



# Appraisal News



## Northern California Chapter of the Appraisal Institute

### Join Us for Installation 2000!

You are invited to join us for a fabulous Installation Celebration on Saturday, January 22. The extravaganza will be held at the beautiful Crow Canyon Country Club. The evening will be filled with music (by DJ Dave Snitcker), great food & spirits, plus the company of new and old acquaintances. Plan to show your support for 2000 President Roland Burchard, MAI, and all of the 2000 Leadership Team. 1999 Region I Chair Allen Safer, MAI, will be in attendance to officiate. Advanced reservations required by January 7. It won't be a celebration without you!



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### Roland Burchard, MAI



### President's Message

### A Theme for The New Year

Greetings! I hope that you are enjoying the New Year without any Y2K problems. I first want to thank you all for the honor and privilege it is for me to serve as your President for 2000 in one of the best AI chapters in the nation. I am excited about what is coming up for our chapter in the new year. We have one year under our belt as a merged group and Central California officially joined us January 1. A special welcome is extended to all members of the Central California Chapter.

Going into this year, I believe the theme for the chapter should be "Growth through Professionalism and Service". My threefold vision for the chapter is to:

- increase designated membership
- continue to serve our chapter through quality courses and interesting seminars
- encourage professional and social interaction at all chapter functions

I have a real sense of the need to encourage our associates to get their designations. I personally know of many professional appraisers who have only to finish their demonstration reports, take the comprehensive examination, and get their final hours of work experience to complete their requirements. Many of

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### January HUB Workshop & Dinner Meeting

Thursday, January 20, 2000

**Location:** Pleasanton Hilton  
7050 Johnson Drive  
(near I-680 & I-580)

**Directions:** 925/463-8000

**Parking:** Ample and free

**Workshop:** 4:00pm — 6:00pm

**Topic:** *Real Estate Development from Concept to Reality — Where do Appraisers Fit In?*

**Social:** 6:00pm

**Dinner:** 7:00pm

**Topic:** *OREA: What to Expect In The New Millennium*

**Presenters:** Jerry Jolly, Director, OREA, & Other OREA Staff Members

**Price:** AI Members Non-Members

**Workshop Only:** \$ 37 \$ 42

**Dinner Only:** \$ 37 \$ 42

**Both:** \$ 37 \$ 42

#### Reservations & Payment:

Advanced reservations are required to ensure adequate seating and workshop materials. Simply fax a completed copy of the address portion of this newsletter to the Chapter Office at 415/398-4259 by Monday, January 17. Please indicate the names of any guests that you might be bringing as well as your preferred dinner selection: Rosemary Chicken or Baked Snapper Etouffee. Cancellations without penalty must be received by noon on Monday, January 17. Cancellations received after noon on January 17, and "no-shows" will be charged unless we are able to re-sell your reservation. Reservations received after the cut-off date and walk-ins cannot be guaranteed. Payment will be collected at the door. We reserve the right to substitute speakers under circumstances beyond our control.

#### About the Workshop:

#### Real Estate Development from Concept to Reality — Where do Appraisers Fit In?

City Planners from around the San Francisco Bay Area will discuss real estate development from their point of view — specifically, how to move a development plan from concept to reality. Each will be asked to provide at least one "case study" example of a recent development project within their jurisdiction, and to discuss the development process associated with it. Attendees will be given the

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## President

from front page

you at this point have been there too many years. Some of you are as good and just as experienced as the designated people we all know. So, really you owe it to yourselves to give yourself the gift of time to finish. You will never regret the effort to finish the race you began long ago. The professional and emotional benefits of achieving your designation far outweigh the cost in time and effort. By the way, do not miss the special Associates' Guidance program scheduled for February 9 at the Pleasant Hill Community Center.

Along these lines, I want to encourage the existing designated members to actively encourage the associates you employ, know, and will meet this year, to finish the race. At upcoming courses, seminars and Subchapter/HUB meetings, bring these associates. Reacquaint them with networking and the benefits of designation. Take more time to attend the HUB and Subchapter Meetings and have some fun getting to know new people and checking in with old friends and acquaintances.

To encourage more of this interaction at Chapter events, we are going with a less is more approach — fewer meetings. HUB and Subchapter Meetings will be held on the third Thursday of each month. So, every third Thursday, there will be a HUB or Subchapter Meeting that you can attend to meet with friends, hear interesting speakers, and receive CE credit.

This year is shaping up nicely. People are stepping up to volunteer for the different Committee Chairs, but they need helpers who can share their time and talents. I am heartened to see so many who feel, as many of you do, that it is important to give something back to the appraisal profession that has given us very rewarding careers. There is honor in service and there are benefits of ser-

vice. Please contact the Chairs listed below to offer your assistance:

### 2000 Northern California Chapter Committee Chairs

#### ARRANGEMENTS

Chris Bell  
707/569-1755  
CABell@Sonic.net

#### ASSOCIATES' GUIDANCE — GENERAL

Jeff Fillmore, MAI  
408/241-4400

#### ASSOCIATES' GUIDANCE —

##### RESIDENTIAL

Bruce Hahn, SRA  
925/855-4950  
bhahn@ricochet.net

#### FALL CONFERENCE

Kurt Reitman, MAI  
650/843-0740  
reitman@slip.net

#### MONTEREY BAY SEMINAR

Martha Renard, SRA  
831/484-9109  
MRe9075714@aol.com

#### COURSES

Jeff Enright, MAI  
408/535-0900  
jenright@msn.com

#### SEMINARS

Claudia Carleton  
408/279-1520  
claudia@hulberg.com

#### WORKSHOP/PROGRAMS

Jan Woolsey, MAI  
415/705-7525  
jan.woolsey@uboc.com

#### EXAMINATIONS

John Merget, MAI  
510/577-8079  
john.merget@uboc.com

#### EXPERIENCE REVIEW — GENERAL

Ken Matlin, MAI  
408/436-5500

#### EXPERIENCE REVIEW — RESIDENTIAL

Deena Love, SRA  
510/528-1588

#### GOVERNMENT RELATIONS

Kurt Reitman, MAI  
650/843-0740  
reitman@slip.net

#### NEWSLETTER

Sean O'Reilly, SRA  
415/788-7722  
sean7@hooked.net

#### TECHNOLOGY

Mike Herwood, SRA  
925/254-2553  
herwood@aol.com

#### PUBLIC/COMMUNITY RELATIONS

Janis Lassner, SRA  
408/279-1520  
janis@hulberg.com

#### EAST BAY SUBCHAPTER

Bruce Hahn, SRA  
925/855-4950  
bhahn@ricochet.net

#### SILICON VALLEY SUBCHAPTER

Bill Range  
510/790-3377  
range@landmarkappraisal.com

#### MONTEREY BAY SUBCHAPTER

Pam Brown, SRA  
831/772-0456

#### CENTRAL CAL SUBCHAPTER

Scot Fipps, MAI  
559/222-1669

#### NORTH BAY SUBCHAPTER

Siobhan Stoddard, MAI  
415/472-7833

#### GOLDEN GATE SUBCHAPTER

Joe Napoliello  
415/986-3454  
itsnappy@pacbell.net

#### SIERRA SUBCHAPTER

John Hillas, SRA  
209/569-0450  
jhillas@aol.com

#### LDAC (LEADERSHIP DEVELOPMENT & ADVISORY COUNCIL)

Jan Kleczewski, MAI  
415/391-6155  
jan\_kleczewski@gmaccm.com

#### NOMINATING

Dawn Molitor, SRA  
925/254-7238  
dmolitor1@hotmail.com

#### FINANCE

Karen Mann, SRA  
510/790-2345  
karen@mannappraisal.com

I want to thank all of the above Chairs for the time and talents that they will be sharing with the Chapter throughout the year.

Service to our members is a calling and I am calling you. Some can give back mass quantities of time, some can give only sporadically. But, we are all a team and as a team member, I ask you to volunteer and help with chapter functions. Even if you cannot volunteer, consider giving back by attending Chapter functions such as HUB/Subchapter Meetings (and remember to bring an associate). Your encouragement and support of the Chapter's leadership team means a great deal to them and the organization.

Change is constant in our industry and serving our members is a big job.

## Hello, Newly Designated Members!

New members are reminded to send their "Member Profile" to the Newsletter Editor, c/o Sean O'Reilly, SRA, Hamilton-Ricci & Associates, 930 Montgomery Street, Suite 300, San Francisco, CA 94133, upon notification of receiving your designation. All profiles should be submitted on disk. In addition, a professional quality black and white, wallet-sized photo should accompany your submission.

All profiles are printed on a first come, first printed basis. Isn't it time that you are recognized for your achievement? Submit your profile today!

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## President

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Serving our members requires a lot of travel and coordination on part of paid staff and volunteers. To better serve our members from a more central and accessible location, we are looking to move the Chapter Office to Walnut Creek. Nothing is firm as of the writing of this address, but expect a formal announcement soon.

While this open letter to the members mostly addresses my themes, hopes, and vision for 2000 there is one piece of business detail I need to discuss, and that is Chapter dues. As a group, the leadership of the pre-merged chapters set dues at \$100 for 1999, which was substantially lower than the former San Francisco Chapter's dues required to run what was then a large chapter. It was well understood that this lower level of dues would not sustain the level of service our members required in the long run.

Well, our experience in 1999, and our projections for 2000, required the Board of Directors to approve a dues increase to \$150 for designated and associate members. With a unanimous vote, the Directors are confident that this modest increase is required to sustain the quality of service our members have come to appreciate and expect.

After going to Chicago in December, it is more apparent to me that National is being pro-active in developing initiatives, products and directions to help the membership in a changing appraisal environment.

My hope for us a chapter is that with your help, attendance and interactions at our local programs, 2000 can be our best year ever!

## Members in The News

**Arlen C. Mills, MAI, SRA**, has been appointed to a three-year term on The Appraisal Foundation's Appraisal Qualifications Board. In addition, Mills will serve as the 2000 AQB Chair. Congratulations, Arlen!

**Stephanie Coleman, MAI, SRA**, has been named the new Director of Screening for the Appraisal Institute. Coleman's appointment was approved by the AI Board of Directors at their December 1999 Meeting in Chicago. She will replace Kendall Thurston, MAI, and continue the valuable service of providing advice to members on professional practice problems. Congratulations, Stephanie!

Appreciation is extended to the following members who assisted with registration at the nine courses and seminars offered in late October and November: **Patty Feikert, SRA, Paul Erickson, Nancy Genasci, Marol Connelly, Virginia Swanberg, SRA, Charmaine Cheuk, Pete Iversen, SRA, Jeff Jensen, SRA, Chris Bell, and Claudia Carleton.**

A special note of thanks is extended to **John Merget, MAI**, who proctored a special challenge exam in December in an effort to help our associate members become designated.

## Are You Connected?

The Chapter has a group e-mail that allows only members of the Northern California Chapter to exchange information at the click of a button.

This is a great way to hear about newly scheduled education offerings, to find comparables or an answer to an appraisal-related question.

If you would like to get connected, send an e-mail to [Lisa@NorCal-AI.org](mailto:Lisa@NorCal-AI.org).

## Members On the Move

**Keith D. Hardy, MAI, SRA**

9057 Soquel Drive, Building C, #A  
Aptos, CA 95003  
831/662-0173 FAX 831/662-0182  
[Keith.Hardy4@GTE.NET](mailto:Keith.Hardy4@GTE.NET)

**Dawn Molitor, SRA**

89 Underhill Road  
Orinda, CA 94563  
925/254-7238 FAX 925/253-0932  
e-mail: [dmolitor1@hotmail.com](mailto:dmolitor1@hotmail.com)

**Scott Rurik, MAI**

2416 W. Shaw Avenue, Suite 101  
Fresno, CA 93711  
559/322-8135 FAX 559/226-8130  
[ser@scottappraisal.com](mailto:ser@scottappraisal.com)

**Jeff Schwartz, MAI**

Credit Swisse First Boston Limited  
One Cabot Square  
London, e14 4qj  
011 44 171 888 4692  
FAX 011 44 171 888 4699  
[jeff.schwartz@csfb.com](mailto:jeff.schwartz@csfb.com)

## Notice of Correction

### IMPORTANT: OREA INFO

An error was made in an *OREA News* item that appeared in the Fall/Winter edition of *The California Appraiser* concerning temporary practice permits and reciprocity. The organization that actually proposed national standard forms for Temporary Practice Permits and Consent to Service of Process was the Association of Appraiser Regulatory Officials. The article should read as follows:

OREA has recently completed a set of changes to its regulations regarding temporary practice permits and reciprocity. These changes will allow standard forms currently being proposed by the Association of Appraiser Regulatory Officials to be used by applicants who are not residents of California and who are applying for temporary practice permits to work in California, allow standard Consent to Service of Process forms currently being proposed by the Association of Appraiser Regulatory Officials to be used by applicants who are not residents of California and who are applying for licenses or temporary practices to work in California, and will allow OREA to enter into reciprocal agreements with other states so that it will be able to issue licenses without additional testing of real estate appraisers who hold licenses in other states. The changes to OREA's regulations have an effective date of December 2, 1999 and are available on OREA's website — [www.orea.ca.gov](http://www.orea.ca.gov). Please refer to Sections 3525, 3526 and 3569.

*OREA sincerely apologizes for any inconvenience this may have caused readers.*

*For more OREA information, see page 7*

## 2000 Subchapter Leadership Named

### EAST BAY

Bruce Hahn, SRA — Chair  
Greg Rinehart — Vice Chair

### SILICON VALLEY

Bill Range — Chair  
John Kirby — Vice Chair

### MONTEREY BAY

Pam Brown, SRA — Chair  
Steve Gile — Vice Chair

### CENTRAL CAL

Scot Fipps, MAI — Chair  
Tom Austin, MAI — Vice Chair

### NORTH BAY

Siobhan Stoddard, MAI — Chair  
Dana Burwell, MAI — Vice Chair

### GOLDEN GATE

Joe Napoliello — Chair  
Lori Horn, SRA — Vice Chair

### SIERRA

John Hillas, SRA  
Bill Bambas, MAI

# National President Responds to Cushman Collaboration Concerns

In recent weeks a number of members have raised questions regarding our collaboration with Cushman & Wakefield in the publication of that firm's bulletin, *Real Estate Outlook*. This letter will address those concerns and highlight our rationale for such ventures.

First of all, I assure you that a decision to pursue any collaboration or alliance is made on the basis that it is in the best interests and promotes all of our members. In today's marketplace one of the ways we can best serve our members is to foster new business opportunities. In fact, one of the stated goals of our long-range plan approved by the Board of Directors is "To create new and unique opportunities and benefits for our members." We are taking action to build client awareness of the Appraisal Institute and our members through this effort and others.

The concept of "co-branding" a publication was explored by the Communications Committee and then approved by the Board of Directors. Our intent in working with C&W on *Real Estate Outlook* is to reinforce and continue the preeminence of the Appraisal Institute members in key markets. With our messages within the publication and our logo on the cover, our organization and our members gain more visibility with the investment public. We are reaching approximately 10,000 highly placed real estate investors and other potential clients of our members. Because of the broad distribution of *Real Estate Outlook*, it stimulates more opportunities for members at large. Recipients of *Real Estate Outlook* are directed to contact the Appraisal Institute for our Directory of Designated Members and pointed to our web site for more information. Other professional organizations have had long-time affiliations of this type, and their members reap the ben-

efits of exposure to similarly broad markets. These include the Counselors of Real Estate, which co-sponsors a quarterly real estate report with Real Estate Research Corp., and the Commercial Investment Real Estate Institute, an affiliate of the National Association of Realtors, which co-brands a quarterly investment trends report with Landauer Associates, Inc. Furthermore, we are not "endorsing" Cushman & Wakefield with this arrangement nor have we established an exclusive relationship with the firm. In fact, our agreement does not extend any rights to C&W to use our logo for any other purpose.

Finally, it should be kept in mind that *Real Estate Outlook* in itself is an excellent resource for appraisers, and we are currently test-marketing distribution of the publication to our own *MarketSource* subscribers to determine future, more extensive distribution throughout the association. The reaction from *MarketSource* subscribers has been positive as they see the value of the information provided in both publications. A broader ambition would be to produce materials similar to *Real Estate Outlook* independently for use by members in publishing their own localized reports to respective clients. To that end our exciting new database projects will be a rich resource for information. These are exciting times for our association and our members. Our guiding motivation remains the best interests of our entire membership. I look forward to working for the betterment of us all.

— Bert Thornton, MAI

1999 National, Appraisal Institute President

## Attention All Members: Keep Us Posted

Sometimes the Chapter Office hears through the grapevine that our members have moved, but we would like to read it officially from you! If you have recently moved, received a new phone, fax or e-mail, please submit your updated information *in writing* to the Chapter Office. Your assistance in helping us keep your mailing and phone information up-to-date is greatly appreciated, plus it allows us to help others get in touch with you. When making an address change, please indicate if the update represents your business or home address and whether it is your preferred mailing address.

# HUB

from front page

opportunity to ask questions of the speakers relating to recent (and pending) development, and will be instructed on the best time for appraisers to get involved in the process.

Bring your colleagues, problems, and issues and prepare for a lively 2-hour program!

All workshop attendees are encouraged to stay for the no-host social and dinner immediately following the workshop. Applications for 2-hours of AI, OREA and SBE CEC will be submitted. Attendees seeking CE must arrive by the 4:00pm start time.

Partial credit is not available.

### About the Dinner Topic

The subject of the dinner program will be "OREA: What to Expect in the New Millennium." Jerry Jolly, Director, OREA, and an OREA staff appraiser will address and highlight some of the recent regulatory changes impacting appraisers, and will update the audience on the status of appraiser referrals in California.

## Update Your Library

The Chapter Office has a limited number of copies of the Institute's 1999 Standards of Professional Appraisal Practice. If you are a chapter member and would like to add a copy to your library, please send a check payable to Appraisal Institute to the Chapter Office for \$4 to cover postage and handling.



### Surfin' On the Net

NORTHERN CALIFORNIA CHAPTER OF AI

<http://www.NorCal-AI.org>

APPRAISAL INSTITUTE (CHICAGO)

<http://www.appraisalinstitute.org>

THE APPRAISAL FOUNDATION

<http://www.appraisalfoundation.org>

FANNIE MAE

<http://www.FannieMae.com>

OFFICE OF REAL ESTATE APPRAISERS

<http://www.orea.ca.gov>

<http://www.orea.cahwnet.gov>

DEPARTMENT OF HOUSING & URBAN

DEVELOPMENT (HUD)

<http://hud.gov>

THE APPRAISAL SUBCOMMITTEE

<http://www.asc.gov>

If you have located an informative site for appraisal information, please notify the Chapter Office so we can expand this growing list of on-line information sources.

### Deadlines & Guidelines

The newsletter submission deadline is noon on the 5th of the preceding month. All submissions for the February 2000 issue must be received by noon on January 5.

We reserve the right to reject or edit classified ads. Ads are limited to 40 words. A \$40 publishing fee must accompany submission from non-affiliates. Advertising is complimentary for AI members and affiliates. Ads will be printed on a space available basis. The Appraisal Institute assumes no responsibility for the reliability of ads other than to publish them.

## Real Estate Fraud And the Appraiser's Role

Friday, January 21  
Pleasanton Hilton

Real Estate fraud has become widespread and pervasive. The OREA is now cooperating with District Attorneys in prosecuting appraisers, as if they were perpetrators or accomplices. This one-day seminar will provide you with an enlightening presentation of case studies, litigation decisions and current live cases involving fraud. In each instance, the appraisers involved were placed in a liability situation. Were they willing participants or simply duped and used like pawns? Find out how to avoid such liability for yourself, by identifying a fraud transaction before you appraise it or lend on it!

The seminar author and lead instructor will be Steven R. Smith, MAI, SRA, who was the expert in the Soderberg vs. McKinney case who testified on standards of care and the use of good appraisal procedures. His recently published OREA article *Appraiser Liability, There Ought to Be a Law*, has stirred interest among appraisers who are concerned for their future. The article was a condensation of a larger research paper written for a graduate class project, which will be included in its entirety in the seminar workbook.

Other guest speakers include John Brennan, Head of Enforcement, OREA, Greg Harding, Sr. Investigator, OREA, and William Denny, Head, Consumer Fraud Unit, District Attorney's Office, Alameda County.

This program has been approved for 7-hours of OREA CEC (#97754C557). An application for 7-hours of Appraisal Institute CEC has been submitted. Tuition fee includes seminar workbook, refreshments and lunch; \$150 for Appraisal Institute Members / \$190 for Non-members.

For registration information contact the Chapter Office at 415/398-2876.

### AI Director of Screening

Stephane Coleman, MAI, SRA  
209/551-0735  
1-877/777-6939

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## A Look at 2000 Educational Offerings

Real Estate Fraud and the Appraiser's Role Seminar January 21

Instructor: Steven R. Smith, MAI, SRA & Panelists  
Location: Pleasanton Hilton, Pleasanton  
Tuition: \$150 Appraisal Institute Members  
\$190 Non-Members

Course 550: Advanced Applications January 31 - February 5

Instructors: Nelson Bowes, MAI & Virginia Messick, MAI  
Location: Monarch Hotel, Dublin  
Tuition: \$650 Appraisal Institute Members  
\$750 Non-Members

Course 710: Condemnation Appraising — Basic March 22 - 23

Instructors: Steve Roach, MAI, and Bob Jones, MAI  
Location: Sunnyvale Hilton

Course 720: Condemnation Appraising — Advanced March 24 - 25

Instructors: Steve Roach, MAI, and Bob Jones, MAI  
Location: Sunnyvale Hilton

Courses 410/420: Standards of Professional Practice March 30 - April 1

Instructors: Stephanie Coleman, MAI, SRA, and Dawn Molitor, SRA  
Location: Petaluma Community Center

Course 110: Appraisal Principles April TBA

### Additional Courses & Seminars Planned for 2000

Vineyard Valuation Seminar

Litigation Marketing Seminar

USPAP Update Seminar

Federal and State Laws & Regulations Workshop

Going Concern Seminar

Litigation Right of Ways: Porterville Case Law Seminar

Timberland Seminar

Course 120: Appraisal Procedures

Course 310: Basic Income Capitalization

Course 510: Advanced Income Capitalization

Course 430: Standards of Professional Practice - Part C

Course 520: Highest and Best Use

Course 700: The Appraiser as an Expert Witness

Course 705: Litigation Appraising: Specialized Topics and Applications

*To receive advanced notification of these upcoming course offerings, contact the Chapter Office at 415/398-2876.*

*We reserve the right to cancel or substitute dates, locations and/or instructors as necessary. Interested attendees are encouraged to register at least 37 days prior to the offering to help avoid possible cancellation.*

## AI Tuition Scholarships Available

Region I is pleased to once again offer Minority Scholarships for those who meet the eligibility requirements listed below:

- ▶ applicants must be minorities/women
- ▶ applicants must be a Region I Associate/Affiliate
- ▶ applicants must be an Associate/Affiliate in good standing (including payment of current year dues)
- ▶ applicants must have no ethics violations

Contact the Chapter Office at 415/398-2876 for an application and specific criteria. All applications must be returned by January 31, 2000.

Northern California Chapter of the Appraisal Institute Proudly Presents

**Associate Members Guidance Workshop**  
**Wednesday, February 9, 2000 – Pleasant Hill Community Center**  
**320 Civic Drive (off Taylor Boulevard), Pleasant Hill**

Registration 8:30am      Workshop Hours 9am – 4pm      Lunch 12:00      Refreshments Provided

Your Chapter Membership & Retention Committee will be providing an *outstanding* program for the Chapter Associate Membership on Wednesday, February 9. The following is a simplified agenda to tantalize and get you motivated to attend and be prepared to be informed, participate, and move you forward in your designation pursuit.

The Chapter's Guidance and Experience Review Chairs and various Committee members of both will be in attendance to coordinate the program, as well as Chapter Associate members and recent Chapter Designated members who will provide you with information and insight from their own experiences. Representatives from the National AI Guidance Program, Experience Review, and Demonstration Grader Committees will attend to give you a clear understanding of the designation requirements, define the terms, discuss the 'streamlined' changes to assessing work experience, as well as convey the 'secrets' to a passing demo.

- Morning Session - 9am to Noon

Designation Requirements – "Paths"

Robert (Bob) Lyman, an SRA Associate, and Chair of the Associate Committee for the Greater Boston Chapter of the AI will provide us with a clear discussion of the designation 'paths,' and their deadlines, or requirement changes – "Work from the facts, not assumptions."

Experience Review – "Take the Scarieness out of the Process"

Deena Love, SRA and Ken Matlin, MAI – Chairs of the Chapter Experience Review Committees will discuss the Experience Review process, help you prepare and sooth your fears. Committee members and Associate and recently Designated Members will discuss their own experiences, as well as provide a mock Experience Review Assessment meeting to aid in helping to understand what you can expect.

- Lunch (provided) - Noon
- Afternoon Session- 1pm to 4pm

Chapter Associate Committee

Bob Lyman will discuss the benefits of having an *Associate Committee*, both to the Chapter and the Associate membership. Thanks to Bob, and his 'team' of Associates the Greater Boston Chapter, has a success story worth reveling about – we could do it too!

Demonstration Report – "Hear the Secrets"

Bruce Hahn, SRA and Jeffrey Fillmore, MAI - Chairs of the Chapter Guidance Committee, with Demonstration Graders will discuss the common reasons for Demo failures, how to use the Grader Sheet to make the process simpler, and the 'secrets' of writing a passing demo – the first time! Recent Designated Members, and Associates who have successfully completed their Demos will discuss their own experiences, pitfalls, and what they would do.

Mark February 9, on your calendar and **do not** miss a great opportunity to hear everything you have always wanted to know about getting your designation and were afraid to ask - FREE! Space is limited to the first 60 NorCal Associates who register!

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**2000 ASSOCIATE GUIDANCE WORKSHOP REGISTRATION FORM - FEBRUARY 9, 2000**

Name \_\_\_\_\_

Firm Name \_\_\_\_\_ Bus Phone \_\_\_\_\_ / \_\_\_\_\_ FAX \_\_\_\_\_ / \_\_\_\_\_

Business Address \_\_\_\_\_

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

e-mail \_\_\_\_\_

I am pursuing the:  MAI designation  SRA designation

Remit to Appraisal Institute, 110 Sutter Street, Suite 1010, San Francisco, CA 94104 or FAX 415/398-4259

# Agenda for Associate Members

## Comprehensive Appraisal Workshop Comes to Northern California

The clock is ticking and many General Associates are scrambling to meet December 2000 deadlines to obtain the MAI designation. If you are one of these associates, be sure to save February 10-13 to attend Ted Whitmer's Comprehensive Appraisal Workshop. Whitmer has changed the format slightly so it is now a 3-day offering which allows time for travel and instruction on both the 10<sup>th</sup> and the 13<sup>th</sup>. However, this new format requires work to be done before the student comes to the workshop. The Northern California offering will be held at the Learning Exchange in Sacramento. Materials will be sent prior to the first day of instruction.

For registration information contact the Comprehensive Appraisal Workshop at 409/764-2667 or: tedwhitmer@earthlink.net.

## Associates On The Move

### Russell A. Peterson

Luther Burbank Savings  
1050 Fourth Street  
San Rafael, CA 94901  
415/257-3706 FAX 415/457-4919  
rpeterson@lbsavings.com

### Arthur J. Troy

California Federal Bank  
135 Main Street, 5<sup>th</sup> Floor  
San Francisco, CA 94105  
415/904-4648 FAX 415/904-4623  
atroy@calfed.com

## Coming Soon: Free Library Service

The Lum Library has begun work on a section of its public access catalog that will offer Appraisal Institute members access to full-text, fully searchable articles of *The Appraisal Journal*.

The free service will be available in the next few months.



## Who Ya Goin' To Call?

Need help understanding the requirements for designation or a little nudge to get your demo started? Confused about all of the changes that have occurred since you became an associate member? Fear no more! Contact the following Associates' Guidance Chairs for assistance:

### GENERAL ASSOCIATES' GUIDANCE

**Jeff Fillmore, MAI**  
408/241-4400  
**David Hardy, MAI**  
408/241-4400

### RESIDENTIAL ASSOCIATES' GUIDANCE

**Bruce Hahn, SRA**  
925/855-4950  
bhahn@ricochet.net  
**James Marbry, SRA**  
800/657-2400 x237

In addition, feel free to contact the Member Services Department at the National Office. The professionals who staff this department, are experts in helping to determine your needs and can help put you on the path toward designation.

### COMPREHENSIVE EXAM

**Rebecca Hiddle**  
312/335-4190

**Katie Laughlin**  
or 312/335-4187

### ASSOCIATE RECORDS

**Dorothy Williams**  
312/335-4172

### EXPERIENCE REVIEW

**Marilyn Moore**  
312/335-4173  
**Harriet Kudlacik**  
312/335-4157

### STATUS/DEMO REPORTS

**Jim Jones**  
312/335-4191

**Sonja Mann**  
312/335-4177

**Margaret Latimore**  
312/335-4174



## Impact of AB 431

**SUMMARY:** The passage of AB 431 provides some significant licensing changes at OREA to include increased fees and shorter licensing periods. The bill also abolishes the 4-hour State Laws & Regulations continuing education course requirement and requires OREA to reduce their operating budget by \$500,000 beginning in the 2000/01 fiscal year. In real dollars, total fees for Certified Appraisers are increasing from \$209 to \$305 per year, and fees for Licensed Appraisers are increasing from \$184 to \$268 per year. Annual figures are presented as the licensing period is decreasing from 4 to 2 years thereby complicating a comparison of total fees required at application. While the licensing period will be decreased to 2 years, the Continuing Education requirements will remain on a 4-year cycle. Therefore, only every other renewal application will require a Continuing Education submission. For a detailed description of OREA's new law, check out their web site at <http://www.orea.ca.gov>.

**TRANSITION PERIOD AND ELIGIBILITY:** OREA's new law resulting from AB 431 does not technically take effect until January 1, 2000. Therefore, there is a Transition Period from now until the end of the year which requires explanation. To begin, it must be emphasized that you cannot submit a renewal application to OREA more than 6 months prior to the expiration date of your license. As such, only licenses with expiration dates prior to July 1, 2000 fall into this category.

Licenses expiring on or after July 1, 2000 automatically fall under the new law.

**TRANSITION PERIOD CLARIFICATION:** If your license expires between 1/1/2000 and 6/30/2000, you can submit a renewal application prior to January 1, 2000 and OREA will process the application under current law. That is to say, you qualify for the existing fee structure and a 4-year licensing period. However, if you take this route, the 4-hour State Laws & Regulations continuing education course will still be required (remember, OREA's new law does not take effect until 1/1/2000). It is emphasized that only applications received before 1/1/2000 will be processed under OREA's current law (assuming the license expiration is prior to 7/1/2000). Applications received after 1/1/2000 will fall under the new law.

**STATE LAWS & REGULATIONS REQUIREMENT:** As previously noted, OREA's current 4-hour State Laws & Regulations continuing education course requirement will no longer be a requirement on renewal applications received after 1/1/2000.

However, while the course itself will not be required, licensee's will still have to sign an affidavit certifying that they have read and understand the Federal and State laws and regulations pertaining to real estate appraisers. The reading material for this requirement can be found on OREA's Web site.

— Prepared by Dave Kalemba

## Looking Ahead

Jan 20	Board Meeting — Pleasanton
Jan 20	HUB Workshop/Meeting — Pleasanton
Jan 21	Fraud Seminar — Pleasanton
Jan 31- Feb 5	Course 550 — Dublin
Feb 17	Golden Gate Subchapter — San Francisco
March 16	Silicon Valley Subchapter — San Jose
March 17	Seminar – TBA — South Bay
March 22-23	Course 710 — Sunnyvale
March 24-25	Course 720 — Sunnyvale
March 30 - April 1	Courses 410/420 — Petaluma
April	Course 110 — TBA
April 13	North Bay Subchapter — Santa Rosa
April 14	Vineyard Valuation — Wine Country

## 2000 Chapter Officers

### PRESIDENT

**Roland H. Burchard, MAI**  
Roland H. Burchard & Associates  
1350 Treat Boulevard, Suite 280  
Walnut Creek, CA 94596  
925/935-9200 FAX 925/935-3095  
e-mail: burchard@pacbell.net

### VICE PRESIDENT

**Craig A. Owyang, MAI**  
RE Appraiser/Consultant  
1640 Laurel Street  
San Carlos, CA 94070-5217  
650/595-8615 FAX 650/595-4073  
craig@owyang.com

### TREASURER

**Karen J. Mann, SRA**  
Mann & Associates  
3100 Mowry Avenue, Suite 205  
Fremont, CA 94538  
510/790-2345 FAX 510/790-1826  
karen@mannaappraisal.com

### SECRETARY

**Neil A. Lefmann, MAI**  
N.A. Lefmann Associates  
1626 West Campbell Avenue  
Campbell, CA 95008  
408/379-3100 FAX 408/379-3602

### CHAPTER OFFICE

110 Sutter Street, Suite 1010  
San Francisco, CA 94104  
415/398-2876 FAX 415/398-4259  
www.appraisalinstitute.org

### Library Hours by Appointment

*Executive Director*

**Lisa M. Estes**  
e-mail: Lisa@NorCal-AI.org

*Administrative Assistant*

**Jenny Greene**  
e-mail: Jenny@NorCal-AI.org

## Appraisers Wanted

**Irwin Home Equity** is seeking an in-house Appraisal Reviewer for our San Ramon headquarters. Responsible for analysis of appraisal and evaluation of alternative appraisal products for overall quality, compliance with USPAP and IHE credit policy. Requires current CA real estate appraiser's license or certification. Minimum 3-years field or review experience. Knowledge of State and Federal laws governing appraisal reporting. Strong analytical skills to identify appraisal issues, report quality issues and ability to reconsider estimated value. Demonstrated ability to document decisioning and rationale in the valuation process. Fax resume to 925/277-3008 or email to jobs@ihe.com.

**Commercial Appraiser.** Applicant should have at least 2+ years of C&I appraisal experience. Current California State certified general license required. Positions in Sacramento and East Bay. Please fax resume, compensation history and references to Hiring Manager, Smith & Associates at 916/567-1149.

## Miscellaneous

**\$800/month** for large private window office at 57 Post Street, San Francisco Financial District. Lease is through May 2001. Share space with two commercial appraisers. Call 415/731-7434 for details.

**For Sale** 36" five drawer lateral file cabinet. \$300/ best offer. Call 415/731-7434.

## Beat the Clock: Register for First Quarter Education Offerings

**H**ave you found yourself needing a few more hours to meet your continuing education requirements? Now is the time to review the list of upcoming education programs on page 5 and register!

If your renewal cycle is about to come due, don't wait to start gathering your attendance certificates and getting all of your continuing education records in order. The Chapter Office only maintains records for seminars and workshops, while the National Office maintains the records for courses (regardless if the course was sponsored by a local chapter).

**T**o request a duplicate attendance certificate for a seminar or workshop offered by the Northern California Chapter, submit your request to the Chapter Office in writing. Due to the volume of requests, only written requests/faxes can be handled. Be sure to include the date (month/year) and the name of the program. As much of the back-up documentation is now stored in archives, *allow a minimum of three weeks for your request to be processed.* Non-affiliates of the Northern California Chapter should include a \$15 processing fee with their written request. *This research will be provided to members of the Northern California Chapter at no charge.*



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**P**lease mark the appropriate boxes below when registering for the January HUB Workshop/Meeting. *Carefully check all that apply.*

I am a:  AI Member  Non-member  
I will attend Jan 20:  Workshop  Dinner  
Dinner preference:  Chicken  Snapper