

# The Approach



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## 4th Quarter Chapter Meeting & Seminar Courtyard Marriott Riverfront, Bradenton, Florida

**When:** Friday, November 8, 2019

**Where:** Courtyard Marriott Riverfront  
100 Riverfront Drive  
Bradenton, FL 34205

*Note—(Sleeping rooms available for \$149/night until 10-18-19, mention "Appraisal Institute" group rate)*



*Courtyard Marriott Riverfront*

### Schedule of Events

10:30 AM—1:30 PM: Board of Directors Meeting  
2 PM—5 PM: Artificial Intelligence, AMVs & Blockchain Seminar  
5:15 PM—8:00 PM: Social, Dinner Meeting, Program & Installation Ceremony

### Cost

Seminar + Dinner: \$205/Members  
Dinner Meeting Only: \$38 /Members

**REGISTER**

### Chapter Meeting Program

Please join us for the 4th quarter chapter meeting in Bradenton. Our guest speakers will be national incoming president-elect, **Rodman Schley, MAI, SRA** who will install the 2020 chapter leadership. We will also have **Jon Mast**, CEO of the Manatee and Sarasota Counties Builders Industry Association speak on development in Manatee-Sarasota areas.

The instructor for the afternoon seminar, "Artificial Intelligence, AVMs & Blockchain", will be Brian Flynn, MAI, from Plantation, Florida.

See the education report for more details on this new Appraisal Institute seminar in addition to the 2020 schedule. The November class has been approved for 3 hours of Florida CE credit in addition to Appraisal Institute continuing education credit. [Sign up today!](#)

We hope to see you at the final chapter meeting and seminar of the year! 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.

**Hotel Group Rate of  
\$149/night only available until  
October 18, 2019!!  
Call Today for Reservation**

Come Meet National President Elect,  
Rodman Schley, MAI at the 4th Quarter  
Chapter Meeting for the latest national up-  
dates.



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With Online Education from the Appraisal Institute



Appraisal Institute®



SEARCH

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

### Region X Officers

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



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



Dear Chapter Members,

I want to thank you for the opportunity to serve as the Florida Gulf Coast Chapter President this year. I cannot believe how quickly the time has gone by! Our 4th Quarter Chapter Dinner Meeting is in Bradenton this year, which will include the installation of the new 2020 Officers, Board of Directors, Region Representatives, and Alternate Region Representatives. We will be hosting a new seminar before the dinner meeting: Artificial Intelligence, AVMs & Blockchain (2:00 pm to 5:00 pm). **Please remember to sign up for this fantastic new seminar and stay for the dinner and drinks afterwards!**

I am very excited to announce that incoming **Appraisal Institute President Elect, Rodman Schley, MAI, SRA**, will be presiding over the installation of the 2020 slate for us this year! We would like to invite everyone to join us at the Court-yard by Marriott Riverfront hotel in Bradenton on November 8<sup>th</sup>. This is a great opportunity to support our Chapter Leadership, meet Mr. Schley, and learn more about new initiatives the Appraisal Institute has implemented over the last year. **Please make the trip to support our Chapter Leaders and meet our incoming AI President Elect!**

I first met Rodman at LDAC (Leadership Development and Advisory Council) in Washington, D.C. in May 2014. He has always shown such great strength in his leadership abilities throughout the time that I've known him. He is a breath of fresh air, full of innovative ideas, and truly has our members' best interests at heart. I sincerely hope you take this rare opportunity to meet such a worthy leader of our national organization.

We will have the very knowledgeable, **Jon Mast, CEO of the Bradenton – Sarasota Building Industry Association**, as our guest speaker for the Chapter Meeting. Jon will address recent trends and development in the Manatee – Sarasota county areas, and we expect him to discuss the best way for appraisers to work with builders. You won't want to miss it!

Shifting gears a bit, I wanted to mention and make sure our Chapter Members have kept up with the changes filtering down from the national level this year. The new website (**NetForum AMS**) was officially implemented on October 1<sup>st</sup>. I hope everyone is getting to know the new system, which begins with simply updating your password for access (hint: begin by using the 'forgot password' link). We realize we've had a couple issues with education enrollment in the first few days, so please reach out to Nancy for direction if you experience any major concerns. We realize the transition may have a few challenges, and it's possible we'll find out directly from our members when any hiccups occur. Please make sure to let us know if you come across any major items that need to be addressed. Overall, we are still anticipating a smooth transition, and we will work through any identified problems as quickly as possible. I know our incoming Chapter President, Rachel Zucchi, MAI, along with our very knowledgeable Executive Director, Nancy Bacher, are more than capable of leading and navigating the road ahead for our Chapter Members as we learn the new system.

As a reminder, we will officially transfer over to the Chapter Financial Management Administrative Policy (CFMAP) at the end of this year as well (expected in November). This should be a smooth transition since the majority of chapters are already working inside the system, and items of concern have already been addressed.

As my year as President of the Florida Gulf Coast Chapter comes to a close, I would like to thank all of our members that have volunteered their time this year. Your help and participation is what makes our Chapter continue to be a success! I truly appreciate all the time and effort everyone has put into Committee work, Board meetings, Region meetings, Special Projects, and giving feedback in order to make sound business decisions this year. **I also want to thank our Executive Director, Nancy Bacher, for all that she's done and continues to do for our Chapter. We couldn't do it without you Nancy!**

As a reminder, the next VALUEvent in Tallahassee will be held in conjunction with the First Quarter Chapter Meeting and educational offering in 2020. The Chapter Meeting and VALUEvent will be held on February 10<sup>th</sup> and 11<sup>th</sup>, 2020, respectively. Please remember, the more Members we have attend the legislative lobbying event in Tallahassee, the better chance we have of maintaining a voice and achieving the results we desire from the State of Florida. We need 'all hands on deck' to participate in VALUEvent this year. Please contact Jennifer Marshall, SRA, AI-RRS or Devon Carter, MAI if you have questions about the initiatives underway. **Please Save the Date and join us in Tallahassee in 2020!** More details will follow soon. We hope to see you there!

Lastly, don't forget to **contact us if you're interested in joining a committee or want to find ways to be more involved with the Chapter. We want to hear from you!**

It has been a pleasure to serve as Chapter President for 2019, and I thank you for your trust in me!

## Guest Speakers— 4th Quarter Chapter Meeting



Rodman Schley, MAI, SRA,  
National Vice President

**Rodman Schley, MAI, SRA**, of Arvada, Colorado, is the 2019 vice president of the Appraisal Institute. Schley's one-year term as vice president will be followed by one year each as president-elect in 2020, president in 2021 and as immediate past president in 2022. He also will serve on the Appraisal Institute's Executive Committee and on its policy-setting Board of Directors.

Schley wrote the book "Finding Your Fortune in Repossessed Real Estate," and is the creator and host of a national PBS/Create TV television show entitled "Urban Conversion," which educates viewers about maintaining environmentally friendly, sustainable lifestyles in urban settings.

Schley has served nationally on the Appraisal Institute Board of Directors as Region II vice chair, and as a member of the Strategic Planning Committee and the Governance Structure Project Team. He previously served on the National Nominating Committee. He attended AI's annual Leadership Development and Advisory Council conference as a participant (2013-15), and was selected as a discussion leader (2016), vice chair (2017) and chair (2018). He also has served in chapter roles, including as president of the Colorado Chapter. In 2002, he founded Denver-based Commercial Valuation Consultants, Inc., which was acquired by national appraisal firm BBG in 2016.

He received the Appraisal Institute Education Trust's Y.T. and Louise Lee Lum Award, which is given in recognition for the distinguished contribution to the furtherance of the high ideals of the profession of real estate appraising and practices. We hope you will plan to attend to meet one of our national leaders.



**Jon Mast** is the Chief Executive Office for the Manatee-Sarasota Building Industry Association will speak at our 4th Quarter Meeting.

The Manatee-Sarasota Building Industry Association (Manatee-Sarasota BIA) was chartered in 1983. It is a professional trade organization comprised of local builders and associated businesses involved in the homebuilding industry. The association is affiliated with both the (FHBA) Florida Home Builders Association and the (NAHB) National Association of Home Builders. The BIA is an advocate for the housing industry.

The Manatee-Sarasota Building Industry Association was originally chartered in August of 1962 by NAHB. The association operated for many years as a single entity covering Manatee, Sarasota, Hardee and DeSoto counties. In 1983 the organization split its operations and was re-chartered as two separate associations, one in Manatee, and one in Sarasota County. Manatee's charter included Hardee, and Sarasota's charter included DeSoto. DeSoto was later acquired by Charlotte County BIA in 2004. In 2009 Manatee and Sarasota again joined forces as a single entity as the HBA Manatee-Sarasota. The association has a long history of building industry advocacy and community involvement. In October of 2013 the HBA Manatee-Sarasota changed its name to Manatee-Sarasota Building Industry Association to better represent the makeup of our membership. The BIA continues to support our industry concerns and housing issues for the good of the industry and the citizens of the community.

## 2020 Officers, Directors and Region Representatives

The following individuals were elected to serve the position of 2020 officers, directors and regional representatives for the **Florida Gulf Coast Chapter** and will be installed at the November 8th chapter meeting. Their term begins on January 1, 2020.

### **Florida Gulf Coast Chapter - 2020 Officers**

**President:** Rachel Zucchi, MAI  
**Vice President:** Brian Zamorski, MAI  
**Treasurer:** Patricia Staebler, SRA  
**Secretary:** Timothy W. Sunyog, MAI

#### **Directors 2018-2020**

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

#### **Directors 2020-2022**

James "Matt" Terry, SRA  
 Martin Engelmann, MAI

#### **Directors 2019-2021**

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

### **2020 Region Representatives:**

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

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

## **Government Relations Report,** by Devon Carter, MAI

Back in August, the FDIC approved a final rule raising the appraisal threshold from \$250,000 up to \$400,000 where it had been since 1994. Of course, AI is opposed to this move. The higher threshold will likely cause evaluations to become more prevalent. Since evaluation requirements are far more lax than appraisal standards and can be performed by "persons who are competent and have the relevant experience and knowledge of the market, location, and type of real property being valued" this will impact certified appraisers.

How does this apply to us in Florida? As mentioned in a previous newsletter, it was indicated by the attorney for FREAB that evaluations are outside the jurisdiction of the board. Further, there are no standards in place for evaluations on the State level; although FREAB could create them. Some of the board members understand the double standard being applied; however, some are adamantly opposed to allowing appraisers to perform evaluations outside of USPAP.

Back in Washington, Representative Maxine Waters and Senator Sherrod Brown sent a letter to the ASC in regard to the decision to grant a waiver of appraiser certification and licensing to North Dakota. The letter outlines the concerns noting "... appraisals are essential to safety and soundness and consumer protection." The letter further asks that the ASC clarify a number of issues in regard to the decision to grant the waiver including: what sort of data was considered, conflict resolution on a waiver request, the sources of data used when making a decision and who will have the oversight of the appraisal by a non-certified or licensed appraiser.

Save the date for the 2020 Value Event. This is the time when we go to Tallahassee to meet with our elected officials to discuss matters of importance in our industry. The preliminary dates are February 10<sup>th</sup> and 11<sup>th</sup>.





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

Make your plans early to get all the hours you still need for the next recertification deadline, which will be November 30, 2020. The new **2020 Education Schedule** is attached and as you will see, we have plenty of offerings planned to help you meet your CE requirement.



Julie Battaglia, MAI, AI-GRS

The newly revised **Business Practice & Ethics** class will be held in Tampa this month and also in Tallahassee next year. The new BPE class is now a 6 -hour class and is now approved in Florida for 6 hours of CE, instead of 4. Several chapter-developed seminars were given this year, including **The Cost Approach: Unnecessary or Vital to a Growing Practice?**, followed by **Trial Components; Recipe for Success** held in Ft. Myers with John Underwood and a panel of attorneys.

We presented a very well received seminar at the 3rd Quarter Meeting titled **Raise Your Appraiser IQ** with Ted Whitmer, MAI. This seminar was designed for both residential and commercial appraisers to provide better tools of analysis and communication of the analysis to comply with USPAP, client and industry standards and was very well attended. Another seminar held this year was **Appraisal Aerial Inspections Using a Drone** developed by Lamar Ellis, MAI.



The most recent offering in October was the two-day **Appraiser as Expert Witness**, with John Underwood, MAI. Our final class this year will be a new national 3-hour seminar "**Artificial Intelligence, AVMs & Blockchain**" on **November 8th** at the 4th quarter chapter meeting in Bradenton. Sign up soon for early registration fee.

Next year's schedule has several offerings of the required Florida Law and 7-Hour USPAP classes in a variety of locations. Register for one near you as soon as possible. The rest of the offerings are a variety of new and revised Appraisal Institute offerings

in addition to several third-party classes on a variety of commercial and residential topics of interest. [Get your CE hours scheduled early.](#)

Our chapter's education goal is to always give you the best instruction and topics on a timely basis. Sign up for them as early as possible to ensure the minimum attendance needed and take advantage of the early registration discounts. In this time of expanding on-line education, many of you have told us you still desire the classroom setting. Your chapter exists primarily because of classroom education. We receive very minimal funding from National for the on-line programs, so our classroom education program helps keep our chapter dues one of the lowest in the state and the country. You can help keep our chapter financially stable by supporting our programs. Get what you need locally.

**IMPORTANT!!** Please be aware that the Appraisal Institute has implemented a new management system as of October 1, 2019. All AI professionals, students and customers will be required to create a new user ID and password to access your accounts to register for all education programs, chapter meetings or to purchase publications. **The chapter CAN NO LONGER register you for any classes or meetings.** When registering for any classes, the default pricing will be for downloaded materials. If you prefer to order the hard copy materials, you will be prompted to do so as you checkout. Please note, however, there will be an additional materials fee and shipping added to your total. If you order printed materials, they will be shipped directly to you 30 days prior to class so be sure to allow enough time to receive your materials. If you need to cancel a class, that will now be handled directly through the national office instead of the local chapter.

**Note: Registering for chapter offerings has changed. For all Appraisal Institute courses and seminars, you will continue to go to the national website, log in and search for the education offering. However, for chapter-developed classes (like Florida Law), you MUST go to the chapter website for the URL link to register for any of these classes. Chapter-developed classes WILL NOT be posted to the national website. Please feel free to contact the chapter office if you have any questions.**

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).

**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 go to:** [www.appraisalinstitute.org](http://www.appraisalinstitute.org).

## 2020 Education Schedule

### Florida Gulf Coast Chapter



Date	Class	Instructor
February 5–6	3-Hour Florida Law (Winter Haven) 7-Hour USPAP Update	Robert Sutte, MAI Robert Sutte, MAI
February 10	<b>1st Quarter Chapter Meeting and VALUEvent–Tallahassee</b> Ignorance Isn't Bliss: Understanding an Investigation by State Regulatory Board (4 CE)	Clayton Ketcham, MAI
February 11	<b>2020 VALUEvent – Lobby at the Capitol</b>	
February 26	3-Hour Florida Law (Destin)	Clayton Ketcham, MAI
February 27	7-Hour USPAP Update	Clayton Ketcham, MAI
March 5	Client Requested Evaluations: Appraisal Assignments (4 CE) Developing a Supportable Workfile (3 CE) (Ft. Myers)	Vince Dowling, MAI Vince Dowling, MAI
March 25	3 Hour Florida Law (Tampa)	Robert Sutte, MAI
March 26	7-Hour USPAP Update	Robert Sutte, MAI
April 7–8	Fundamentals of Separating Real Property (14 CE) (Tampa)	TBA
April 24	A Dive into Houses with Labels & Style (7 CE) (Tallahassee)	Sandra K. Adomatis, SRA
May 6	7-Hour USPAP Update (Sarasota)	Brian Flynn, MAI
May 14	<b>2nd Q Chapter Meeting - Sarasota</b> 3-Hour Florida Law 2020	Nicholas Pilz, MAI
May 21	<b>How Tenants Create or Destroy Value: Leasehold Valuation and Its Impact on Value (7 CE)</b>	Brian Flynn, MAI
June 2	3-Hour Florida Law 2020 (Tallahassee)	Clay Ketcham, MAI
June 3	7-Hour USPAP Update	Clay Ketcham, MAI
June 12	A Dive into Houses with Labels & Style (7 CE) (Sarasota)	Sandra Adomatis, SRA
June 18	Evaluations and Validations for Appraisers—A Scope of Work Issue (7 CE) (Tampa)	George Mann, MAI
July 23	3-Hour Florida Law 2020 (St. Petersburg)	Nicholas Pilz, MAI
July 24	7-Hour USPAP Update	Brian Flynn, MAI
August 20	<b>3rd Quarter Chapter Meeting - Ft. Myers</b> 3-Hour Florida Law 2020	Nicholas Pilz, MAI
August 21	7-Hour USPAP Update	Tim Andersen, MAI
September 17	Measuring Market Reaction to Residential Home Features (3 CE) Highest & Best Use Puzzles (3 CE) (Tampa)	Sandra Adomatis, SRA
October 8	Business Practice & Ethics (6 CE) (Tampa)	Brian Flynn, MAI
October 22	Client Requested Evaluations: Appraisal Assignments (4 CE) Developing a Supportable Workfile (3 CE) (Tallahassee)	Vince Dowling, MAI Vince Dowling, MAI
November 12 or 13	<b>4th Q Chapter Meeting &amp; Installation - Tampa</b> CE Seminar—TBA	

To register for any of the above national classes, you must log into your Appraisal Institute account and proceed to the Education Search for classes. For a non-Appraisal Institute offerings, please go to the chapter website for the URL links.



## Appraisal Institute Education and Relief Foundation

### ***We are here to help!***

The Appraisal Institute Education and Relief Foundation (AIERF) is here to help Appraisal Institute professionals and their families who are dealing with the aftermath of Hurricanes Florence and Michael.

### **Emergency Financial Assistance**

If you or someone you know are in need of emergency financial assistance, please complete the application below or contact the Appraisal Institute Education and Relief Foundation at [aierf@appraisalinstitute.org](mailto:aierf@appraisalinstitute.org) for more information:

**[Download the Appraisal Institute Education and Relief Foundation Application for Assistance](#)**

### **Your Donations Matter**

Please consider making a donation to the AI Education and Relief Foundation. It is your donations that help fund emergency financial assistance for your colleagues in need, as well as continue to provide scholarships to assist your fellow appraisers in completing their designation education.

**[DONATE TODAY - Contribute to the AI Relief Foundation](#)**

### **Who We Are**

The Appraisal Institute Education and Relief Foundation (AIERF) was born out of the 2018 union of the AI Education Trust and AI Relief Foundation in order to most effectively and efficiently serve real estate appraisal professionals now and into the future.

For more than 50 years, the Appraisal Institute Education Trust (AIET) fostered the advancement of the real estate appraisal profession and played a critical role in supporting valuation education. AIET supported a vast range of initiatives, from world-renowned resources such as the Y.T. and Louise Lee Lum Library, to programs that will help secure the future of the valuation industry, including research grants and scholarships. Since the formation of the Appraisal Institute Relief Foundation (AIRF) following the 2005 Gulf Coast hurricanes, more than \$300,000 in emergency financial assistance has been provided to appraisers and other individuals in need.

## **2019/2020 Florida Gulf Coast Chapter Meetings**



**4th Quarter Meeting & Installation - November 8 - Bradenton**  
**1st Quarter Meeting - February 10 - Tallahassee**  
**2nd Quarter Meeting - May 14 - Sarasota**  
**3rd Quarter Meeting - August 20 - Ft. Myers**  
**4th Quarter Meeting + Installation - November 13 - Tampa**

## FREAB Meetings

### 2019–2020 General Meetings

- Monday, December 9, 2019
- Monday, February 10, 2020
- Monday, March 30, 2020
- Monday, June 1, 2020
- Monday, August 3, 2020
- Monday, October 5, 2020
- Monday, December 7, 2020

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

If you are interested in serving on a chapter committee in 2020, Please contact the chapter office.

### 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**





## 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**

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.

**The USDA Forest Service** has an open appraiser position in Tallahassee, FL. For more information on this opportunity, [click here](#). This position is part of the Southern Regional Office in the Lands, Minerals and Uses Unit with multiple duty location options throughout the Region (including Tallahassee, Florida).

Incumbent is responsible for providing a wide range of valuation services, including contracting for real property appraisals and performing technical appraisal review duties, as assigned by the Regional Appraiser. For additional information about the duties of this position, please contact Jim Twaroski at 404-347-2871 or [jim.twaroski@usda.gov](mailto:jim.twaroski@usda.gov).

***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!**

# VALUEvent—2020

## VALUATION—APPRAISAL LEGISLATIVE UPDATE EVENT & Other Activities



**Monday, February 10, 2020 -**

**Tuesday, February 11, 2020**

*To be held at:*

**Venues To Be Announced Soon**

**Tallahassee, FL**

SAVE THE DATE!!! Appraisal Institute Members are invited to the 4th annual, [Valuation-Appraisal Legislative Update Event \(VALUEvent\)](#) in Tallahassee, FL, hosted by the Appraisal Institute's Region X. Some of the events will be co-hosted by the Region Government Relations committee and the Florida Gulf Coast Chapter.

### Monday, February 10

TBA: Brief **Florida Gulf Coast Chapter** membership 1st Quarter business meeting

1 PM—5 PM: Seminar: Ignorance Isn't Bliss: Understanding an Investigation by State Regulatory Board (4 FL CE)

5:30 PM—7:30 PM: Social Gathering at local brewery—Details to follow

### Tuesday, February 11— VALUEvent Legislative Day

8 AM—9 AM: Breakfast meeting hosted by Region X. The guest speaker will be [announced](#).

The Government Relations Committee will hand out talking points on pending legislation affecting the appraisal industry to leave with the elected officials.

CE: Appraisers will receive 4 hours of CE in Florida (and 20 points of Appraisal Institute CE) for attending the [Ignorance Isn't Bliss](#) seminar. No state credit is available for VALUEvent, however, it will be submitted to AI for 15 CE points.

9:15 AM: Proceed to the State Capital to meet with elected Representatives to discuss any bills or issues facing our industry. Appointments with legislative representatives will be pre-arranged. ([VALUEvent is free for anyone to attend; however, participation in lobbying is required to receive the discounted price for the CE seminar the day before.](#))

**VALUEvent Package Price to be announced soon!** If you are participating in the VALUEvent legislative day, the seminar cost will be subsidized by sponsors. [Participation in the legislative day are expected if registering for the discounted package. Legislative day no shows agree to pay the full seminar price.](#)

**This will be a discounted package price and will include attendance at all events including VALUEvent. The 4-Hour CE seminar and evening social will be held at a local brewery. Details to follow.**

**Sleeping Rooms** - A block of sleeping rooms will be available at the **hotel as soon as those arrangements are confirmed**. More information will follow with links to register for the seminar and/or the 2020 VALUEvent.

## 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. Candidates must ensure you are meeting your annual progress requirements. If you have not met minimum designation progress, you risk losing credit for the requirements previously completed.

**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 35 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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The Federal Housing Finance Agency and the Treasury Department announced Sept. 30 that Fannie Mae and Freddie Mac will be allowed to retain up to \$45 billion in capital as they prepare to exit conservatorship, HousingWire reported. The Trump administration previously indicated that it opposed a profit sweep of the government-sponsored enterprises. Earlier this month, Treasury Secretary Steven Mnuchin said the administration is currently looking to [end the profit sweep](#) of Fannie Mae and Freddie Mac.

## Member Spotlight

### New MAI— Tim Paul Gillespie, MAI, Wesley Chapel, FL



#### *Where do you work? How long?*

I joined Newmark Knight Frank Valuation & Advisory in 2017 at the Tampa office, where I currently serve as a First Vice President, overseeing the Healthcare portion of the Healthcare & Seniors Housing practice. Prior to Newmark Knight Frank, I served for nearly five years as a Managing Director of Salus Valuation Group, Inc., an Atlanta-based national healthcare valuation firm.

#### *How did you get started in the business?*

After graduating from the University of South Florida with a Business Management Degree, I had originally planned to go in to the Marine Corps. After discussing options with my wife, I decided to start looking for Department of Defense Jobs and interviewed with Honeywell and several other DOD related businesses. When discussing my prospects with a family friend and his family, I learned about the appraisal industry from my soon-to-be Mentor, Neil Salzgeber, MAI. Neil brought me in under his wing and taught me about the appraisal industry, specifically in healthcare as he was one of the founders of Salus Valuation Group, a boutique national healthcare valuation firm.

#### *What type of appraisal work do you do?*

I specialize in preparing valuations of a broad spectrum of healthcare-oriented properties including short term acute care hospitals, long-term acute care hospitals, rehabilitation hospitals, specialty hospitals, psychiatric hospitals, ambulatory surgery centers, behavioral healthcare facilities, dialysis centers, cancer centers and medical office buildings.

I have completed many different types of valuations, including proposed, partially completed, renovated and existing structures, as well as various consulting services such as market rent studies, going concern valuations, and highest and best use analyses for national healthcare providers.

#### *How has your practice changed in recent years?*

With the back and forth of the Affordable Care Act, new and ever-changing healthcare regulations, and the evolution of healthcare business models including new hospital types, and the growth of the behavioral healthcare industry; I have significant changes in recent years to the type of work performed, as well as the valuation techniques necessary to complete assignments and meet the user's needs.

#### *Who/what is the biggest influence for you in getting the designation?*

Norm LeZotte, MAI and Neil Salzgeber, MAI were the biggest influences and motivators in my achieving my MAI designation. Neil Salzgeber, MAI passed away in November of 2016 which left a large hole in the healthcare valuation industry which I sought to fill.

#### *Hometown?*

Wesley Chapel, Florida

#### *Favorite Hobby/Activities?*

Spending time with my family and friends, working on cars, and traveling to new places.

#### *What advice can you give to other candidates and practicing affiliates letting the demo hold them back from receiving their designation?*

The Capstone program was a good learning process and gives you a specific timeline in which you must complete certain tasks. Those deadlines will keep you from pushing the demo writing back and spending time producing appraisal reports.

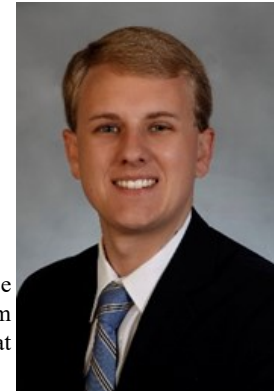
#### *Any other advice you can pass along to candidates for designation and practicing affiliates?*

Make the time to study for exams and complete the demo. You will have more opportunities as a MAI than you will as a Certified General and it will pay off in the long run for both you and the company you work for.



## Member Spotlight

### New MAI— Kyle Catlett, MAI, Tampa, FL



#### *Where do you work? How long?*

I work at Trigg, Catlett & Associates and have worked here for the past six years since graduating from college.

#### *How did you get started in the business?*

My father is a MAI and as a kid he would take me along to various inspections that he thought would be of interest that included a lime rock mine so that I could see dredging equipment and the process from beginning to end. Also, he would take me to large ranches to see the wildlife Florida has to offer that many people in the state do not have an opportunity to experience.

#### *What type of appraisal work do you do?*

We primarily focus on commercial work. More specifically we consider our firm to be a boutique firm in that we have experience in valuing a number of unique property types to include mining operations, mitigation banks, submerged lands, ports and tank farms, wastewater treatment plants, rail and transmission corridors, ecological corridors, natural springs, reservoirs, contaminated properties, large ranches and agricultural properties, conservation easements, air rights, large industrial properties as well as large processing and manufacturing plants.

#### *How has your practice changed in recent years?*

Obviously, there has been an increase in the technology not only in the report writing software but also utilizing a number of online resources that are now available.

#### *Who/what is the biggest influence for you in getting the designation?*

My father definitely was the biggest influence, however many of his friends that are also designated members which I have had the pleasure to know over the years and are now my peers include Lee Pallardy, MAI; Phil Holden, MAI; Cliff Bowen, SRA; Joe String, MAI and Doug Dane, MAI among others.

#### *Hometown?*

I was born and raised in Tampa and attended Jesuit High School. I went off to attend the University of Alabama and returned upon graduation to Tampa. I am a fourth generation Tampa native.

#### *Favorite Hobby/Activities?*

In my free time I enjoy biking with my wife, golfing with buddies, hunting/fishing or really an excuse to be outdoors. I have travelled extensively in Europe and the Caribbean.

#### *What advice can you give to other candidates and practicing affiliates letting the demo hold them back from receiving their designation?*

I would say take the Capstone Course. Although it is difficult, it is well worth it.

#### *Any other advice you can pass along to candidates for designation and practicing affiliates?*

Stick with it! I know it may sound cliché but great things are worth the time and effort. Read as many real estate articles and publications as possible. Read older versions of the Appraisal Journal as many articles still have relevance and can often solve an issue in real estate valuations.

## 2019 Leadership - Florida Gulf Coast Chapter

### *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

## Membership Updates – Florida Gulf Coast Chapter

#### **New Practicing Affiliate:**

Lourdes R. Alvarez, St. Petersburg  
Diego Hormiga, Sarasota

!

#### **Members Transferred In:**

Sara M. Bartolini (from South Florida)  
Deanna Sweeney, SRA, AI-RRS (from New York)  
David J. Yerke, MAI, AI-GRS (from Sacramento)  
Michael E. Watkins, SRA (from Atlanta)  
George Tingley, MAI (from South Carolina)



**MARK YOUR CALENDAR**  
**For the 2020 Region X VALUEvent**  
**February 10—February 11, 2020**  
**Tallahassee, FL**

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

[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).

**STBD**—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](#)

**UPS**—Appraisal Institute and UPS took the guesswork out, and put the easy in. AI Professionals now have access to new and improved **flat rate pricing** with savings of **45% on Domestic Next Day/Deferred, 25% on Ground Commercial / Residential** and **up to 50% on additional services**. In addition, AI professionals can take advantage of UPS Smart Pickup® service for free.

**JurisPro - (NEW)** As an Appraisal Institute professional, you will receive a **\$50 discount** to have your qualifications as an appraiser featured to over 800,000 attorneys by listing in the JurisPro Expert Witness Directory! If you are interested in more work as an appraisal expert witness, then you will not want to miss this Appraisal Institute Benefit.

As a member of JurisPro, your qualifications will be featured through:

- Your full page on JurisPro, the #1 website for "Real Estate Valuation Experts" on Google;
- Your full page inside LexisNexis, where three million searches are conducted every day;
- Distribution of your qualifications to over 100 bar associations; and

Importing your qualifications in-house to law firms across the United States.

No other resource puts you in a better place to receive more consulting work as an appraisal expert witness. Members of the Appraisal Institute have listed and been retained through JurisPro. Do not miss out.

Click here to list your qualifications, and to receive your \$50 discount:

[JurisPro/Appraisal Institute \\$50 Discount](#)





## 3rd Quarter 2019 Chapter Meeting & Seminars



Raise Your Appraiser IQ—Ted Whitmer, MAI



August seminar at Tampa Yacht Club



3rd Quarter Chapter Meeting at Tampa Yacht Club



Kyle Catlett presented with MAI Certificate



Entreken Achievement Award presented to Sandra K. Adomatis, SRA



Speaker Michael Twitty, MAI, Pinellas Property Appraiser



Henry Entreken, MAI with Sandy Adomatis, SRA who received the Entreken Lifetime Achievement Award



Guest Speaker Bob Henriquez, Hillsborough County Property Appraiser



NetForum Training with Chapter Executive Directors at National Office in Chicago



## 4th Quarter Meeting of the Florida Gulf Coast Chapter Friday, November 8, 2019 - Bradenton, Florida

*Please join us for the 4th quarter chapter meeting, installation & CE Program!*

### Location

**Courtyard Marriott Riverfront**

**Bradenton, Florida**

[Hotel Information](#)

**Phone: 941/747-3727**

[Directions](#)



**Note—Sleeping rooms will be available for a group discount of \$149/night until October 18th. Mention the “Appraisal Institute”**

***CLICK TO REGISTER***

### Schedule of Events

Friday, November 8, 2019

10:15 AM: Board of Directors Meeting

2 PM - 5 PM — Seminar: Artificial Intelligence, AVMs & Blockchain

5 PM—8 PM - Dinner Meeting, Installation & Program

### Fees

**Chapter Dinner Meeting Only:** \$38 (Members); \$42 (Guests)

**Seminar + Chapter Dinner Meeting:** \$205(Members; \$210 (Guests)

**Speakers:**

- ♦ AI President-Elect, Rodman Schley, MAI
- ♦ Jon Mast, CEO of the Manatee & Sarasota Builders Industry Association

We will be installing the 2020 Chapter Leadership so we hope you plan to attend and support the incoming leaders!

Register Online Today at: [www.gulfcoastai.org](http://www.gulfcoastai.org)—Go to Education Page

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

*Register Online Only!*

*Questions?*

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

Register Early and Save....

[Register Online Here](#)



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