





Visit the NAR Resource Table for tools and resources to help you communicate the value of membership!

Grand Ballroom Foyer, Marriott Rivercenter in San Antonio.



# Dear Colleagues:

On behalf of the 2016 AE Institute Advisory Board, welcome to San Antonio!

The AE Institute Advisory Board created a curriculum that hopes to meet the needs of the many facets of our careers. The Basic Ingredients to Success courses will help you perfect some of the primary elements of your job. The Industry Issues courses will tune you into some trends shaping the industry, and help you take a forward-looking approach to your association management style. And the Technology, MLS, and Communications courses will help you make the most of the tools out there so your members thrive.

Some of the great networking opportunities you'll have include the Welcome Lounge on Friday afternoon and the Icebreaker Reception on Saturday. Go up to an unfamiliar face and introduce yourself. Establish some connections here that will take you through your career. You can do it – we've all done it.

We have a wonderful group of sponsors that continue to support this event year after year. Please thank them for their support and take some time to learn about the products and services they offer to help you and your members succeed.

Over the next few days I encourage you to open your minds, share your experiences, get inspired to energize your career. And please, feel free to share any feedback you have while on site. We want this to be your best Institute yet.

Again, on behalf of the AE Institute Advisory Board, welcome and have a great Institute!

Theresa Hatton, CAE, RCE Chair, 2016 AE Institute Advisory Board



#### **REGISTRATION HOURS**

Marriott Rivercenter
Third Floor

Friday, March 11 7:30 a.m. - 5:30 p.m.

Saturday, March 12 7:30 a.m. - 4:30 p.m.

Sunday, March 13 8:00 a.m. - 3:00 p.m.

\*An information desk will be available Monday, March 14, 8:00 a.m. - 2:00 p.m.

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#### **AAI EVENT APP**

Visit aei.barcoderealty.com or scan the QR code to access the AEI Event app. Pick your favorite sessions, read up on speakers, and view and bid on silent auction items all on your mobile device!



1 707-8We Scan (893-7226) info@barcodepublicity.com









NAR & RPAC thank the 2015-2016 Association Executives who are RPAC Major Investors attending the 2016 AE Institute for their generous support of the REALTOR® Party.

#### **Golden R**

David Bennett Karl Berron Andrea Bushnell Robert Campau Isaac Chavez Laura Crowther Varde∥ Curtis ●★ Ginger Downs ●★ Bob Fletcher ●★ Steve Francks •\* John Fridlington ●★ Chris Galler ●★ Jarrod Grasso • Richard Haggerty Stephen Harding • Tessa Hultz Al Ingraham ●★ Travis Kessler •\* Teresa Kinney ●★ Edward Krauze Nick Kremydas ●★ Chris Kyler ●★ Duncan MacKenzie Bill Martin • Randy McCaslin Christopher Nave ●★ David Phillips John Sebree •\* Joel Singer •\* Ronald Stephan \*

Michael Theo Richard Thomas \* Jonathan Wallace Robert Wigton ●★ Dale Zahn •

#### **Crystal R**

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#### 2016 ASSOCIATION EXECUTIVES INSTITUTE ADVISORY BOARD



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Very small

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Very small

#### **CONGRATULATIONS 2015 RCEs!**

Warren Andrich, RCE, Corpus Christi Association of REALTORS®, TX

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Kaaren Winkler, RCE, Washington Association of REALTORS®

Lisa Yelichek, RCE, Stark County Association of REALTORS®, OH







Congratulations to the RCE designation on its 25th anniversary

NAR Pavilion Saturday, March 12 7:00 a.m. – 1:30 p.m. & 4:00 p.m. – 5:00 p.m.

Sunday, March 13 7:00 a.m. – 1:30 p.m.





Be sure to visit the NAR Pavilion where you can learn about the latest products and services from the following NAR areas:

- Association Leadership Development (ALD)
- Commercial
- Information Central
- NAR HR/Business Consulting Services
- NAR Global
- NAR Resource (& MVP Program) Table
- Consumer Advertising Campaign
- RAMCO
- Real Estate Today Radio
- RPAC
- REALTORS® Insurance Marketplace

- realtor.com®
- Realtor® Party & RPAC
- Realtors Property Resource® (RPR®)
- REALTORS® Federal Credit Union, a Division of Northwest Federal Credit Union
- REALTOR Team Store<sup>®</sup>
- REALTOR® University
- REBAC ABR® and e-PRO®
- SentriLock, LLC
- Xceligent, Inc.
- zipLogix

### NOTE:



REALTOR Benefits® Program Partners in Blue



NAR Strategic Investment Companies in Italics

#### NAR Pavilion Hosted Snack Break Sunday, March 13, 2:45 p.m. – 3:15 p.m.

Take some time to see and hear all that NAR has to offer your association and enjoy a little afternoon treat at the same time. The NAR Pavilion is sponsoring a snack break on Sunday afternoon and will feature mini presentations about the various NAR products and services. You'll have a dedicated block of time to see and hear what NAR has been up to and what will benefit your members going forward.

Sponsored by: NAR Pavilion

# AEI SILENT AUCTION

#### Grand Ballroom Foyer, Third Floor

Be sure to stop by the AEI Silent Auction and bid on some of the great prizes, including a variety of giftcards and a REBAC course licensing agreement. All proceeds from the silent auction benefit the AE Professional Development Fund, which supports education and professional development for all AEs across the country.

Follow the bidding on aei.barcoderealty. com. The silent auction closes at 4:00 p.m. on Sunday, March 13.

#### SPECIAL EVENTS AT-A-GLANCE

#### AE Institute Welcome Lounge Friday, March 11, 4:00 p.m. – 6:00 p.m.

#### Grand Ballroom Salon H, Third Floor

Stop by for some refreshments and information about San Antonio and meet the 2016 AE Institute Advisory Board.

Sponsored by: The Texas Association of REALTORS® and the San Antonio Board of REALTORS®, TX

# **AE Institute Orientation** Friday, March 11, 5:30 p.m. – 6:00 p.m.

#### Grand Ballroom Salon L, Third Floor

Learn how to select the right Institute sessions for you so you make the most out of your Institute experience. Orientation is a great opportunity to meet your peers.

# AE Young Professional Network (YPN) Meet Up Friday, March 11, 6:00 p.m. – 7:00 p.m.

#### Barriba Cantina, 111 West Crockett Street

Attend this session and be a part of the AEC's Young Professional AE Network. Network with other YPNers and share how you can make a difference in your association and the industry.







# Opening Session Saturday, March 12, 8:00 a.m. – 9:30 a.m.

#### Grand Ballroom Salon A-F, Third Floor

The Opening Session is the official kick-off to the 2016 AE Institute. Come and meet the 2016 AEI team, and leave exhilarated by a keynote address from Victoria LaBalme, who will share how to apply key principles from the performing arts to catapult your communications to the next level. Victoria believes that there are untapped talents hiding inside leaders and organizations, and when you show people how to strategically infuse certain outside gifts into their business communications, you increase engagement, excitement and impact. You innovate, inspire, and distinguish your brand. And yes, your bottom line blooms. You'll also hear from 2016 NAR President Tom Salomone, who'll offer some special remarks.

Sponsored by: realtor.com

#### "Taste of AEI" Sponsor Walk-Around Lunch Saturday, March 12, 12:15 p.m. – 1:30 p.m.

Alamo Ballroom Foyer – Marriott Riverwalk:

Salon A – Showing Time Salon E – MMSI
Salon B – W&R Studios Salon F – Centralized Showing Service

The AE Institute's sponsoring vendors will host lunch in the various hospitality rooms. Participants can enjoy their lunch while learning about different products available to them and their members.

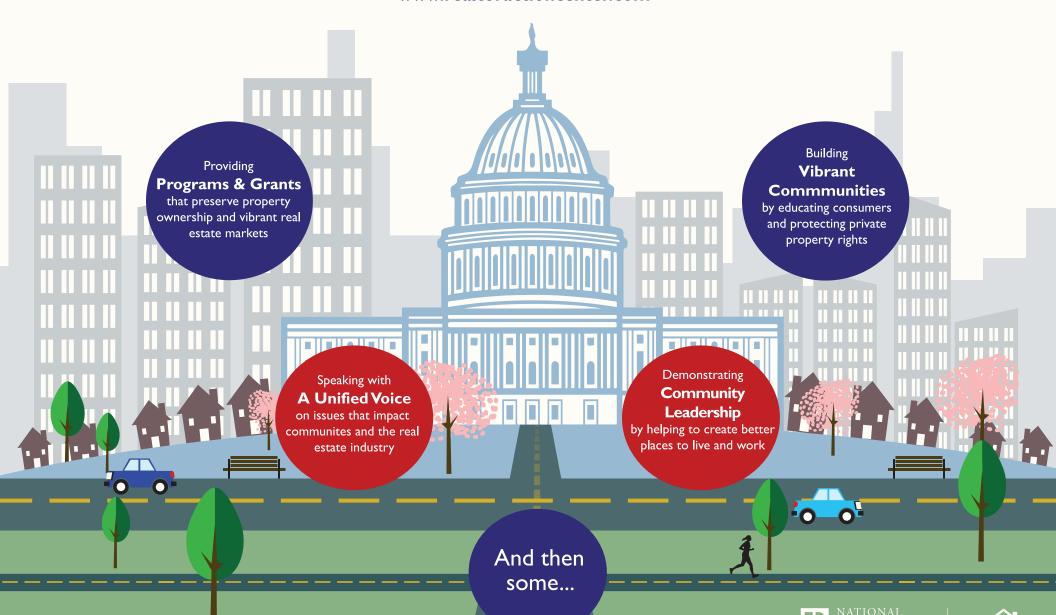
#### New AE Networking Reception Saturday, March 12, 4:00 p.m. – 5:00 p.m.

#### Grand Ballroom Salon GM, Third Floor

What a great way to build on your relationships with other AEs who are also just starting out in the business and are new to the Institute. Come network with a group whose faces will become familiar to you by the end of the Institute.

# VOTE \* ACT \* INVEST

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#### SPECIAL EVENTS AT-A-GLANCE

# Icebreaker Reception Saturday, March 12, 5:00 p.m. – 6:30 p.m.

#### Grand Ballroom Salon A-F, Third Floor

Join your friends and colleagues for this special Institute welcome reception where there will be good food, good music, and good company.

Sponsored by: SUPRA

#### **State Chief Staff Meeting** Saturday, March 12, 1:30 p.m. – 4:00 p.m.

#### Conference Room 1-3, Third Floor

An opportunity for state association chief staff executives to discuss issues and share insights. Attendance is limited to state chief staff only.

#### AE Institute Apparel Day Sunday, March 13

Show your AE Institute spirit by sporting your commemorative 2016 AE Institute wear.

#### NAR AE Forum

Sunday, March 13, 8:00 a.m. - 9:00 a.m.

#### Grand Ballroom Salon A-F, Third Floor

This special open forum allows AEs to hear updates and participate in discussions about the issues impacting their associations and their members.

#### NAR Update Lunch Sunday, March 13, 12:00 p.m. – 1:30 p.m.

#### Grand Ballroom Salon A-F, Third Floor

Join NAR CEO Dale Stinton, RCE, CAE, for an update on NAR issues. Ask the questions you need answers to in this open forum with your peers and national counterpart.

#### Sponsored by: NAR Office of the CEO

#### RPAC Major Investor Reception Sunday, March 13, 4:15 p.m. – 5:15 p.m.

#### Sazo's, Second Floor

This special reception is for RPAC major investors.

#### **General Session**

Monday, March 14, 8:00 a.m. - 9:00 a.m.

#### Grand Ballroom Salon A-F, Third Floor

The 2016 AE Institute Advisory Board invites you to join Mark Sanborn, president of Sanborn & Associates, Inc., an idea studio dedicated to developing leaders in business and in life. Mark is an international bestselling author and noted authority on leadership, team building, customer service and change, and he'll share with you the exciting opportunities that await you when you pursue your own potential.

#### REALTOR® Party Luncheon Monday, March 14, 11:45 a.m. – 1:15 p.m.

#### Grand Ballroom Salon A-F, Third Floor

As a REALTOR® association executive, you know that politics plays an important role in your members' profession. Come enjoy lunch and sharpen your political insights with a special keynote address by Howard Fineman, MSNBC political analyst and Global Editorial Director of *The Huffington Post*.

#### Sponsored by: REALTOR® Party

#### **Legal Update**

Monday, March 14, 1:30 p.m. - 2:30 p.m.

#### Grand Ballroom Salon A-F, Third Floor

Join NAR General Counsel Katie Johnson for an update on the legal issues impacting REALTOR® associations across the country.

#### RCE @ AEI



Lifelong learning is a critical element to continued success. The AE Institute Advisory Board and the RCE Certification Advisory Board both bring exciting opportunities for you to achieve that success. You'll earn 25 points toward your RCE applicant data form for attending the Institute and take away practical information, share ideas, meet others interested in the designation with whom you may form a study team, and even have some fun.

# **RCE Exam** Friday, March 11, 8:00 a.m. – 11:45 a.m.

Conference Room 11, Third Floor

#### RCE CAE Plus Exam Friday, March 11, 8:00 a.m. – 9:45 a.m.

Conference Room 9, Third Floor

# **RCE Study Session -- \$149** Friday, March 11, 8:30 a.m. - 4:00 p.m.

#### Conference Room 12, Third Floor

Join fellow RCE designation candidates and work together to prepare for the RCE designation exam. This day-long study session will put you in your comfort zone and help confirm all that you know so you're ready to sit for the exam.

# RCE Designee "Early Access Pass" to Icebreaker Reception

Saturday, March 12, 4:00 p.m. - 5:00 p.m.

#### Grand Ballroom Salon A-F, Third Floor

A special opportunity for RCE designees to celebrate the designation's 25th anniversary and network and renew friendships before the rest of the Institute registrants arrive at the Icebreaker. This special pre-Icebreaker reception is just for RCE designees.

#### RCE Overview and ADF Workshop Monday, March 14, 7:15 a.m. – 8:00 a.m.

#### Grand Ballroom Salon IJ, Third Floor

Need help filling out the RCE Applicant Data Form (ADF)? Come to this nuts and bolts work session and walk through the ADF. Learn about the RCE designation process, including how to maximize your ADF points.







# WORKING TOGETHER TO KEEP REALTORS® AT THE CENTER OF THE TRANSACTION

In 2016, NAR will be providing a valuable member benefit to REALTORS® nationwide. The new benefit includes zipLogix' robust transaction management system, an exclusive NAR national forms library, and state and local forms libraries provided the forms are licensed by your association or board. With this step toward a comprehensive transaction platform, NAR is committed to making sure REALTORS® have the tools they need to succeed in today's dynamic real estate environment and remain at the center of the real estate transaction.

This benefit also presents the opportunity to strengthen and grow the REALTOR® family, encouraging membership with your local association, by providing what members need – Your Association's or Board's Forms, the latest transaction management system and the Exclusive and Official Forms Software of the National Association of REALTORS® – zipForm® with zipTMS™. Visit www.ziplogix.com/narbenefit to learn more.

Visit our Display Table in the Grand Ballroom Foyer on Saturday & Sunday or call 866-693-6767

#### **AE FUNDAMENTALS SESSIONS**

These classes are an extension of NAR's New AE Orientation sessions and teach you about the basics of REALTOR® association management. While geared toward new AEs, these sessions are open to all Institute attendees.

#### NRDS and E-Commerce Saturday, March 12, 2:00 p.m. – 2:45 p.m.

#### Grand Ballroom Salon GM, Third Floor

Chris DeRosa, RCE, CAE, IOM, Managing Director, Finance, NAR

Come learn what you need to do to maintain members' NRDS data, and learn the importance of how NRDS data interacts with the local, state, and national associations, as well as other systems such as realtor.com, the Action Center, mailing lists, and more. Bring your questions and Chris will supply the answers.

#### New AE Networking Reception Saturday, March 12, 4:00 p.m. – 5:00 p.m.

#### Grand Ballroom Salon GM, Third Floor

What a great way to build on your relationships with other AEs who are also just starting out in the business and are new to the Institute. Come network with a group whose faces will become familiar to you by the end of the Institute.

# NAR Dues Policies and Dues Remittance Procedures Sunday, March 13, 7:00 a.m. – 7:45 a.m.

#### Grand Ballroom Salon HLK, Third Floor

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR; Patty Garcia, Managing Director, Credit and Revenue Processing Services, NAR

Attend this session and get the answers to your questions about the NAR dues remittance and collection process. Some of the specific topics covered include dues definitions in NAR's bylaws, local association staff responsibilities with respect to NAR's dues reconciliation and remittance process, consumer advertising campaign assessments, institute affiliate member dues, and the NAR delinquency/collection process.

#### I'm a New AE, Now What? Sunday, March 13, 11:00 a.m. – 11:45 a.m.

#### Grand Ballroom Salon IJ, Third Floor

Cindy Butts, RCE, CAE, CEO, Connecticut Association of REALTORS®

The first year on the job can be a series of surprises, combined with the necessity of learning, managing, and navigating a wide range of activities and personalities. And it can be overwhelming, to say the least. Find out what you should look for, common mistakes made the first year, and resources available to you.

#### NAR Policy 101 Sunday, March 13, 3:00 p.m. – 3:45 p.m.

#### Grand Ballroom Salon HLK, Third Floor

Rodney Gansho, RCE, Managing Director, Member Policy, Board Policy & Programs, NAR

Policy is just one of the many facets of a REALTOR® association executive's job. Is it possible to know everything about policy? Probably not. But with the tools available to you from NAR, you'll be well on your way to managing policy issues at your association. Learn about NAR's policy review process, Code of Ethics training, online resources, and other "need-to-know" information to understand this key component of REALTOR® association management.

#### FRIDAY, MARCH 11 - PRE-INSTITUTE EVENTS

# CEO Track (SOLD OUT) 8:00 a.m. – 4:30 p.m.

Grand Ballroom Salon H, Third Floor

# Certified Professional Standards Administration (\$35) 8:00 a.m. – 5:00 p.m.

#### Grand Ballroom Salon I, Third Floor

Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®, NY; Diane Mosley, RCE, Director, Training and Policy Resources, NAR; Patrick Reilly, RCE, Vice President, Member Services, New York State Association of REALTORS®

The Professional Standards Administrator training will teach you how to handle the complexities of professional standards administration, such as processing appeals and conducting hearings. You'll also learn about enforcement procedures and other legal ramifications. If you attend the entire day and complete and pass the professional standards exam, you will receive a certificate attesting to the fact you successfully completed the course.

# **REALTOR® Party Immersion Day Training** 8:30 a.m. – 3:00 p.m.

#### Grand Ballroom Salon G, Third Floor

Join this session to break down what "advocacy" really means for REALTOR® associations. This interactive workshop will use association scenarios to simulate how to build an advocacy plan. Choose from the programs, tools and services highlighted in this training to create your plan for 2016 and on. Lunch provided.

#### e-PRO Day 1 - (\$75 - includes lunch) 8:30 a.m. - 4:30 p.m.

#### Conference Room 1-2, Third Floor

Bill Lublin, CRB, CRS, e-PRO, GRI, Managing Member, Social Media Marketing Institute, Huntingdon Valley, PA

The new e-PRO® gives you a roadmap to build your association's business and serve the hyper-connected member and consumer of today and tomorrow. Day 1 teaches about the changing market, how to connect with your members, and how to manage your association's online reputation. Upon completion of Day 1, students must complete Day 2 online (for an additional fee) to earn the e-PRO® certification.

#### CIPS Global Programs for Associations – (\$95 – includes lunch) 8:30 a.m. – 4:30 p.m.

#### Conference Room 3-4. Third Floor

Interested in developing or growing global programs in your association? This course will help guide you through the development of a business and governance model that best fits your association structure. Learn strategies, discover creative sources for funding, and use NAR resources and support to educate members on the global marketplace and its local advantages.

# CMLS Best Practices Manual Overview 9:00 a.m. – 4:00 p.m.

#### Grand Ballroom Salon J, Third Floor

Provided by the Council of Multiple Listing Services (CMLS) and based on the recently published *CMLS Best Practices*, which were created to improve professional standards in the MLS industry, these courses will help you honestly assess your organization. Take the challenge to adopt the CMLS best practices. Your customers will be happier, employee satisfaction will increase, your volunteers will step up, and your organization will thrive.



# Commercial Real Estate is all around you.

It's part of your association too.

Make sure your members have the best tools for success.

Visit the Commercial table to learn more about NAR's resources for you and your members.



#### FRIDAY, MARCH 11 – PRE-INSTITUTE EVENTS

# Commercial Membership by Design – (\$75) 1:00 p.m. – 4:30 p.m.

#### Grand Ballroom Salon K, Third Floor

Did you know that every REALTOR® association has members that are involved in commercial real estate? Learn how to engage your existing commercial membership base, educate your entire membership on key commercial industry statistics and issues, and attract new commercial members through intentional "by design" involvement. NAR's complete array of resources offers practical tools that you can implement immediately.

# RAMCO Leadership Team Meeting 1:00 p.m. – 5:00 p.m.

Conference Room 13-14, Third Floor

# The REALTOR® PAC Management System Overview 2:00 p.m. – 2:30 p.m.

Conference Room 7, Third Floor

# The REALTOR® PAC Management System Credentialing Session 2:45 p.m. – 3:45 p.m.

Conference Room 7, Third Floor







# Realtors Property Resource® – Exclusive Association Resources

3:00 p.m. – 4:00 p.m.

#### Conference Room 5, Third Floor

Up your game and learn how RPR's Dashboard equips AEs, GADs, and FPCs to be The Voice for Real Estate® and meet Core Standards requirements through key features including local market data and Economic Area Reports. We'll show you the unique ways associations and REALTORS® use this exclusive member benefit in their business. We'll put you and your members in the driver's seat to be the trusted source of real estate information in your marketplace.

# AE Institute Welcome Lounge 4:00 p.m. – 6:00 p.m.

Grand Ballroom Salon H, Third Floor

Sponsored by: The Texas Association of REALTORS® and the San Antonio Board of REALTORS®, TX

# **Using the PAC Management System to Achieve Recognition**

4:00 p.m. – 4:45 p.m.

Conference Room 7, Third Floor

#### AE Institute Orientation

5:30 p.m. – 6:00 p.m.

Grand Ballroom Salon L, Third Floor

# AE Young Professional Network (YPN) Meet Up 6:00 p.m. – 7:00 p.m.

Barriba Caontina, 111 West Crockett Street

#### AE INSTITUTE PROGRAMMING TRACKS

#### **Basic Ingredients to Success**

Whether you're an AE of 30 days or 30 years, there are key tools and resources you need to run a successful organization. Let's get back to the basics and reexamine the framework of our associations. From financial procedures and audits to human resources and staffing, learn how to work together with your volunteer leaders to strengthen your association's foundation. Gain practical advice on how to engage new members in association activities, and how to boost advocacy efforts without a GAD.

#### **Industry Issues**

The real estate industry is affected by so many economic and technological forces and influences. To thrive and survive in the current environment, REALTOR® associations must be part of the change. Learn how you can help members succeed in their business with affordable and effective technologies and practices. And learn how to position your association or MLS to adapt or stay ahead of the next new trend.

This track is sponsored by: dynaConnections

#### Technology, MLS, & Communications

All three are necessary to your association and all are in a constant state of flux. Discover new technologies and communication strategies that will increase your efficiency and enhance your ability to connect with members on a new level. Learn how to stay fluid so your association can quickly adapt to the next MLS trend. Keep current with your skills and learn some state-of-the art practices that will put you on the cutting edge as a forward-thinking association from which your members can learn.

This track is sponsored by: Form Simplicity and Tech Helpline

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- Profiles on realtor.com® deliver inquiries directly to the agent and allow consumers interested in you to see your accomplishments, ratings, reviews and recommendations.

> Get started: realtor.com/agentprofile

#### **SATURDAY, MARCH 12**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

#### **Continental Breakfast**

7:00 a.m. - 8:00 a.m.

Grand Ballroom Foyer, Third Floor

Sponsored by:

#### **Opening Session**

8:00 a.m. - 9:30 a.m.

Grand Ballroom Salon A-F, Third Floor

Sponsored by: realtor.com

#### **CEO Track (SOLD OUT)**

9:45 a.m. – 4:00 p.m.

Alamo Ballroom Salon CD, Marriott Riverwalk

# • Turn Top Producers into Engaged Volunteers 9:45 a.m. – 10:30 a.m.

#### Grand Ballroom Salon GM, Third Floor

Brian Copeland, Chief of Broker Services, CRS, GRI, CIPS, ABR, e-PRO, Village Real Estate, Nashville, TN

Are your top producers actively engaged in association activities? If so, has it been a struggle or a pleasure to involve them? Develop an understanding for what these successful members need and want from the association, and then learn how to deliver it so that they get engaged, stay engaged, and become champions for the association.

# What is Your New Core Value – MLS or Advocacy? 9:45 a.m. – 10:30 a.m.

#### Grand Ballroom Salon IJ, Third Floor

Kevin Sears, Broker/Owner, Sears Real Estate, Springfield, MA; John Sebree, CEO, Missouri Association of REALTORS®; David Stark, Public Affairs Director, Bay East Association of REALTORS®, CA

The MLS is not your core value, no matter what your members say. Learn how and why advocacy is where you need to demonstrate – and sell – the value of membership. This hands-on session will help you prepare messaging that drives home the value of advocacy.

# • Technology Tools Your Team Will Love 9:45 a.m. – 10:30 a.m.

#### Grand Ballroom Salon HLK, Third Floor

Craig Grant, e-PRO, Chief Technology Officer, The Real Estate Technology Institute, Stuart, FL

Explore the increasing role of social media, video, and visual in your association communications, marketing, recruitment, and retention efforts. Then learn about some inexpensive, easy-to-use technology tools that will enhance your efforts and help you better connect with members and staff.

#### **SATURDAY, MARCH 12**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

 Bore-ientation and Beyond: Fix Your Members' First-Year Experience 10:45 a.m. – 12:00 p.m.

Grand Ballroom Salon GM, Third Floor

Breanna Vanstrom, RCE, e-PRO, CEO, Boise Regional REALTORS®, ID

Gone are the days of welcoming new members to the association with a REALTOR® pin and a boring five-hour program highlighting all that the association website has to offer. Create an immediate, significant connection with new members via an orientation that links association services to their business tasks. Learn how to continue meaningful communication and engage them throughout their first year so that they understand the association's value and relevance.



 Game of Groans and Other International Incidents 10:45 a.m. – 12:00 p.m.

Grand Ballroom Salon IJ, Third Floor

Facilitator: Ron Phipps, ABR, GRI, CIPS, CRS, GREEN, Broker,

Phipps Realty, Warwick, RI

Role Players: Isaac Chavez, RCE, CIPS, SRES, RSPS, e-PRO, AHWD, SFR, CEO, Vermont Association of REALTORS®; Nobu Hata, Director, Member Engagement, NAR; Cliff Long, RCE, CIPS, Executive Officer, Birmingham Area Association of REALTORS and the Greater Alabama MLS, AL; Susan Martin-Phipps, CIPS, GRI, Phipps Real Estate Services, East Greenwich, RI; Allen Tennant, CEO, Calgary Real Estate Board, Alberta, Canada; Christine Todd, Association Consultant, Dynamic Directions, Inc, Newington, CT; Albert Tran, CIPS, e-PRO, Executive Officer, West San Gabriel Valley Association of REALTORS®, CA

According to the NAR Profile of International Home Buying Activity, REALTORS® reported \$104 billion of foreign investment in residential property from March 2014 - March 2015. Discover the do's and don'ts of working in the global marketplace. This interactive session will highlight some cultural/business blunders that may seem harmless but are quite offensive to foreign buyers and sellers. The workshop-style format of this class will allow you to brainstorm some ideas and strategies to put members in touch with cultural nuances that can make or break an international transaction.

# LEARN FROM THE BEST! Session Recordings from the 2016 NAR AE Institute

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#### **SATURDAY, MARCH 12**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

#### • MLS Armageddon 10:45 a.m. – 12:00 p.m.

#### Grand Ballroom Salon HLK, Third Floor

Facilitator: John Mosey, President, Northstar MLS, St. Paul, MN

Panelists: David Charron, President & CEO, MRIS, Rockville, MD; Richard Lull, Managing Director, MLS Solutions, Black Knight Financial Services, Jacksonville, FL; Dale Ross, CRB, CEO, Realtors Property Resource®, LLC, Chicago, IL

Multiple listing service is an important business tool associations offer their members. Is it in jeopardy? Is it still relevant? What would happen to members and associations if it went away? Will Upstream and AMP save the day? This panel of thought leaders will present provocative perspectives to help prepare you for any possible MLS scenario. Stretch your thinking and start preparing so that an MLS armageddon doesn't happen to you.

# "Taste of AEI" Sponsor Walk-Around Lunch 12:15 p.m. – 1:30 p.m.

Alamo Ballroom Foyer - Marriott Riverwalk

Salon A – Showing Time Salon E – MMSI
Salon B – W&R Studios Salon F – Centralized Showing Service

The AE Institute's sponsoring vendors will host lunch in the various hospitality rooms. Participants can enjoy their lunch while learning about different products available to them and their members.

## Association Investment Program (AIP) One-on-One Session

1:00 p.m. – 4:00 p.m.

#### Conference Room 9, Third Floor

Want to speak individually about your association investment reserves? The AIP provides associations of all sizes access to full-service financial professionals who specialize in investing for nonprofit organizations.

#### **State Chief Staff Meeting**

1:30 p.m. - 4:00 p.m.

#### Conference Room 1-3, Third Floor

An opportunity for state association chief staff executives to discuss issues and share insights. Attendance is limited to state chief staff only.

#### **NAR NRDS and E-Commerce**

2:00 p.m. - 2:45 p.m.

Chris DeRosa, RCE, CAE, IOM, Managing Director, Finance, NAR

#### Grand Ballroom Salon GM, Third Floor

Come learn what you need to do to maintain members' NRDS data, and learn the importance of how NRDS data interacts with the local, state, and national associations, as well as other systems such as realtor.com and the Action Center. Discover additional tools available in NRDS that will help you with the Core Standards. Bring your questions and Chris will supply the answers.

#### Move from a Governance Board to an Innovative Board 2:00 p.m. – 2:45 p.m.

#### Grand Ballroom Salon IJ, Third Floor

Sherri Pickard, GRI, SFR, Manager, Coldwell Banker Sea Coast Advantage, Wilmington, NC; Jerry Panz, RCE, CAE, e-PRO, CEO, Wilmington Regional Association of REALTORS®, NC

How would you like to reduce the number of board meetings you conduct each year? And how would you like to focus those meetings on the association's future and its strategic plan implementation? Learn how to establish a plan to start the conversation with leadership so you can get your board moving in a new direction.



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#### **SATURDAY, MARCH 12**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

Content Marketing to Empower a Member Audience
 2:00 p.m. – 2:45 p.m.

#### Grand Ballroom Salon HLK, Third Floor

Seth Price, Vice President of Sales & Marketing, Placester, Boston, MA

Walk through a step-by-step content mapping process that shows you how to create meaningful association member content. Learn how to build trust and engagement with members while leveraging overarching campaigns to promote your annual convention, workshops, membership renewals, mentoring programs, and more. Attain new resources, worksheets, and reference guides that will help you administer a manageable content marketing strategy.

• AE Report Card 3:00 p.m. – 4:00 p.m.

#### Grand Ballroom Salon GM, Third Floor

Adorna Carroll, ABR, CIPS, CRB, e-PRO, GRI, SRS, SFR, President, Dynamic Directions, Inc., Newington, CT; Ginny Shipe, CAE, CEO, Real Estate Business Institute, Chicago, IL

It's difficult for some leaders to fully understand all that an AE job entails. As a result, they may under-evaluate AE performance, or neglect certain aspects of the job that are time-consuming but not highly visible. See how to implement an objective system that evaluates performance in a way that leadership understands and appreciates, so that you are fairly rewarded for all that you do.

Fiscal Integrity, Fraud Detection, and the Core Standards
 3:00 p.m. – 4:00 p.m.

#### Grand Ballroom Salon IJ, Third Floor

Kevin McCoy, CPA, CFF, Managing Director, Marvin and Company, P.C., CPA, Latham, NY

Fraud occurs every day and everywhere. It's an AE's responsibility to be informed on the techniques and practices to prevent and detect fraud. This interactive discussion of actual fraud cases will help you recognize areas of weakness in your internal controls that may lead to fraud and misappropriations. Gain a better understanding of how the financial reporting Core Standards requirements will help you maintain association fiscal integrity.

• Five Speeches Every Volunteer Leader Needs to Make 3:00 p.m. – 4:00 p.m.

#### Grand Ballroom Salon HLK. Third Floor

John Gormley, RCE, CAE, CEO, St. Louis Association of REALTORS®, MO; David Greer, Vice President, Consumer & Media Communications, NAR

Gain clarity on how to build better relationships through personal, relevant, and effective communication. Discover the incredible impact you'll have when you use the right words with the right audience. Then take this information and put it to use with your leaders. Review the most common forms of public speaking, how to work with volunteers to cultivate their message and deliver a successful address, and how to help them improve performance.

# New AE Networking Reception 4:00 p.m. – 5:00 p.m.

#### Grand Ballroom Salon GM, Third Floor

What a great way to build on your relationships with other AEs who are also just starting out in the business and are new to the Institute. Come network with a group whose faces will become familiar to you by the end of the Institute.

#### **SATURDAY, MARCH 12**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

# RCE Designee "Early Access Pass" to Icebreaker Reception 4:00 p.m. – 5:00 p.m.

# RCE

#### Grand Ballroom Salon A-F, Third Floor

A special opportunity for RCE designees to celebrate the designation's 25th anniversary and network and renew friendships before the rest of the Institute registrants arrive at the Icebreaker. This special pre-Icebreaker reception is just for RCE designees.

# The REALTOR® PAC Management System Overview 4:00 p.m. – 4:30 p.m.

Conference Room 7, Third Floor

#### **Icebreaker Reception**

5:00 p.m. - 6:30 p.m.

#### Grand Ballroom Salon A-F, Third Floor

Join your friends and colleagues for this special Institute welcome reception where there will be good food, good music, and good company.

Sponsored by: SUPRA

#### **SUNDAY, MARCH 13 – AEI APPAREL DAY**

#### **Continental Breakfast**

7:00 a.m. - 8:00 a.m.

Grand Ballroom Foyer, Third Floor

Sponsored by:

# NAR Dues Policies and Dues Remittance Procedures 7:00 a.m. – 7:45 a.m.

#### Grand Ballroom Salon HLK, Third Floor

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR; Patty Garcia, Managing Director, Credit and Revenue Processing Services, NAR

Attend this session and get the answers to your questions about the NAR dues remittance and collection process. Some of the specific topics covered include dues definitions in NAR's bylaws, local association staff responsibilities with respect to NAR's dues reconciliation and remittance process, consumer advertising campaign assessments, institute affiliate member dues, and the NAR delinquency/collection process.

#### **NAR AE Forum**

8:00 a.m. – 9:00 a.m.

#### Grand Ballroom Salon A-F, Third Floor

This special open forum allows AEs to hear updates and participate in discussions about the issues impacting their associations and their members.

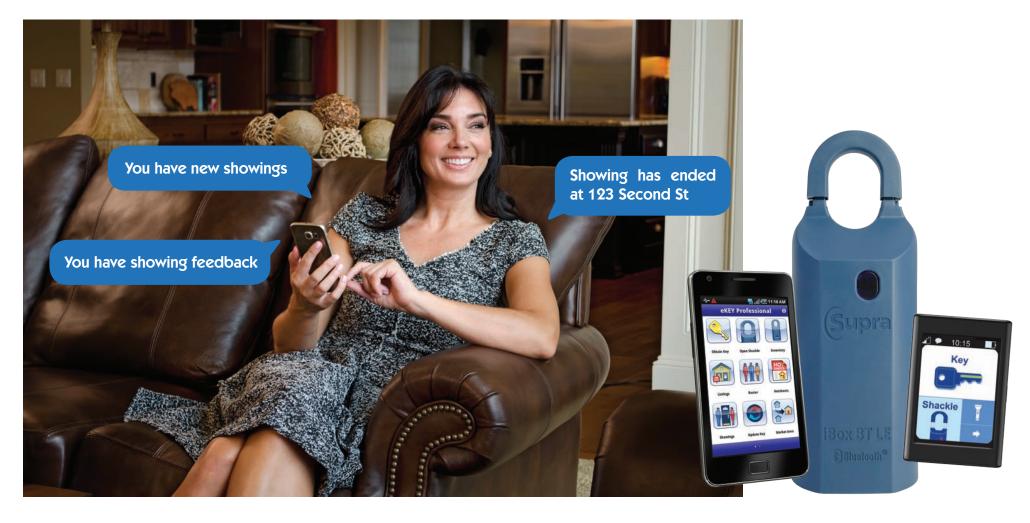
#### Recipe for AE Success

9:15 a.m. - 10:45 a.m.

#### Grand Ballroom Salon GM, Third Floor

Ryan Conrad, RCE, CAE, e-PRO, CEO, Northern Virginia Association of REALTORS®; Clint Skutchan, RCE, e-PRO, CEO, Ft. Collins Board of REALTORS®, CO

Your association, regardless of its size, can be innovative and provide great value to its members. Let Ryan and Clint help you identify actions to enhance your organizational, professional, and personal success, and how those translate into increasing the value of membership. They'll share the key leadership traits of successful AEs and how you can model those traits.



# Improve Communication with Supra's Real-time Showing Information

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#### **SUNDAY, MARCH 13**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

#### **AEI APPAREL DAY**

#### • (Don't Get) Lost in Space! 9:15 a.m. – 10:45 a.m.

#### Grand Ballroom Salon IJ, Third Floor

Facilitator: Kimberly Pontius, RCE, CAE, e-PRO, CEO, Traverse Area Association of REALTORS®, MI

Panelists: Denee Evans, CEO, Council of Multiple Listing Services, Morrisville, NC; Steve Francks, RCE, CAE, EVP, Washington Association of REALTORS®; Bob Hale, President & CEO, Houston Association of REALTORS®, TX; Rosey Koberlein, CEO, Long Companies, Phoenix, AZ; John Rosshirt, CRS, GRI, GREEN, SRES, REALTOR®, Stanberry & Associates, Austin, TX; Shelley Specchio, RCE, CEO, Northern Nevada Regional MLS Inc.; Dale Stinton, RCE, CAE, CEO, NAR

Last spring, NAR released the *D.A.N.G.E.R. Report*. What does the report mean to you, your leadership, and your association? Attend this open and frank discussion by some colleagues and industry leaders on the report's possible impact on the industry and the organization. The workshop-style format of this class will allow for small-group brainstorming so associations can develop some scenarios to address different aspects of the report.

#### How Do They Do That: Tech Weapons for Association Executives

9:15 a.m. - 10:45 a.m.

#### Grand Ballroom Salon HLK, Third Floor

Beth Ziesenis, Speaker, Author, Nerd, Avenue Z., Inc. San Diego, CA What if you could schedule a committee meeting without sending

three dozen emails to obtain everyone's availability? Or automate the little tasks that keep you from your real work? Meet some free and bargain-priced technology tools you never knew existed that will help you work more efficiently with your teams, create professional-level graphics, and wow your members.

# Association Investment Program Investment Process and Strategy 10:15 a.m. – 11:15 a.m.

#### Conference Room 9, Third Floor

Come speak to NAR-designated investment specialists about how your association can better manage its investment reserves.

# Is Your Association Prepared for the Inevitable? 11:00 a.m. – 11:45 a.m.

#### Grand Ballroom Salon GM, Third Floor

Donna Garcia, MSHR, SPHR, SHRM-SCP, SWP, RCE, Director, Association Strategic Business Planning, NAR

Whether you win the lottery, need to take an unexpected leave for medical or personal reasons, or decide to move on, who will fill your shoes when you leave? There is a key difference between "replacement" and true "succession planning." Learn the best way to plan a smooth transition, whether or not you have staff. Donna will address key areas you will need to consider prior to your exit.

#### I'm a New AE, Now What? 11:00 a.m. – 11:45 a.m.

#### Grand Ballroom Salon IJ, Third Floor

Cindy Butts, RCE, CAE, CEO, Connecticut Association of REALTORS®

The first year on the job can be a series of surprises, combined with the necessity of learning, managing, and navigating a wide range of activities and personalities. And it can be overwhelming, to say the least. Find out what you should look for, common mistakes made the first year, and resources available to you.



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NEW! REALTORS® Commercial Alliance of Southeastern North Carolina (Wilmington) NEW! Southwest Florida Commercial Alliance NEW! South Texas Commercial Assn of REALTORS® Statewide MLS of Rhode Island Rockford Area Association of REALTORS® ..... And more!

#### **SUNDAY, MARCH 13**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

#### **AEI APPAREL DAY**

#### Use Information to Make Good Decisions 11:00 a.m. – 11:45 a.m.

#### Grand Ballroom Salon HLK, Third Floor

Facilitator: Todd Carpenter, Managing Director, Data Analytics Group, NAR

Identify how data analytics can shape the future of your organization's decision-making process. Property data, smart home data, member data, even data about your staff, is piling up in your database. What are you going to do with it? Better yet, what can you do with it? This panel will share options for how to manage it and use it to your association's advantage.

#### **NAR Update Lunch**

12:00 p.m. – 1:30 p.m.

#### Grand Ballroom Salon A-F, Third Floor

Join NAR CEO Dale Stinton, RCE, CAE, for an update on NAR issues. Ask the questions you need answers to in this open forum with your peers and national counterpart.

Sponsored by: NAR Office of the CEO

#### **Association Investment Program (AIP)**

**One-on-One Session** 

1:30 p.m. - 4:00 p.m.

#### Conference Room 9, Third Floor

Want to speak individually about your association investment reserves? The AIP provides associations of all sizes access to full-service financial professionals who specialize in investing for nonprofit organizations.

#### Manage Member Expectations: The Key to a Vibrant Association

1:45 p.m. – 2:45 p.m.

#### Grand Ballroom Salon GM, Third Floor

Roger Turcotte, CBR, CDEI, DREI, GRI, Owner, Roger Turcotte and Co., LLC, Contoocook, NH

"Required" membership has its challenges. Uncover how to teach members to see the benefits of membership in a whole new light. Develop action plans customized to the needs of different member segments, and learn the difference between resources and benefits. Walk away with an action plan for new members and core members so that everyone feels invested in the association.

# Crowdsourcing: 60 Tips for AEs in 60 Minutes 1:45 p.m. – 2:45 p.m.

#### Grand Ballroom Salon IJ, Third Floor

Dave Phillips, RCE, CAE, CEO, Pennsylvania Association of REALTORS®

"Crowdsourcing" is a great way to tap our members' (and AEs') vast knowledge. Find out how to use this easy and inexpensive technique to collect and share knowledge. Walk away with dozens of new ideas for your career, your association, and your life that were all obtained through crowdsourcing. Once you understand this simple tool, you'll be ready to use it in your association to unleash your members' knowledge.

#### **SUNDAY, MARCH 13**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

#### **AEI APPAREL DAY**

• It's 11:00 p.m. – Do You Know Where Your MLS Data Is? 1:45 p.m. – 2:45 p.m.

#### Grand Ballroom Salon HLK, Third Floor

Facilitator: Bill Lublin, CRB, CRS, GRI, Managing Member, Social Media Marketing Institute, Huntingdon Valley, PA

Panelists: Matt Cohen, Chief Technologist, Clareity Consulting, Scottsdale, AZ; John Mosey, President, Northstar MLS, St. Paul, MN; Mitch Skinner, Attorney at Law, Larson Skinner PLLC, Minneapolis, MN

Your MLS produces massive amounts of information that holds tremendous value for your participants and third-party vendors. Are you doing everything you can to keep your policies and procedures current with data security, broker access needs, and usage agreements with vendors and third-party sites? This all-star panel of MLS experts will identify best practices and discuss the rise of paper brokerages; syndication agreements; data security and scraping; copyright protection and infringement; and innovative ways MLSs use data to better serve their members.

# **Snack Break** 2:45 p.m. – 3:15 p.m.

#### Grand Ballroom Foyer, Third Floor

This special snack break allows AEI attendees to visit the NAR Pavilion and become more familiar with NAR products and services.

Sponsored by: NAR Pavilion

## • No GAD? No Problem 3:15 p.m. – 4:00 p.m.

#### Grand Ballroom Salon GM, Third Floor

Bill Malkasian, Vice President, Political Strategic Planning, NAR

Advocacy isn't just a checkbox on the Core Standards Compliance Form. It's a core competency of the entire industry, and as such, a core competency of your association. Learn how to engage your elected officials, impact your community, and educate your members on the importance of advocacy. Let NAR resources show you some easy and attainable ways to develop an effective advocacy program.

#### Images and Copyright: Things to Consider When Using Imagery

3:15 p.m. – 4:00 p.m.

#### Grand Ballroom Salon IJ, Third Floor

Suzanne Weller, Senior Director, North America Sales, Getty Images, Inc.

Did you know that if you want to use images on the internet, you need permission from the owner before you copy it? While it may seem like they're yours for the taking, there are considerations to keep in mind to protect yourself. Explore the potential perils of copyright infringement via actual case studies, then learn inexpensive tips on how to build your image library and protect your association while still flexing your creative muscles.

NAR Policy 101 3:00 p.m. – 3:45 p.m.

Grand Ballroom Salon HLK, Third Floor

Rodney Gansho, RCE, Managing Director, Member Policy, Board Policy & Programs, NAR

Policy is just one of the many facets of a REALTOR® association executive's job. Is it possible to know everything about policy? Probably not. But with the tools available to you from NAR, you'll be well on your way to managing policy issues at your association. Learn about NAR's policy review process, Code of Ethics training, online resources, and other "need-to-know" information to understand this key component of REALTOR® association management.

The REALTOR® PAC Management System Credentialing Session 4:00 p.m. – 4:45 p.m.

Conference Room 7, Third Floor

RPAC Major Investor Reception

4:15 p.m. – 5:15 p.m. *Sazo's, Second Floor* 

This special reception is for RPAC major investors.

RAMCO Subscriber Implementation Meeting 4:15 p.m. – 5:15 p.m.

Grand Ballroom Salon IJ, Third Floor

Using the PAC Management System to Achieve Recognition

4:45 p.m. - 5:30 p.m.

Conference Room 7, Third Floor

#### **MONDAY, MARCH 14**

**Continental Breakfast** 

7:00 a.m. - 8:00 a.m.

Grand Ballroom Foyer, Third Floor

Sponsored by:

**RCE Overview and ADF Workshop** 

7:15 a.m. – 8:00 a.m.

Grand Ballroom Salon IJ, Third Floor

**General Session** 

8:00 a.m. - 9:00 a.m.

Grand Ballroom Salon A-F, Third Floor

Join Mark Sanborn, president of Sanborn & Associates, Inc., an idea studio dedicated to developing leaders in business and in life, as he shares with you the exciting opportunities that await you when you pursue your own potential.

#### **MONDAY, MARCH 14**

Basic Ingredients to Success

Industry Issues

Technology, MLS, & Communications

# • Neutralizing Difficult Volunteers 9:15 a.m. – 10:30 a.m.

#### Grand Ballroom Salon GM, Third Floor

Ted Mouradian, President, The 2 Percent Factor Inc., St. Catharines, Ontario, Canada

How do you attract and retain volunteers in an age when everyone has become more covetous of their time? Get to know them. Discover who your volunteers really are and why they do what they do. Uncover what motivates them to seek a leadership position. And learn strategies to handle the personality clashes that can occur when a volunteer's service goals don't necessarily advance the association's goals.

# • The Art of Serving Member Segments 9:15 a.m. – 10:30 a.m.

#### Grand Ballroom Salon IJ, Third Floor

Facilitator: Isaac Chavez, RCE, CIPS, SRES, RSPS, e-PRO, AHWD, SFR, CEO, Vermont Association of REALTORS®

Panelists: Paul Cauchi, Senior Vice President of Commercial, Miami Association of REALTORS®, FL; Stan Collins, RCE, Executive Officer, Columbus Association of REALTORS®, Columbus, OH; Janet Kane, RCE, CAE, CIPS, CEO, Southeast Valley Regional Association of REALTORS®, Mesa, AZ; Cliff Long, RCE, CIPS, Executive Officer, Birmingham Area Association of REALTORS®, Birmingham, AL; Clint Skutchan, RCE, e-PRO, CEO, Ft. Collins Board of REALTORS®, CO; Albert Tran, CIPS, e-PRO, Executive Officer, West San Gabriel Valley Association of REALTORS®, San Gabriel, CA

There are a number of member segments within the REALTOR® family, such as the property managers, commercial practitioners, YPN, global, and appraisers. Setting up member specialty groups is a great way to build new interest in your association and serve these different member segments. Watch how some associations successfully launched such groups and uncover how to model their success.

#### How to Win Big at Communication Strategies for Active Member Engagement 9:15 a.m. – 10:30 a.m.

#### Grand Ballroom Salon HLK. Third Floor

Facilitator: Andrew Sims, Communications Director, Birmingham Association of REALTORS®, AL

Panelists: Lynda Fernandez, RCE, CAE, CIPS, e-PRO, Senior Vice President of Public Relations, Miami Association of REALTORS®, FL; Kevin Juliano, e-PRO, Digital Media Manager, Pennsylvania Association of REALTORS®; Steve Klaniecki, Director of Communications & Marketing, Washington Association of REALTORS®; Jill Parker Landsman; Vice President of Communications & Media Relations; Northern Virginia Association of REALTORS®; Carol Seal, RCE, CEO, Greater Chattanooga Association of REALTORS®, Chattanooga, TN

To achieve NAR Core Standards-level communications, you need a rock-solid strategy to engage members and consumers through social media, digital, and print. Examine how to set up a successful communications campaign so you can craft the message, schedule the content, and launch the campaign. This workshop format will allow attendees to participate in roundtable strategy sessions and walk away with a successful marketing campaign template focused on calls to action, consumer advocacy, mobile friendly messaging, and more.

# Best Take-Aways of Basic Ingredients to Success 10:45 a.m. – 11:30 a.m.

Grand Ballroom Salon GM, Third Floor

#### **MONDAY, MARCH 14**

Best Take-Aways of Industry Issues 10:45 a.m. – 11:30 a.m.

Grand Ballroom Salon IJ, Third Floor

Best Take-Aways of Technology, MLS, & Communications 10:45 a.m. – 11:30 a.m.

Grand Ballroom Salon HLK, Third Floor

# REALTOR® Party Luncheon 11:45 a.m. – 1:15 p.m.

#### Grand Ballroom Salon A-F, Third Floor

As a REALTOR® association executive, you know that politics plays an important role in your members' profession. Come enjoy lunch and sharpen your political insights with a special keynote address by Howard Fineman, MSNBC political analyst and Global Editorial Director of *The Huffington Post*.

Sponsored by: REALTOR® Party

# **Legal Update** 1:30 p.m. – 2:30 p.m.

#### Grand Ballroom Salon A-F, Third Floor

Join NAR General Counsel Katie Johnson for an update on the legal issues impacting REALTOR® associations across the country.





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We wish to thank the following companies for their generous sponsorship of the 2016 AE Institute.

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Catylist is the #1 CLS (commercial listing service) for REALTOR® associations nationwide. Catylist supports RPR Commercial and offers national exposure. New in 2016: Catylist Research!

#### **CCIM Institute**

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An affiliate of the National Association of REALTORS®, CCIM Institute is home to the world's largest commercial real estate brokerage network. CCIM members are the deal makers, game changers, and go-to experts in their local markets, conducting business in 1,000 local markets in 30 countries. Along with its respected designation curriculum, CCIM Institute provides leading commercial real estate education on current trends and industry topics through its Ward Center for Real Estate Studies

#### **Centralized Showing Service**

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Centralized Showing Service has streamlined the showing appointment process to save members time and effort every day. Agents call one number to schedule appointments and use Showings.com and the CSS Mobile App, too. We provide agents the means to easily schedule and manage showing activity 24/7/365.

#### **Clareity Security**

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#### FBS-Creators of Flexmls®

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The Flexmls® system (web+mobile+IDX), created by FBS, is built on a standards-driven technology platform connecting real estate professionals to their customers with great collaboration tools that deliver timely and accurate real estate information. With exceptional support and a professional, hands-on approach to user education, the Flexmls® system is used by 160+ MLSs representing 160,000 brokers and agents. With a 30+ year history of well-scaled growth highlighted by innovation, advocacy of industry data standards and personal passion to exceed customer expectations, FBS is 100% dedicated to delivering excellence that MLSs and their members can trust.

#### Form Simplicity and Tech Helpline

7025 Augusta National Drive Orlando, FL 32822 888 784-5404 FormSimplicity.com TechHelpline.com

Form Simplicity is a paperless transaction solution available to associations and brokerages. Tech Helpline provides technical support to nearly 500,000 REALTORS® on behalf of their associations.

#### **HomeSpotter**

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HomeSpotter connects 200,000+ agents with clients and data—in the field and on their phones, with apps for brokers, agents and MLSs throughout North America.



Special 15% Discount offered to 2016 AE Institute attendees and their associates! Please use discount code: "AEI16"

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June 30, 2016

## **UPCOMING ONLINE COURSES:**

#### DIY DCF in Excel (.25) 0



This course is for commercial real estate professionals who could benefit from custom discounted cash flow analyses spreadsheets. Students will learn to build a simple yet comprehensive five-year DCF analysis model within Excel for before-tax and after-tax analysis.

Member Rate: \$165 REALTOR® Rate: \$178 Non-Member Rate: \$190 March 15 - 17

#### Creating Reliable Valuations (.25) 0/C

The commercial real estate market is in recovery, with Primary Markets showing the best performance followed by secondary and tertiary markets. In a robust market, there is substantial data from comparable sales to apply to valuation and determine benchmark numbers for cap rates, discount rates, and sales prices per square foot.

Member Rate: \$105 REALTOR® Rate: \$115 Non-Member Rate: \$125 March 16

#### Before and After Tax DCF Analysis (.25) 0

Learn to conduct a comprehensive real estate investment analysis on a before and after tax basis through this interactive online course. The course concludes with you completing a 5-year before and after tax discounted cash flow analysis on a subject property.

Member Rate: \$165 REALTOR® Rate: \$178 Non-Member Rate: \$190 March 16 - 18

# Variations, Manipulations and Extensions of the IRR Calculation (.25) 0



This course is for commercial real estate professionals who want to make better decisions using the internal rate of return calculation. The IRR calculation assumes that cash flows are annual and occur at the end of each year, but that is not always the case in the real world.

Member Rate: \$165 REALTOR® Rate: \$178 Non-member Rate: \$190 March 22 - 24

#### Essential HP 10bll Financial Calculator Skills for CRE (.25) 0

Do you favor the HP 10bii Financial Calculator? This two-hour online course provides commercial real estate professionals with essential skills needed to proficiently use the calculator for business.

Member Rate: \$105 REALTOR® Rate: \$115 Non-member Rate: \$125 March 28

#### 1031Tax Deferred Exchange (.25) 0



This advanced course provides a concise and thorough overview of Internal Revenue Code Section 1031 tax-deferred exchanges.

Member Rate: \$105 REALTOR® Rate: \$115 Non-member Rate: \$125 March 29

#### **Register Now! Classes are filling up!**

VISIT WWW.CCIM.COM/AEI16 TO VIEW THE COMPLETE SCHEDULE AND TO REGISTER OR CALL (800) 621-7027, OPTION 2.



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Membership Director by MMSI. Membership Director is the most intuitive, accurate, and customizable membership and accounting system specifically focused on REALTOR® associations and MLSs, on-site or in the cloud. Celebrating 30 years of providing the best customer service. Don't compromise; customize.

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Visit the NAR Resource Table in the Grand Ballroom Foyer to learn about the latest tools and resources from NAR to help you communicate the value of membership! This is the place to find out how many of your members are taking advantage of the Member Value Plus (MVP) program, and purchase publications for you and your members and save 10%, including the just updated 2016 Association Resource Packet and more available through the REALTOR® Store. Learn about NAR's Orientation resources for Associations, including the Online Orientation National Module. Get a .REALTOR web address for your Association, find out how many of your members have gotten a .REALTOR domain for their business, and the .REALTOR contest launching this summer. And see how easy it is to make a difference in your community by getting involved at your local Boys & Girls Club.

#### NATIONAL ASSOCIATION OF REALTORS® Commercial Group

430 North Michigan Avenue Chicago, IL 60611 800 874-6500

www.REALTOR.org/Commercial

Visit with the NAR Commercial Team to learn more about best practices and resources including the Commercial Services Accreditation and the Commercial Innovation Grant program that help you deliver strong services to your membership. Pick up information about NAR's affiliated commercial real estate organizations-CCIM Institute, Counselors of Real Estate, IREM, RLI and SIOR. Our goal is to help association leaders through the development of advocacy, technology, research and enrichment offerings that foster the growth and success of members.

#### nSight Marketing, Inc.

8100 High Drive Leawood, KS 66206 913 220-7753 www.nSightMarketing.com

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We work with NAR association executives to convey the clear and simple answer to "so what?" about membership, using systematic approaches that produce results.

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www.realtor.com

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#### The REALTOR® Party

500 New Jersey Avenue, NW Washington, DC 20001 202 383-1000

www.REALTORACTIONCENTER.com

The REALTOR® Party is a powerful alliance of REALTORS® and REALTOR® associations working to protect and promote homeownership and property investment. The REALTOR® Party speaks with one voice to advance candidates and public policies that build strong communities and promote a vibrant business environment. REALTOR® Party resources are available for you to use for your association to achieve the core standards requirements in advocacy and consumer outreach. From RPAC fundraising grants, through community outreach programs, with member involvement resources and campaign services, the REALTOR® Party is the key for your association to be the advocacy voice.

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#### San Antonio Board of REALTORS®

9110 W IH 10 Suite 1 San Antonio, TX 78230-3112 210 593-1200 www.sabor.com

The San Antonio Board of REALTORS® is the largest professional trade association in the San Antonio and surrounding areas, representing over 9,500 REALTOR® members across nine counties. SABOR provides its members with the education and services they need to excel in their businesses, enhance the REALTOR® image In the community and protect the private property rights of the clients they serve.

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P.O. Box 8709 Greensboro, NC 27419 800 367-8756 www.seisystems.com

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#### Texas Association of REALTORS®

1115 San Jacinto Blvd. Suite 200 Austin, TX 78701-1906

(waiting on phone, web site & description)

#### Training4RE.com

430 North Michigan Avenue Chicago, IL 60611 312 329-8488 www.training4RE.com

Developed exclusively for REBAC course providers, training4RE.com serves as the online resource for real estate professionals looking for NAR designation or certification courses in their area.

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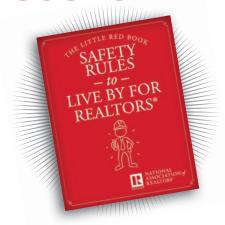
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to find out how many of your members are MVPs and we'll give you a **FREE** copy of *The Little* Red Book: Safety Rules to Live By for REALTORS®.

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