staebler, SRA

**Secretary:** Timothy W. Sunyog, MAI

### 2019 Nominating Committee:

Wesley Sanders, MAI, AI-GRS, Chair

Gerald Hendry, MAI

Sandra Adomatis, SRA

Brent Scott, MAI

### Directors 2018-2020

John Fabian, MAI  
Brad Saucier, MAI  
Julie Battaglia, MAI (Ex-Officio)

### Directors 2019-2021

Michael Cliggitt, MAI  
Byron Torres  
Jennifer Marshall, SRA, AI-RRS  
Devon Carter, MAI

### Directors 2020-2022

James "Matt" Terry, SRA  
Martin Engelmann, MAI

### 2020 Region Representatives:

Ned Palmer (2017-2020)  
Andrew Skinner, MAI, SRA (2017-2020)  
Jennifer Marshall, SRA (2018—2021)  
Michael Cliggitt, MAI (2019-2022)  
Michael Jonas, MAI (2019—2022)  
James (Matt) Terry, SRA (2019—2022)  
Patricia Whittington (2019—2022)  
Brian Zamorski, MAI (2017—2020)  
Rachel Zucchi, MAI — *Chapter President*

**2020 Alternate Region Reps:** Julie Battaglia, MAI, Karen Goforth, Patricia Staebler, John Fabian, Michael Twitty, Steve Griffith, Wesley Sanders, Caroline Sutton, MAI

## 2019 VALUEvent - Tallahassee, Florida

*(a Region X Event)*

The **2019 VALUEvent** held in Tallahassee the last week of March was considered a success. About a dozen or so appraisers from Region X met with the legislators with a few talking points. First was a Statute of Limitations for Appraisals. In a nutshell, appraisers can be civilly liable for appraisals, well beyond the Record Keeping Rule in USPAP, for an unlimited amount of time. The law, as written allows for a limit of four years from discovery of an applicable error; however, the discovery could come at any point in the future. We are pushing for limiting actions to within six years from the date the appraisal service was completed. This would be more in line with USPAP's Record Keeping Rule with fraud or misrepresentation continuing under the current rule.



*2019 VALUEvent*

Second, reducing the number of FREAB members from nine back to seven. Currently, there are two sitting AMC members (more than 20% of the board), one for every 114 regulated entities. Appraisers on the board represent one per 736 licensees. The suggested solution is to reduce the size by attrition, not filling a seat of one AMC member and one "at large" member as they become vacant.

Third, appraisers, may be the only profession in Florida where each professional must purchase a copy of the law that they are required to follow. Essentially, all appraisers are required to buy a copy of USPAP (hard or electronic) every two years. We are proposing that the Division of Real Estate provide a free copy of USPAP upon license renewal. The idea is that the state could get USPAP at a reduced cost. It is not clear who will ultimately be responsible for the cost, but it could be less than the current \$75 for USPAP and \$35 for the Student Manual.

Also, on a state level, legislation is in the works to extend homestead portability from two years to three. At issue is that the public views the portability from the date of sale, when in actuality, it (like most other real estate tax issues in Florida) is from January 1 of the year of sale. Essentially if you sold your house on December 31, you have only one year to buy another homestead. The impact to the counties is minimal but could be extreme for homeowners who are downsizing. The Senate bills are SJR 362 and SB 324 (Brandes); the companion bills in the House are HJR 1389 and HB 1391 (Grant).

On a federal level, FEMA is proposing to transform the way they assign risk to individual properties. From what I understand, new technologies will bring the analysis and risk assessment to the parcel level. Though touted by FEMA as helping customers better understand their flood risk, it could cause flood insurance premium increases to vary widely.

Evaluations continue to be a headache that both the legislature and FREAB are going to have to address, the sooner the better. A seemingly quiet petition to DPBR/FREAB from Accurate Title Group, LLC "requests a determination that evaluations to be performed by its non-appraiser employees and contractors are not appraisal reports under paragraph 475.611(1)(e) and Section 475.612, Florida Statutes, and therefore can be developed by Petitioner's non-appraiser employees and contractors." This determination could potentially result in evaluations performed by an appraiser are appraisals and must comply with USPAP, while non-appraisers do not have to follow USPAP. Someone is going to have to untie the evaluation Gordian Knot and provide for a level playing field at the least.

Although the dates are not set yet, please consider attending next year's VALUEvent. The more of us that get in front of the folks who represent us, the louder the voice. We have neither the membership numbers, nor the resources the Realtors have, but making our presence and concerns known to our legislators is the best way for them to get to know us.

Finally, attending an FREAB meeting is not only a learning experience with up-to 7 hours of free CE, it can be quite interesting. It is a shame when there are only a couple of observing appraisers watching a dozen or so in for disciplinary reasons. The [seemingly] bad eggs far outweigh the good ones at these meetings. For your information, the next FREAB meeting will be held on June 3<sup>rd</sup> in Orlando.

**Submitted by: Devon Carter, MAI, Government Relations Chair, Florida Gulf Coast Chapter**

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

As you know, 2019 is not a state recertification deadline year, so we have less offerings planned. Classes will, however, be added if any timely topics arise. Remember that it is never too early to begin accumulating your CE hours for the next renewal deadline, which will be November 30, 2020. Don't let it sneak up on you.

We held a very successful 2-hour seminar **Craft Brewery Real Estate Valuation** in conjunction with the 1st Quarter Meeting and the 2019 VALUEvent in Tallahassee in late March.

In February, we offered the new 7-hour class **Evaluating Commercial Leases** with Rick Borges in Sarasota followed by **Practical Applications in Appraising Green Commercial Properties** on March 14—15th in Tampa. The newly revised **Business Practice & Ethics** class will be held in both Tallahassee and Tampa this year. The new BPE class is now a 6 hour class and is approved in Florida for 6 hours of CE, instead of 4, so sign up early for these classes. The Tallahassee offering is coming up on May 9 at the Four Points Sheraton and we are excited to have Barry Diskin, Ph.D., MAI as our instructor. The Tampa BPE class will be held in October.



Julie Battaglia, MAI, AI-GRS

We have several very interesting chapter-developed seminars on the schedule, including **The Cost Approach: Unnecessary or Vital to a Growing Practice?**, a 7-hour class developed and Instructed by Craig Steinley, SRA, AI-RRS in Tampa. This seminar was originally scheduled in April, but due to weather related travel difficulties for our instructor, it will be rescheduled to June. It is approved for 7 CE hours in Florida. This will be the last offering of this seminar before it becomes a national seminar. It has received great reviews, so we encourage you to register for this class.

At the **2nd Quarter meeting** on Thursday, May 16th, we will offer the popular 3-Hour seminar moderated by John Underwood titled, **Trial Components: Recipe for Success or Disaster** in Ft. Myers. This will be a panel format with three attorneys from Tampa, Ft. Myers and Naples. **Jeffrey D. Fridkin, Esq**, Naples, specializes in Civil Trial and Business Litigation, **Vera Bergermann, Esq.**, Ft. Myers, specializes in Family Law, and **Jackson H. Bowman IV, Esq**, Tampa, specializes in Eminent Domain. This seminar is approved for 3 hours of Florida CE credit. This should be an excellent offering with invaluable information. (See more detailed information on the panel of attorneys on page 6 of newsletter)

Two other new seminars are scheduled for this summer, **Valuation by Comparison: Residential Analysis and Logic** for the residential appraiser instructed by Sandy Adomatis, SRA and **Appraisal Aerial Inspections Using a Drone** which was developed by Lamar Ellis, MAI will be held in Destin, FL. A summer trip to Destin is never a bad idea! Please review our 2019 education schedule which is included in this newsletter and plan to attend many of these interesting offerings. **Register early and save \$\$.**

Our chapter education goal is to give you the best instruction, material and topics on a timely basis. Sign up for them as early as possible to ensure the minimum attendance needed and 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 lowest in the state and 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 or changes 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). We do plan a website update sometime this year.

**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 with any questions or suggestions.

**To register for classes:** <http://www.appraisalinstitute.org/education/FloridaGulfCoast.aspx>



Craft Brewery seminar presenters

## Trial Components: Recipe for Success or Disaster



The chapter education committee has scheduled a very popular 3-hour presentation, **Trial Components: Recipe for Success or Disaster**, for the 2nd quarter chapter meeting in Ft. Myers on May 16th. This seminar was developed and moderated by **John Underwood, Jr., MAI, SRA**. We would like to congratulate John Underwood, who recently received the prestigious **2018 James H. Pritchett Award**, which recognizes a Designated Member of the Appraisal Institute for outstanding contributions to appraisal education with a focus on litigation and condemnation.

### Meet Our Panel of Attorneys

**Jackson H. Bowman IV, MAI, Esquire** - Jackson is a partner in **Moore, Bowman & Rix, PA**, located in Tampa, FL. For over 30 years, Mr. Bowman's professional career has involved real estate-related matters. He is a graduate of The University of the South (B.A. 1985) and Stetson University College of Law (J.D. 1998). Mr. Bowman brings experience as a real estate appraiser (He holds the MAI designation from the Appraisal Institute) and consultant in the field of eminent domain law. Mr. Bowman served for five years as an adjunct professor at Stetson University College of Law, teaching Real Property Litigation and Land Use Law. He frequently lectures on property rights topics to interested professionals at seminars sponsored by CLE International (2004, 2005, 2008, 2011, and 2015), and ALI-ABA (2009). He is a member of the Florida Bar's Eminent Domain Committee, and is admitted to practice before all Florida state courts; the United States District Court for the Middle District of Florida; and the United States Supreme Court. Mr. Bowman is named in The Best Lawyers in America® for years 2007-2018. In 2014 he was named Lawyer of the Year by Best Lawyers in the field Eminent Domain for the Tampa area. Mr. Bowman has litigated a wide variety of cases across the state to successful conclusion.



**Jeffrey D. Fridkin, Esquire** - Jeff is a founding member of **Grant Fridkin Pearson, P.A.** in Naples, FL and has practiced law in Southwest Florida since 1985. Jeff has for 25 years maintained an AV rating from Martindale-Hubbell. He is a Florida Super Lawyer (2006-2016) and appears in the Bet-the-Company Litigation, Commercial Litigation, Litigation-Construction, Litigation-Real Estate and Litigation-Trusts & Estates sections of The Best Lawyers in America (2006-2017). Jeff has also been named Best Lawyers 2014 Fort Myers Bet-the-Company Litigation "Lawyer of the Year," Best Lawyers Fort Myers Litigation-Construction "Lawyer of the Year" (2014-2016), and 2017 Best Lawyers Fort Myers "Lawyer of the Year" Litigation-Real Estate. Jeff has also been designated as a Legal Elite in commercial litigation by Florida Trend Magazine (2013-2016). On June 12, 2009, Jeff was presented with The Donald E. Van Koughnet Lion of the Law Award for Professionalism by the Judiciary of Collier County, Florida. Jeff, a Florida Bar Board-Certified Civil Trial (since 1995) and Business Litigation (since 1996) Specialist, heads our firm's litigation group. He has, over the years, successfully represented clients in hundreds of substantial disputed matters involving commercial, wills/trusts and personal injury fields of law.



**Vera Bergermann, Esquire** - **Bergermann Law Firm** was founded in 1996 by Vera Bergermann. Ms. Bergermann has been practicing law since 1980 and has over 30 years of legal experience. She currently provides expert legal guidance to Fort Myers, throughout Lee, Collier neighboring counties. She passed the challenge of the Florida Bar on her first attempt in 1994 and opened her practice downtown after becoming a certified family law mediator in 1996. Ms. Bergermann's practice has since expanded to serve Lee, Collier, Charlotte, Hendry, and DeSoto Counties. Ms. Bergermann earned her B.A. in Psychology with high honors and distinction from the University of Michigan in 1976 in the month she turned 19 years old. She then attended law school at Loyola University and earned her J.D. in 1980. She attended graduate school at Widener University, earning a master's degree in taxation in 1988.



[Register for 2nd Q Meeting + Trial Components](#)

## 2019 Education Schedule



| Date                                 | Class   | Instructor                                |
|--------------------------------------|---|---|
| February 21                          | Evaluating Commercial Leases - Sarasota (7 CE)  | Richard Borges, MAI, SRA                  |
| March 14–15                          | Practical Applications In Appraising Green Commercial Properties (7 CE)   | Timothy Runde, MAI                        |
| March 25–26                          | 1st Quarter Chapter Meeting and VALUEvent—Tallahassee<br>Craft Brewery Real Estate Valuation (2 CE)<br>2019 VALUEvent | Panel of Speakers                         |
| April 11<br><b>Postponed to June</b> | The Cost Approach: Unnecessary or Vital to a Growing Practice (7 CE) (Tampa)  | Craig Steinley, SRA, AI-RRS               |
| May 9                                | Business Practice & Ethics (6 CE) - Tallahassee   | Barry Diskin, Ph.D., MAI                  |
| May 16                               | <b>2nd Quarter Chapter Meeting &amp; Elections</b> - Ft. Myers<br>Trial Components: Recipe for Success (3 CE)         | John Underwood, MAI<br>Panel of Attorneys |
| June 12                              | Valuation by Comparison: Residential Analysis and Logic (7 CE) - Tampa  | Sandra K. Adomatis, SRA                   |
| July 25                              | Appraisal Aerial Inspections Using a Drone (7 CE) - Destin  | Lamar Ellis, MAI                          |
| August 22                            | <b>3rd Quarter Chapter Meeting</b> - Tampa<br>Raise Your Appraiser IQ (7 CE)  | Ted Whitmer, MAI                          |
| October 3–4                          | Appraiser as Expert Witness<br>Tampa (15 CE)  | John Underwood, MAI                       |
| October 24                           | Business Practice & Ethics (6 CE) (Tampa)   | Vincent Dowling, MAI                      |
| November 8                           | <b>4th Quarter Chapter Meeting &amp; Installation</b><br>Seminar—TBA (Sarasota)                                       |   |
| Tentative                            | Rural Valuation Basics (Tallahassee)  |   |

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](mailto:info@gulfcoastai.org)





The 2019 **Leadership Development and Advisory Council (LDAC)** will be held in Washington, D.C. on May 15—17, 2019. The Florida Gulf Coast Chapter will be represented this year by:

- **Byron Torres, MAI**
- **Timothy Sunyog, MAI**
- **Michael Twitty, MAI**

LDAC has served as a source of leadership and an inspiration for new programming ideas for the Appraisal Institute for over 30 years. LDAC has helped establish an appraiser presence in Congress and provides a forum where ideas and opinions of topics of concern in the profession can be exchanged. The Leadership Development and Advisory Council has a long history as a training ground for future leaders with the Appraisal Institute. We look forward to hearing from our attendees in the next newsletter.

We thank all of our previous chapter members who represented us in the past. The past chapter attendees at LDAC were:

|       |   |       |  |
|-------|---|-------|--|
| 1985: | Leslie McKeon, MAI; David Ellis, MAI  | 2006: | Karen Goforth, MAI; David Lemonde, SRA;  |
| 1986: | Steve Kapplin   |       | Patricia Rottenberg; Joni Herndon, SRA   |
| 1987: | Peter Parrado, MAI  | 2007: | Tom Crockett; David Lemonde, SRA; Patty Rottenberg   |
| 1988: | John Menard, MAI  | 2008: | David Lemonde, SRA; Jennifer Marshall, SRA; Brad Saucier   |
| 1989: | Warren Weathers, SRA  | 2009: | Brad Saucier; Michael Jonas, MAI   |
| 1990: | Ted Dixon, SRA; David Lane, SRA   | 2010: | Brad Saucier; Michael Jonas, MAI   |
| 1991: | N/A   | 2011: | Michael Jonas, MAI; Ned Palmer, MAI; Mary Patterson, SRA   |
| 1992: | Randall Reid, MAI   | 2012: | Mary Patterson, SRA; Ned Palmer, MAI; Wes Sanders, MAI   |
| 1993: | Randall Reid, MAI; Mike McKinley, SRA   | 2013: | Mary Patterson, SRA; Ned Palmer, MAI; Wes Sanders, MAI & Brian Zamorski, MAI                                   |
| 1994: | Mike McKinley, SRA; Joni Herndon, SRA; Wayne Miller, MAI                        | 2014: | Brian Zamorski, MAI; Julie Battaglia, MAI; Patricia Whittington  |
| 1995: | Wayne Miller, MAI; Joni Herndon, SRA; Ray Carroll, MAI; Colleen Blumenthal      | 2015: | Julie Battaglia, MAI; Patricia Whittington; Patricia Staebler and Andrew Skinner, MAI                          |
| 1996: | Wayne Miller, MAI; Ray Carroll, MAI; Colleen Blumenthal, MAI; Randall Reid, MAI | 2016: | Julie Battaglia, MAI; Patricia Whittington; Patricia Staebler, SRA; Andrew Skinner, MAI and Rachel Zucchi, MAI |
| 1997: | Martin Engelmann, MAI; Kevin Hayes, MAI   | 2017: | Andrew Skinner, MAI; Jennifer Marshall; SRA; Rachel Zucchi MAI; Byron Torres; Patricia Staebler, SRA           |
| 1998: | Martin Engelmann, MAI; Kevin Hayes, MAI   | 2018: | Jennifer Marshall; SRA; Rachel Zucchi, MAI   |
| 1999: | Henry Ellis, MAI; Jon Thomas, SRPA; Ray Carroll, MAI                            |       |  |
| 2000: | Henry Ellis, MAI; Jon Thomas, SRPA;   |       |  |
| 2001: | Julian Stokes; David Taulbee; Bruce Cumming                                     |       |  |
| 2002: | Jon Thomas; Bruce Cumming; Eileen Poulos  |       |  |
| 2003: | Bruce Cumming; Cindy Goding, MAI  |       |  |
| 2004: | Tom Crockett, MAI; Bruce Cumming; Eileen Poulos                                 |       |  |
| 2005: | Eileen Poulos, Karen Goforth, MAI   |       |  |

## FREAB Meetings

### 2019 General Meetings

- Monday, June 3, 2019
- Monday, August 5, 2019
- Monday, October 7, 2019
- Monday, December 9, 2019

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.

### 2019 Committee Chairs

Candidate Guidance: Jennifer Marshall, SRA, AI-RRS  
 Bylaws: Patricia Staebler, SRA  
 Education: Julie Battaglia, MAI, AI-GRS  
 Finance: Brian Zamorski, MAI  
 Government Relations: Devon Carter, MAI

Nominating: Wesley Sanders, MAI, AI-GRS  
 Programs: Rachel Zucchi, MAI  
 Public Relations: Brian Zamorski, MAI  
 University Relations: Bruce Cumming  
 Newsletter: Patricia Staebler | Nancy Bachor

### 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](#).



**Pursue an  
Appraisal Institute  
Designation**



*Florida Gulf Coast Chapter, Appraisal Institute*

P. O. Box 273994, Tampa, FL 33618 T: 813-962-4003 Website: [www.gulfcoastai.org](http://www.gulfcoastai.org)

## Jobs Board

**BBG's Florida** expansion continues with staffing opportunities in Tampa, Miami, Orlando and Jacksonville offices. We are actively seeking:

MAI Designated Appraisers  
Senior and Junior Level Appraisers  
Research Analyst

BBG is a national, full-service provider of commercial property valuation products ranging from specialized due diligence and consulting services to traditional appraisals. Our management team has over 100 years of combined leadership experience in the commercial valuation industry and has established and maintained professional relationships throughout a broad spectrum of clients including banks, agency lenders, equity investors, real estate fund advisors, REITs and insurance companies. BBG's national presence includes 40+ offices from coast to coast including five (5) in Florida.

BBG offers a complete and dynamic technology package and corporate support staff maximizing the efficiency of the assignment process from engagement to transmittal. All industry standard resources are provided. BBG provides a fully integrated laptop to every employee providing flexibility for work in the office, the field or home offices.

Compensation packages are based on level of experience and background. Competitive fee splits are offered to appraisers. BBG offers attractive employee benefit packages including medical, dental, vision, long-term disability and life insurance. In addition, BBG pays Appraisal Institute dues, applicable state licensing fees and provides a generous annual education allowance.

Career advancement potential is high and expected. Please forward resumes and inquiries to Eric Hoening, MAI – Managing Director at [ehoening@bbgres.com](mailto:ehoening@bbgres.com) or call 813-327-4101.



*Thank you to our 2nd quarter chapter meeting sponsor:*

*1st Appraisal Solutions, Vero Beach, FL*



### 2019 Florida Gulf Coast Chapter Meetings

*Save the dates!!*

2nd Quarter Meeting & Elections - May 16 - Ft. Myers  
3rd Quarter Meeting - August 22 - Tampa  
4th Quarter Meeting & Installation - November 8 - Sarasota

## Candidate Guidance

**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.

**2019 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. Offering scheduled in Philadelphia still has openings. 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).**

We currently have **38** candidates for designation 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.

## 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. 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.

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FOR A COMPLETE LIST OF EDUCATION OFFERINGS BY THE FLORIDA GULF COAST CHAPTER, VISIT OUR WEBSITE AT: <http://www.gulfcoastai.org>



## Appraisal Institute Education and Relief Foundation

### AI EDUCATION AND RELIEF FOUNDATION SCHOLARSHIPS

Scholarships are eligible to worthy Candidates for Designation. Deadline to apply is [July 1st](#). For more information on the scholarship options, go to; [www.aiedtrust.org](http://www.aiedtrust.org).

## News from the Appraisal Institute

**Coming soon.....** The Appraisal Institute will launch a new association management system, or AMS, later this fall. More information will be coming on this soon.

### 2019 Annual Conference Opens Registration

The 2019 Annual Conference will be held on July 22—24, 2019 in Denver, CO **at the Hyatt Regency Denver, located in the heart of downtown Denver.** The event, whose theme is “Climbing Even Higher,” will feature hundreds of real estate professionals from across the U.S. and around the world, dozens of experienced presenters, 30 educational sessions (offering state and Appraisal Institute continuing education credit), exhibits of cutting-edge valuation products and services, the President’s Gala reception and dinner, an awards luncheon, networking with colleagues and opportunities to explore Denver.

This year’s keynote speaker will be Allison Massari—an entrepreneur, celebrated artist and executive coach named on the “Best Keynote Speakers List” by Meetings & Conventions magazine. As a survivor of two life-threatening car accidents, severe burns and a traumatic head injury, she exposes her personal journey from absolute loss, to forgiveness and understanding, and finally to success and a life beyond anything she could have imagined. Her message is focused on showing her audience how to find peace, purpose and happiness and giving them the tools they need to rise above any obstacle.

Learn more about the [Appraisal Institute Annual Conference](#).



***Interested in sponsoring a chapter meeting or 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.*

**Event Sponsorships Available....[Click Here](#) to Become a Meeting Sponsor Today!**

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## 2019 Leadership - Florida Gulf Coast Chapter

The following individuals were elected to serve the position of 2019 officers, directors and regional representatives for the **Florida Gulf Coast Chapter** and were installed at the **November 9th** chapter meeting in St. Petersburg. Their term began January 1, 2019. We want to thank them all for volunteering their time to serve the chapter, the region and the Appraisal Institute in these important positions!

### *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

#### **Directors (2017-2019)**

Timothy Sunyog, MAI

Michael Twitty, MAI

Wes Sanders, MAI, Ex-Officio

#### **Directors (2018-2020)**

John Fabian, MAI

Brad Saucier, MAI

#### **Directors (2019-2021)**

Devon Carter, MAI

Byron Torres, MAI

Michael Cliggitt, MAI

Jennifer Marshall, MAI

#### **Region Representatives (2017-2020)**

Ned Palmer, MAI

Andrew Skinner, MAI

Rachel Zucchi, MAI

#### **Region Representatives (2018-2021)**

Jennifer Marshall, SRA, AI-RRS

#### **Region Representatives (2019-2022)**

Michael Cliggitt, MAI

Michael Jonas, MAI, AI-GRS

James "Matt" Terry, SRA

Patricia Whittington

#### **Alternate Region Reps - 2019**

Don Saba, SRA

Michael Twitty, MAI

Brian Zamorski, MAI

Wesley Sanders, MAI

Dan Richardson, MAI

Karen Goforth, MAI

John Fabian, MAI

Patricia Staebler, SRA

Woody Herr, MAI

### **2019 Comp Exam Dates**

Submit your applications for 2019 exams by deadline dates below :

August 1—August 31, 2019: Application Deadline—June 20, 2019

November 1—November 30, 2019: Application Deadline—September 20, 2019

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

### **[Click Here for Comp Exam Information](#)**

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

### **New Appraisal Institute Book Addresses Corridor Valuation**

"In response to a pressing need among valuation professionals for guidance in appraising railroad corridors, the Appraisal Institute, the Appraisal Institute of Canada and the International Right of Way Association have joined together to develop this long-awaited text," 2018 Appraisal Institute President James L. Murrett, MAI, SRA; 2018 Appraisal Institute of Canada President Peter McLean, AACI, P. App; and 2018/2019 International Right of Way Association President Jeffrey L. Jones, SR/WA wrote in the book's foreword. "Practitioners with an interest in corridor valuation and experience in this challenging area of appraisal practice should find the topics explored and the insights provided in this text to be illuminating."

"Corridor Valuation: An Overview and New Alternatives," explores the controversial issues surrounding railroad corridors, with definitive information on the evolution of corridor valuation theory, related property rights and legal issues, and methodologies for valuing railroad, telecommunications, pipeline, power transmission and conservation corridors.

"Corridor Valuation: An Overview and New Alternatives," (ISBN: 9781935328759) is a 240-page soft cover book. It is available for \$50 for the print or PDF version, or \$70 for both. Call 888-756-4624 or [order online](#).

## Membership Updates – Florida Gulf Coast Chapter

### Candidates for Designation:

Josette D. Jackson, Pace, FL

### Status Change:

Kirsten Hoffman Philip (candidate to practicing affiliate)

Andrew D. Anderson (candidate to practicing affiliate)

### New Practicing Affiliate

Wynta Loughrey, Sarasota

### New Affiliate:

Lauren Beavers, Englewood

### Member Retired:

Michael D. Hartnett, MAI, Bartow

### Members Resigned

Jerry Cox, Shalimar

### Transferred Out

Robert M. Klein, MAI, A-GRS (to Philadelphia)

## Members on the Move

**Sandra Adomatis, SRA**, of Adomatis Appraisal Service was the keynote speaker at the recent [2019 RESNET® Building Performance Conference](#) in February in New Orleans.

Sandra's address, "Let Us Go Forward Together – The Emerging Nexus Between the HERS® and Real Estate Industries", explored how HERS Raters and real estate professionals can work together. She also illustrated the key steps of the real estate transaction process impacted by the [HERS Index Score](#). Click the video above to view her keynote address.

All residential AI professionals have FREE access to the [Appraiser Online Portal to RESNET HERS Registry](#). The homes in the portal have been rated for energy efficiency, by certified RESNET Home Energy Raters, as part of [RESNET's Home Energy Rating System \(HERS\)](#). Research has found an [average 9.5% premium for high-performance homes sold](#) and that homes with HERS Index Scores between 40 and 89 commanded a price of between \$85.89 and \$162.52 per square foot.

If you have not logged into the portal or missed the previous invitation to join, below are the steps for your free access:

1. Click on <https://portal.resnet.us>
2. Click "forgot password"
3. Enter your email address and a new temporary password will be emailed to you



By accessing the portal, appraisers can now begin to better understand and value the energy efficiency of HERS Rated homes in their market, including:

- HERS Index Score
- Estimated annual energy costs
- Energy cost savings

Residential Energy Services Network (RESNET) and the Appraisal Institute (AI) are pleased to work together to allow AI professionals focused on residential valuation access to important information about the energy efficiency of more than 2 million homes.

For more information, please visit <http://www.resnet.us/appraisers/>

**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.

## 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
- Valcre
- Travel
- AI Services
- Networking & Leadership Development
- Taxbot (Automobile Mileage & Expense Tracking App)
- STDB
- Framing Success

[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/>.

**Valcre**—The Appraisal Institute is excited to introduce **Valcre** as a new AI benefit. This innovative and intuitive appraisal technology platform is now available to all Appraisal Institute Professionals at a special AI discount of 10 to 20% off a monthly subscription based on subscription plan package. Learn more at [sales@valcre.com](mailto:sales@valcre.com).

**STDB**—Site to do Business is now live. STDB is poised to move towards the future by continuing to provide analysis tools for commercial real estate users and searching for new and innovative products to add to their tool kit.

**Framing Success**— NEW AI benefit. Framing Success is offering an additional 20% off their already discounted AI Member Price to frame your AI Designation Certificate. Order online by April 30th with coupon code APP19 to receive the additional discount on your custom designed AI frame purchase. [Click Here](#)



**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 AI CE cycle for service to the Appraisal Institute. Please notify the Admissions Department of your interest at [admissions@appraisalinstitute.org](mailto: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](mailto:admissions@appraisalinstitute.org) or [click here](#).

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

## 2019 VALUEvent - Tallahassee, FL



*Pre-VALUEvent activities at Proof Brewery in Tallahassee*



*Roundtable Discussions held in Tallahassee*



*Craft Brewery Real Estate Valuation presentation in March*



*Region X Vice Chair Elaine Liz-Ramirez with Region X Reps*



*Tour of Proof Brewery*



*Valuevent meeting prior to departing to the state capital*



*Region X Attendees at VALUEvent*

## 2nd Quarter Meeting of the Florida Gulf Coast Chapter May 16, 2018 - Ft. Myers, Florida

*Please join us for the 2nd quarter chapter meeting & CE!*

### Location

Marina at Edison Ford Banquet Center—Harbor Room  
2360 W. 1st Street, Ft. Myers, FL

### Schedule of Events

May 16, 2019

9:30 AM - Board of Directors Meeting

11:30 AM— 2nd Quarter Chapter Meeting & Election of 2020 Chapter Leadership

1:00 PM—4 PM: Trial Components: Recipe for Success or Disaster (3 FL CE)

### Fees

Chapter Meeting & Lunch Only: \$35\* | \$38

Chapter Meeting, Lunch & Trial Components: \$135\* | \$140

(Fees increase after May 1st) (\* Member Price)

**CLICK TO REGISTER**  
**SIGN UP EARLY FOR DISCOUNT**

### Registration Application — 2nd Q Chapter Meeting & Seminar

Name \_\_\_\_\_

Firm \_\_\_\_\_

CC Billing Address & Zip Code \_\_\_\_\_

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

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

Phone \_\_\_\_\_

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

*Mail or Fax Registration to:*

**Florida Gulf Coast Chapter - AI**  
Tampa, FL 33618

T 813-962-4003

*Questions?*

*wcoastfl@tampabay.rr.com*

Register Early and Save....[Register Online Here](#)

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

Credit Card: # \_\_\_\_\_ Exp. Date \_\_\_\_\_ **CCV:** \_\_\_\_\_

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

Register Today at: [www.appraisalinstitute.org/education/FloridaGulfCoast.aspx](http://www.appraisalinstitute.org/education/FloridaGulfCoast.aspx)



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