

# The Approach



Appraisal  
Institute®

Professionals Providing  
Real Estate Solutions

## 1st Quarter Chapter Meeting & VALUEvent 2020 Tallahassee, Florida

**When:** February 10 -11, 2020

**Where:** Proof Brewing Company  
1320 S. Monroe Street

*And* **Four Points Sheraton**

316 W. Tennessee Street, Tallahassee  
[www.fourpointstallahasseedowntown.com](http://www.fourpointstallahasseedowntown.com)



Florida State Capital

### Fees:

- **\* VALUEvent (All Events):** \$89 M | \$119 NM
- **Florida Law Seminar Only:** \$89.00 M | \$109.00 NM

[REGISTER HERE](#)

The Chapter Meeting and VALUEvent Reception will be held at Proof Brewing Co. and the VALUEvent Legislative Lobby Day at the State Capital (all included in package)

*\* VALUEvent Package — includes CE seminar, reception and lobbying at State Capital. VALUEvent requires participation in lobbying to receive the package price for the Florida Law CE seminar, reception and breakfast meeting prior to lobbying.*

### Schedule of Events

#### Monday, February 10:

2 PM—5 PM: Florida Law 2020 Update - 3 FL CE Hours (at Proof Brewing Company)  
5 PM—8 PM: Brief Chapter Business Meeting followed by Region X VALUEvent Reception  
(One drink ticket included in the VALUEVENT Package at Proof Brewing Co. Food will be available at Proof for purchase.)

#### Tuesday, February 11:

8 AM—9:15 AM: VALUEvent Breakfast Meeting and speaker (at Four Points Sheraton)  
9:30 AM: [Region X 2020 VALUEvent](#) Legislative Day at State Capital

**Meeting Program:** The 1st Q chapter membership meeting in Tallahassee will be a very brief business meeting immediately after the Florida Law class. The meeting will be followed by the VALUEvent Reception at Proof Brewing Company - **register today!**

**Note**—Due to the legislative session, there are limited [sleeping rooms](#) available at the **Four Points Sheraton**. We have a block of rooms available until [January 17, 2020](#) for a reduced rate of \$199/night. [Make your hotel reservation today.](#)

We hope to see you at the 1st Quarter chapter meeting and all other events being held in Tallahassee! Stay informed about all the issues of importance to us, locally, state-wide and nationally. Take advantage of the discount price and attend all above VALUEvent events.

### 2020 Officers & Directors

#### President

Rachel Zucchi, MAI

#### Vice President

Brian Zamorski, MAI

#### Treasurer

Patricia Staebler, SRA

#### Secretary

Timothy Sunyog, MAI

#### Directors

Devon Carter, MAI  
Michael Cliggitt, MAI  
John Fabian, MAI  
Jennifer Marshall, SRA, AI-RRS  
Brad Saucier, MAI  
Byron Torres, MAI  
James "Matt" Terry, SRA  
Martin Engelmann, MAI  
Julie Battaglia, MAI, AI-GRS

### 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  
Brian Zamorski, MAI  
Julie Battaglia, MAI  
Rachel Zucchi, MAI—President

### Committee Chairs

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

### Chapter Executive Director

Nancy Bachor  
(813) 962-4003  
[info@gulfcostai.org](mailto:info@gulfcostai.org)

### Region X Officers

Nick Pilz, MAI, SRA, Chair  
Elaine Liz-Ramirez, Vice Chair  
Reggie Carter, MAI, 3rd Director  
Lauren Dowling, Region ED



## President's Message, Rachel Zucchi, MAI

Happy New Year! I am honored and humbled to serve as the 2020 President of the Florida Gulf Coast Chapter of the Appraisal Institute. Thank you to all who attended the 4th Quarter Chapter Installation Meeting. It was an honor to have the **Appraisal Institute President Elect Rodman Schley, MAI, SRA** presiding over the installation of the 2020 Officers, Board of Directors, Region Representatives, and Alternate Region Representatives. I'm also very grateful for the service and dedication of our 2019 volunteers led by our 2019 President **Julie Battaglia, MAI, AI-GRS** and of course our dedicated and very knowledgeable Executive Director, **Nancy Bachor**! Thank you! And congratulations to **Gerald Hendry, MAI**, the 2019 Henry Entreken Lifetime Achievement Award recipient! Gerald was our 2008 Chapter President and has always been more than gracious in volunteering for the Chapter. Congratulations Gerald! I also want to congratulate **Sandra Adomatis, SRA**, the 2018 Henry Entreken Lifetime Achievement Award recipient. Sandra, our 2009 Chapter President, has contributed considerably to the Appraisal Institute both on a National and Chapter level. In fact, her schedule was so jammed we weren't able to present her award until our 3Q 2019 meeting. Congratulations Sandra!



One of my goals this year is to build on the success of our Chapter and hopefully continue to increase attendance at Chapter Meetings and involvement in the Chapter. I've listened to past Presidents talk about how they got more out of the volunteer experience than they put in. I can honestly say that it's true, and I'm so glad that I got involved and there were members that were willing to give me the little nudge I needed (a special thanks to Dick Tobias, MAI; Karen Goforth, MAI; and Michael Jonas, MAI, AI-GRS). We'd love to welcome new volunteers, so please reach out to Nancy or myself if you are interested in volunteering at any time. And if you know someone who you think would be a great addition, please help by suggesting they get involved. I know they'll be glad they did!

We are going to kick off 2020 with our 1Q Chapter Meeting and our 4th annual Valuation-Appraisal Legislative Update Event (VALUEvent) in Tallahassee on Monday, February 10, 2020 and Tuesday, February 11, 2020. I'm honored to announce that **Appraisal Institute President Elect Rodman Schley, MAI, SRA** will attend the Region X event (thanks to the planning and organization of Jennifer Marshall, SRA, AI-RRS). A 3-Hour Florida Law course will be held at the **Proof Brewing Company** on Monday from 2pm - 5pm. A brief Chapter Meeting will follow the Florida Law Course. During the Chapter Meeting two (2) members will be elected to participate on our Nominating Committee, so please come prepared to nominate or volunteer. Following the meeting, there will be a **Region X VALUEvent Social Gathering/Reception**. On Tuesday morning **Region X** will host a **Breakfast Meeting** at the **Four Points Sheraton**, followed by a visit to the State Capital to meet with elected Representatives and discuss any bills or issues facing our industry. Talking points will be discussed at the breakfast meeting. Our Chapter is offering a great promotional price of only **\$39** (Use Promo Code **VALUEVENT50** when registering) **if** you participate in VALUEvent legislative day. The package includes 3-Hour Florida Law, Region X Reception - including one drink ticket, and the VALUEvent Breakfast and lobbying at the state capital. We look forward to seeing you there!

I am very excited for our upcoming year, we have a great group of 2020 officers **Vice President Brian Zamorski, MAI, Treasurer, Patricia Staebler, SRA and Secretary Tim Sunyog, MAI**. Following our Tallahassee 1Q Meeting, our 2Q Meeting will be held in Sarasota (May 14), our 3Q Meeting in Fort Myers (August 20), and our 4Q Installation Meeting will be held in Tampa (November 12).

*(Continued next page)*

## President Message, cont'd.

A 3-Hour Florida Law course will be offered with both our 2nd and 3rd Quarter Meetings. These meetings are still in the planning stages. If you have any ideas for venues or speakers, please let Nancy or myself know.

The education committee, **Julie Battaglia, MAI, Joel Salley, SRA AI-RRS, and Karen Goforth, MAI** have put together a great schedule of offerings for 2020; and have strived to select the courses and seminars that members will want to attend. Remember 2020 is a recertification year, so make your education plans early.

Finally, members will have the unique opportunity to attend the **2020 National Annual Conference** held in **Orlando** August 3, 2020 through August 5, 2020 following the Joint Region Meetings on August 2, 2020. We're hoping for a strong Region X and Florida Gulf Coast Chapter showing.

Thank you again for entrusting me in this position. I look forward to seeing you at our meetings and events and serving as your 2020 Chapter President!



### Our sincere condolences go out to the family and friends of William "Ted" Anglyn, MAI.

**William Ted Anglyn**, age 59, passed away surrounded by his loved ones at his home in Naples, Florida on Friday, November 1st 2019, after an 11 month battle with Glioblastoma.

Ted is survived by his wife, Teresa Ferruccio-Anglyn, his mother, Lillian Anglyn, his children Meredith and Ben Anglyn, his step children, Alexis Ferruccio and Jonathan Austin, his brothers, Derrell and Alan Anglyn and their families. He was preceded in death by his father, Derrell Anglyn.

Ted graduated in the top 10% of his class from Auburn University in 1982 with a Bachelors of Science in Finance. He began his appraisal career shortly thereafter and in his 37 years in the industry he has written six books on the subject and published numerous articles. He is the recipient of the 2017 *Lifetime Achievement Award* and the eponymous annual Leadership and Development Advisory Council's (LDAC) *Ted Anglyn Award*. Ted is an honorary member at multiple Appraisal Institute Chapters nationwide and was instrumental in growing membership and education programs within the Appraisal Institute. Ted leaves behind a prodigious legacy throughout the appraisal world. Ted will be dearly missed.

### Ray Carroll, MAI shared the following on his friend Ted.

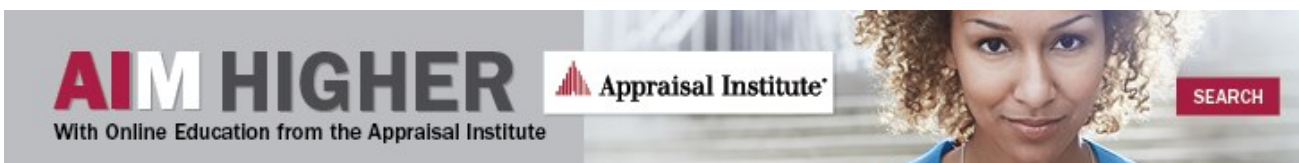
*Ted believed in himself and in others. You knew it at first meeting. The twinkle in his eye, the ready smile, and his inviting manner always drew me out. Usually, I talked when I meant to be listening. He was easy that way, and I liked being around him.*

*Ted knew that professionalism is about competency, honesty, and accountability.*

*Ted knew that family matters, and that "husband" is a verb.*

*Ted knew that friends are worth making and keeping.*

*He was a gentleman.*



## 2020 VALUEvent - Monday, February 10 - Tuesday, February 11, 2020

Appraisal Institute members are invited to attend the 4th annual, [Valuation-Appraisal - Legislative Update Event \(VALUEvent\)](#) in Tallahassee, FL, hosted by the Appraisal Institute's Region X and the Florida Gulf Coast Chapter. We are thrilled to announce that [National President-Elect Rodman Schley, MAI](#), SRA will be joining us for VALUEvent 2020.

The Appraisal Institute's **Florida Gulf Coast Chapter** will hold a brief 1st Quarter chapter meeting and seminar on Monday, February 10th at the at Proof Brewing Company followed by the Region X Reception.

On **Tuesday morning, February 11th**, the Appraisal Institute's Florida Region X, is sponsoring a **VALUEvent** continental breakfast from 8:00 -9:15 a.m. at the Four Points Sheraton. Appraisal Institute members and region representatives in Florida are encouraged to attend this event. Attendance will be limited to the first 40 participants that **RSVP HERE** or through the Florida Gulf Coast Chapter's website. There is no cost for Region X (Florida) members to attend the VALUEvent lobbying. However, [participation in the legislative day is required if registering for the discounted VALUEvent package which includes Florida Law for a discounted price of \\$39 for AI members \(promo code required when registering\).](#) [Legislative day no shows agree to pay the full seminar price of \\$89.](#)



2019 VALUEvent

We hope to have a Florida State Representative to provide an overview of new legislative items and specifically anything relevant to real estate or real estate appraisal. We will also hand out talking points on any pending legislation affecting the appraisal industry to leave with the elected officials.

After our lobbying efforts, we will have an informal lunch for those that would like to meet and de-brief any feedback received at 12:30 p.m. near the Capital. Note: Once registered for VALUEvent package, No Shows to the lobbying will be billed an additional fee..

Be on the lookout for **VALUEvent** update emails over the next few weeks with a **Call to Action** to help contact your elected official and set a meeting in Tallahassee. We hope to see many of you there to participate in this very important event. Overall, the VALUEvent has directly contributed to the successful passage of beneficial legislation for appraisers in recent years, and we will continue fighting to keep our voices heard. Please come join us and learn about the issues on the table

**Four Points Sheraton Hotel Reservations:** There is a sleeping room block available to Appraisal Institute members until January 17th. Go to: <https://www.marriott.com/event-reservations/reservation-link.mi?id=1573854359940&key=GRP&app=resvlink>



### ***Is your company 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, website, newsletters in addition to recognition at chapter meetings.*

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



## New Education Registration System Now in Effect!

The Appraisal Institute implemented a new management system as of October 2019. All AI professionals, students and customers will be required to create a new user ID and password to access your account to register for all education programs, chapter meetings or to purchase publications. The chapter **CAN NO LONGER** register students for classes or chapter meetings. When registering for any AI 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 at checkout. Please note, however, that there will be an additional materials fee plus shipping added to your total. If you order printed materials, they will now 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 you are registered for, that will be handled directly through the national office for refunds. It is recommended you notify the chapter office that you need to cancel and we can process that request to the national office.

When registering for a chapter-developed offering (example, Florida Law), you will continue to go through the Appraisal Institute website, click on Education and there will be an option to register for a Chapter Offering. Scroll to find the class you are interested in registering for. You can also go directly to the chapter website's Education page ([www.gulfcoastai.org](http://www.gulfcoastai.org)) and click on the offering you need, to be taken to the proper registration page. Each offering now has a separate URL link. If you have any questions, contact the chapter office at [wcoastfl@tampabay.rr.com](mailto:wcoastfl@tampabay.rr.com) or the national education department and [education@appraisalinstitute.org](mailto:education@appraisalinstitute.org).

## 2020 Appraisal Institute Annual Conference

The 2020 Annual Conference will be held at the JW Marriott Orlando, Grande Lakes. Located on a lush, 500-acre property, the JW is ideal for exploring the Orlando area - or for relaxing poolside in the Florida sunshine. The hotel features inviting accommodations, personalized service, and an extensive array of amenities, making your stay productive and fun.

[The JW Marriott Orlando](#)  
4040 Central Florida Parkway  
Orlando, FL 32837

Appraisal Institute has reserved a limited block of sleeping rooms with the following rates. The reservation link will be available March 2020.

- Standard Guest Room: \$135 + discounted resort fee \$25 + local 12.5% tax

The resort fee covers several amenities including enhanced in-room wireless Internet for up to six devices, unlimited local and domestic long distance calls, daily bike rental through Grande Lakes Sports, transportation to SeaWorld, Universal Studios and Disney theme parks, driving range privileges and daily recreational activities.

### ⇒ Registration will open on March 25, 2020

Plan your summer now and join us at the JW Marriott in Orlando for this year's AI Annual Conference. Last year more than 500 attendees networked with domestic and international peers at the Denver event. This year's conference promises to be better than ever. We encourage our fellow Floridians to participate in this annual conference and take advantage of this local national event.



## National Update

**AI Board of Directors Addresses 45-Day Notice Items** The Appraisal Institute Board of Directors approved two 45-Day Notice items and voted to send another item to 45-Day Notice during its Nov. 14-15 meeting in Chicago.

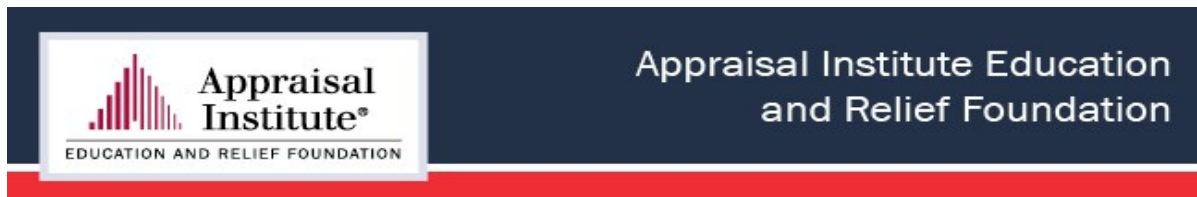
The Board adopted proposed amendments to Regulation Nos. 7 and 8 requiring the creation of a single state Chapter Government Relations Subcommittee in each state where there are multiple chapters, as set forth in the 45-Day Notice shared with AI professionals Sept. 30.

The Board also adopted amendments to Regulation Nos. 1 and 2 eliminating the defense of reports and e-demo report options for the demonstration of knowledge requirement, as found in the 45-Day Notice shared with AI professionals June 10 and July 29.

The Board additionally voted to send an item to 45-Day Notice related to proposed amendments to the Bylaws regarding Board ratification of Executive Committee actions. [Learn more about other actions the Board took at its meeting.](#)

**AI Distributes Exposure Draft of Proposed Guide Note** In case you haven't already seen it, the Appraisal Institute Board of Directors on Nov. 18 directed distribution of an exposure draft of a proposed Guide Note, "Consideration of Leases in Fee Simple Valuations," to Designated Members, Candidates for Designation, Practicing Affiliates and Affiliates for review and comment.

[View the proposed Guide Note.](#) If you have any comments on the Exposure Draft, please send your input via email to [guidenote@appraisalinstitute.org](mailto:guidenote@appraisalinstitute.org) by Jan. 15.



### AIERF Accepting Award Nominations, Offering Scholarships

Would you like to help recognize your fellow valuation professionals, or are you potentially deserving of a scholarship?

The Appraisal Institute Education and Relief Foundation is accepting nominations until March 29 for the Y.T. and Louise Lee Lum Award, which recognizes individuals who have made distinguished contributions to the valuation profession during the immediate preceding year. [Learn more.](#)

AIERF also offers several scholarships throughout the year, including two with an April 15 application deadline: AIERF Graduate Scholarship; and AIERF Minorities and Women Education Scholarship. [Learn more.](#)



<https://www.appraisalinstitute.org/reviewer/>

## Jobs Board

### Senior Healthcare Valuations Specialist

As a Senior Healthcare Valuations Specialist, you will be focused on producing thorough reports as well as fostering client relationships and consulting with them to find the best solutions. You'll work closely with senior management to develop and drive a strategic growth plan for the market. You will help mentor analysts and delve deep into market research together. Each day you will promote and advocate Colliers' brand in the local market, articulating its value through superior customer service and financial results.

[Click for more information or to apply.](#)

### 2020 Committee Chairs

Candidate Guidance:	Jennifer Marshall, SRA, AI-RRS	Nominating:	Julie Battaglia, MAI, AI-GRS
Bylaws:	Brad Saucier, MAI	Programs:	Brian Zamorski, MAI
Education:	Julie Battaglia, MAI, AI-GRS	Public Relations:	Brian Zamorski, MAI
Finance:	Patricia Staebler, SRA	University Relations:	Bruce Cumming
Government Relations:	Devon Carter, MAI	Newsletter:	Tim Sunyog   Nancy Bacher

### Government Relations Report, Devon Carter, MAI—Chair

The VALUEvent is coming up quickly. Please try to come to Tallahassee February 10<sup>th</sup> and 11<sup>th</sup> to represent the Appraisal Institute and convey our concerns. If you don't think this is a valuable effort, one of the talking points from last year's event has been introduced in regard to reducing the number of FREAB board members from nine down to seven. This may not seem like much; however, we feel that AMCs are over represented on the board. This legislation, if passed, will reduce the number of AMC board members from two to one and the general public members also from two to one.

We will, of course, meet with our representatives to urge their support for this legislation as well as other issues affecting our business.

Along with our lobbying efforts, there will be the Florida Law update seminar offered at Proof Brewing Company as well as a Region X reception at the same location. For only \$39, you can get required continuing education and network with appraisers from across the state. We hope to see you there.

### 2020 Florida Gulf Coast Chapter Meetings

*Save the dates!!*



1st Quarter Meeting - February 10 - Tallahassee  
 2nd Quarter Meeting & Elections - May 14 - Sarasota  
 3rd Quarter Meeting - August 20 - Ft. Myers  
 4th Quarter Meeting & Installation - November 12 - Tampa

*Florida Gulf Coast Chapter, Appraisal Institute*

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

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

First of all, we would like to thank everyone who attended **Florida Gulf Coast Chapter** education in 2019 and supported the chapter programs. We provide top-notch instructors and our chapter is one of the best in the country. 2020 will be a state recertification deadline year, so we have many offerings planned. Classes will be added if any timely topics arise. Remember that it is never too early to begin accumulating your CE hours for the renewal deadline, which will be **November 30, 2020**. Don't let it sneak up on you!



Julie Battaglia, MAI, AI-GRS

We are excited to get the year going with the 3-Hour Florida Appraisal Law Update in conjunction with the 1st Quarter Meeting and the **2020 VALUEvent** in Tallahassee on Monday, February 10th. This seminar is approved for 3 hours of Florida CE credit and is pending FREC credit hours. See the article on VALUEvent 2020 in the newsletter for the details on all the events.

We will start the year off running with a Florida Appraisal Law and USPAP offering on February 5—6th in Winter Haven, followed by the Florida Law on February 10th in Tallahassee. We then move the Florida Law and USPAP offerings to Destin on February 26—27th.

Early March will provide two chapter-developed seminars in Ft. Myers taught by Vince Dowling, MAI followed by another Florida Law and USPAP in Tampa on March 25—26th. The March Tampa classes will be held at the Greater Tampa Association of Realtors.

We have two offerings scheduled in April, followed by another USPAP and Florida Law in Sarasota in mid-May in conjunction with the 2nd Quarter chapter meeting. Several seminars are also planned in June and July, including more Florida Law and USPAP offerings in Tallahassee and St. Petersburg.

Our 3rd Quarter Chapter Meeting will be held on August 20th in Ft. Myers which will include another Florida Law and USPAP. September and October will provide several more chapter-developed classes in addition to the Business Practice & Ethics on October 8th.

The 4th Quarter Chapter Meeting and Installation will be held in early November in Tampa, exact date to be announced.

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 take advantage of the early registration discounts. In this time of expanding on-line education, many of you have told us you still desire a classroom setting. Your chapter exists primarily because of classroom education. We receive very minimal funding from National for the on-line programs. Our education program helps keep our chapter dues one of the lowest in the country. You can help keep our chapter financially stable by supporting our programs. Get what you need locally.

Check the website often for any new additions to the education schedule and other chapter news. The Florida Gulf Coast Chapter website can be found at [www.gulfcoastai.org](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:** <http://www.gulfcoastai.org>

**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.



## 2020 Education Schedule

### Florida Gulf Coast Chapter



Date	Class	Instructor
February 5–6	Florida Appraisal Law 2020 Winter Haven, FL 7-Hour USPAP Update	Robert Sutte, MAI Robert Sutte, MAI
February 10–11	<b>1st Quarter Chapter Meeting and VALUEvent</b> – Tallahassee Florida Appraisal Law 2020 (3 CE) 2020 VALUEvent	Clay Ketcham, MAI, SRA
February 26–27	Florida Appraisal Law 2020 Destin, FL 7-Hour USPAP Update	Clay Ketcham, MAI, SRA Clay Ketcham, MAI, SRA
March 5	Client Requested Evaluations: Appraisal Assignments Developing a Supportable Workfile Ft. Myers, FL	Vincent Dowling, MAI, SRA Vincent Dowling, MAI, SRA
March 25–26	Florida Appraisal Law 2020 Tampa, FL 7-Hour USPAP Update	Robert Sutte, MAI Robert Sutte, MAI
April 7–8	Fundamentals of Separating Real Property	TBA
April 24	A Dive into Houses with Labels & Style Tallahassee, FL	Sandra K. Adomatis, SRA
May 6	7-Hour USPAP Update Sarasota, FL	Brian Flynn, MAI, AI-GRS
May 14	<b>2nd Quarter Chapter Meeting &amp; Elections</b> - Sarasota Florida Appraisal Law 2020	Nicholas Pilz, MAI
May 21	How Tenants Create or Destroy Value: Leasehold Valuation and its Impact on Value - Tampa, FL	Brian Flynn, MAI, AI-GRS
June 2–3	Florida Appraisal Law 2020 Tallahassee, FL 7-Hour USPAP Update	Clay Ketcham, MAI Clay Ketcham, MAI
June 12	A Dive into Houses with Labels & Style Sarasota, FL	Sandra K. Adomatis, SRA
June 18	Evaluations and Validations for Appraisers – A Scope of Work Issue Tampa, FL	George Mann, MAI
July 23–24	Florida Appraisal Law 2020 St. Petersburg, FL 7-Hour USPAP Update	Nicholas Pilz, MAI Brian Flynn, MAI, AI-GRS
August 20–21	<b>3rd Quarter Chapter Meeting</b> - Ft. Myers Florida Law 2020 & 7-Hour USPAP Update	Nicholas Pilz, MAI Timothy C. Andersen, MAI
September 17	Measuring Value Reaction to Residential Home Features Highest and Best Use Puzzles Tampa, FL	Sandra K. Adomatis, SRA Sandra K. Adomatis, SRA
October 8	Business Practice & Ethics Tampa, FL	Brian Flynn, MAI, AI-GRS
October 22	Client Requested Evaluations: Appraisal Assignments Developing a Supportable Workfile Tallahassee, FL	Vincent Dowling, MAI, SRA Vincent Dowling, MAI, SRA
November 12 (tentative date)	<b>4th Quarter Chapter Meeting &amp; Installation</b> - Tampa, FL Seminar–TBA	TBA

To register for any of the above classes, go to: <http://www.gulfcoastai.org>  
 Questions? Call chapter office at (813) 962-4003 or email [info@gulfcoastai.org](mailto:info@gulfcoastai.org)

## 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.

**2020 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. Offerings are scheduled in Austin, TX, Chicago, IL, Raleigh, NC and Irvine, CA. 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.

Six candidates received their designations in 2019. **CONGRATULATIONS** to the following members:

- **Stephen D. Ihrig, II, SRA**    ● **Kyle Catlett, MAI**    ● **Marianne H. Busher, MAI**
- **Tim Gillespie, MAI**    ● **Kathryn C. Robinson, MAI**    ● **Kristin B. Repp, MAI**

## 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.

## Florida Real Estate Appraisal Board Meetings

### 2020 General Meetings

- 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. 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 407-317-7245.

### 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](#).



Do you have the  
Designated Difference?



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

*Florida Gulf Coast Chapter, Appraisal Institute*

P. O. Box 273004, Tampa, FL 33688 T: 813-962-4003 Website: [www.gulfcoastai.org](http://www.gulfcoastai.org)

## 2020 Leadership - Florida Gulf Coast Chapter

The following individuals were elected to serve the position of 2020 officers, directors and regional representatives for the **Florida Gulf Coast Chapter** and were installed at the **November 8th** chapter meeting in Bradenton. Their term began January 1, 2020. 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 - 2020 Officers*

**President:** Rachel Zucchi, MAI

**Vice President:** Brian Zamorski, MAI

**Treasurer:** Patricia Staebler, SRA

**Secretary:** Timothy Sunyog, MAI

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

Julie Battaglia, MAI, Ex-Officio

John Fabian, MAI

Brad Saucier, MAI

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

Michael Cliggitt, MAI

Devon Carter, MAI

Byron Torres, MAI

Jennifer Marshall, SRA

### **Directors (2020-2022)**

James "Matt" Terry, SRA

Martin Engelmann, MAI

### **Region X Representatives—Florida Gulf Coast**

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

Ned Palmer, MAI

Andrew Skinner, MAI

Brian Zamorski, 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

Julie Battaglia, MAI, AI-GRS

#### **Alternate Region Reps - 2020**

Karen Goforth, MAI

Patricia Staebler, SRA

Caroline Sutton, MAI

Michael Twitty, MAI

John Fabian, MAI

Wesley Sanders, MAI

Timothy Sunyog, MAI

Steve Griffith, MAI

### **2020 Comp Exam Dates**

[Click Here](#) for Comp Exam Information

Submit your applications for 2020 exams by deadline dates below :

April 1—April 30 Application Deadline—February 20, 2020

August 1—August 31 : Application Deadline—June 20, 2020

November 1—November 30: Application Deadline—September 20, 2020

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

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

**Congratulations to New Designated Member [Kathryn Robinson](#) who received MAI Certificate at November meeting.**



## Membership Updates – Florida Gulf Coast Chapter

### Congratulations New Designated Member:

Kristin B. Repp, MAI

### Candidates for Designation:

Jordan Menke

Kevin L. Williams

### Practicing Affiliates:

Nicholas V. Malin

Kevin D. Manrique

## 2020 Nominating Committee – Florida Gulf Coast Chapter

The selection of the five-member nominating committee will need to be completed at the 2nd quarter chapter meeting on May 14th in Sarasota, FL. This committee is charged with preparing a slate of nominees for the position of 2021 officers, directors and regional representatives for the **Florida Gulf Coast Chapter**.

The 2020 nominating committee will be chaired this year by immediate past president, Julie Battaglia, MAI, AI-GRS. In accordance with our Bylaws, our 2020 chapter president, Rachel Zucchi, MAI, will appoint one member and the Board of Directors will appoint one member to the nominating committee at their recent board of directors meeting. The chapter designated members, candidates, practicing affiliates and affiliates in attendance at the May chapter meeting will nominate and elect the remaining **two** members to the nominating committee. This committee will prepare a slate of 2021 nominees. If you have an interest in serving on the nominating committee, please notify Julie Battaglia prior to May 14.

**Note—if you are interested in being considered for a 2021 chapter board position, you cannot serve on the nominating committee.**

**IF YOU ARE INTERESTED** in serving on the chapter board as a Director or Region X Representation in 2021, here is your opportunity. Contact Julie to express your interest prior to the 2nd Quarter chapter meeting. Please consider getting involved with your chapter. If you have any questions, please contact Julie Battaglia or the chapter office.

### Julie Battaglia, MAI, AI-GRS

Email: [julie.battaglia1@gmail.com](mailto:julie.battaglia1@gmail.com)

2020 Nominating Committee Chair

Florida Gulf Coast Chapter



2020 Florida Gulf Coast Chapter President  
Rachel Zucchi, MAI  
with National President  
Jefferson Sherman, MAI, AI-GRS



## 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

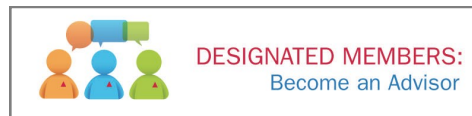
[Learn More](#)

**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. STBD 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.

**JurisPro**— New benefit. As an AI member, 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.



**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.**

## Dinner & Installation — November 8, 2019, 4th Q Meeting, Bradenton



*Award presentation to outgoing president Julie Battaglia MAI, AI-GRS by Rachel Zucchi, MAI*



*Gerald Hendry with Julie Battaglia*



*Installation Ceremony of 2020 Chapter Leadership with National President-Elect Rodman Schley, MAI presiding*



*Recipient of the 2019 Henry Entreen Lifetime Achievement Award Gerald Hendry, MAI with his wife Beth and Rodman Schley, MAI*



*Social Hour at Installation Meeting*



## 1st Quarter Meeting of the Florida Gulf Coast Chapter February 10–11, 2020 - Tallahassee, FL

*Please join us for the 1st quarter chapter meeting & other events!*

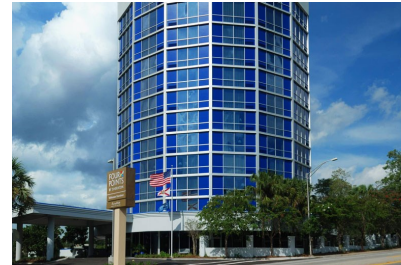
### Locations

#### Four Points Sheraton Downtown Tallahassee

316 W. Tennessee Street, Tallahassee, FL

#### Proof Brewing Company

1320 S. Monroe Street, Tallahassee, FL



Four Points Sheraton, Tallahassee

### Schedule of Events

#### Monday, February 10

2 PM - 5 PM Florida Law 2020 (3 FL CE)

5 PM: Brief Chapter Business Meeting followed by Region X VALUEvent Reception

#### Tuesday, February 11th

8 AM: VALUEvent Breakfast Meeting at Four Points Sheraton

9 AM: Legislative Day at State Capital

[CLICK TO REGISTER](#)  
SIGN UP EARLY FOR DISCOUNT!

### Fees

VALUEvent Package Price: \$39 Members | \$49 Nonmembers (*with Promo Code*) Regular Price: \$89 | \$119  
[includes 3-hour seminar, reception & drink ticket and VALUEvent breakfast meeting & lobbying event]

Florida Law Seminar ONLY: \$89 Members | \$109 Nonmembers

#### *Directions to hotel: (from Tampa Area)*

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

#### **Sleeping Rooms at Four Points Sheraton - [Click Here](#)**

*Group room block available until January 17, 2020*

**Advance Registration Required!!**

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

**[Register Online Here](#)**



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