



CHAPTER COMPLIANCE 2023 DUE DECEMBER 1, 2023

S003 CALIFORNIA STATE CHAPTER

Congratulations! Your NARPM 2023 Chapter Compliance Application form has been approved!

The chapter has met all recertification requirements and is fully certified.

Levels of Chapter Recertification

Full recertification

The chapter has met all recertification requirements, indicated by compliance with items listed on the certificate of compliance. Only fully certified chapters are eligible for Chapter Excellence Awards. Once recertified, an email will be sent.

Chapter in Review (Amended 2022)

Should the Chapter submittal displays lack of submission of any items on the certificate of compliance. Chapters will have six (6) months from compliance deadline to restore their certification. NARPM® Board of Directors must confirm that a Chapter can be taken off Chapter in Review status.

A Chapter will be placed in **Chapter in Review/Conditional Compliance** if documents are not submitted by compliance deadline. Members of the chapter will not be notified when a Chapter is placed in conditional compliance. The chapter must meet the chapter compliance deadline for the following year.

De-certification

De-certification must be preceded by a period of Chapter in Review and indicates continued non-compliance of recertification requirements. NARPM Board of Directors must approve all de-certification of chapters.



CHAPTER COMPLIANCE 2023 due December 1, 2023
ATTENDANCE REQUIREMENTS MET in 2023

S003 CALIFORNIA STATE CHAPTER

Compliance Question:

How many Chapter Leader Calls, hosted by RVPs, did the chapter president, or their representative, participate in? Your chapter president, or their representative, must attend at least two of these calls to obtain chapter compliance.

February 7, 2023, Attendee(s): Michael Braddon

April 4, 2023, Attendee(s): Michael Braddon

August 1, 2023, Attendee(s): Michael Braddon

October 3, 2023, Attendee(s): Michael Braddon

Chapter Bylaws Requirements for President and/or President-Elect to attend Chapter Leadership Training at Annual Convention on October 19, 2023, AND/OR Nuts and Bolts Virtual Session on November 16, 2023.

October 19, 2023, Attendee(s): Michael Braddon & Kevin Patterson

November 16, 2023, Attendee(s): Michael Braddon



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De-certification

De-certification must be preceded by a period of Chapter in Review and indicates continued non-compliance of recertification requirements. NARPM Board of Directors must approve all de-certification of chapters.

Chapter Name

California State

Name of person submitting Chapter Compliance documents

Michael Braddon

Email

michael.braddon@outlook.com

1. Has your chapter made any changes to your bylaws since last year's compliance submission?

NO

2. How many Chapter Leader Calls, hosted by RVPs, did the chapter president, or their representative, participate in?

3

3. File Upload - Chapter Tax Return



CALNARPM 2022 Tax Returnpdf

4. File Upload - Chapter's Profit & Loss Statement



CALNARPM Profit and Loss (...).pdf

5. File Upload - Chapter Budget



16_CALNARPM Profit and Lo... .pdf

6. File Upload - Membership Meetings



CALNARPM Conference Desi... .pdf



CALNARPM Conference Mee... .pdf



CALNARPM Conference Mee... .pdf



CALNARPM Conference Navi... .pdf

7. File Upload - Board of Directors Meeting Minutes



CALNARPM Board Meeting (... .pdf



CALNARPM Board Meeting (... .pdf



CALNARPM Board Meeting (... .pdf



CALNARPM Board Meeting (... .pdf

8. File Upload - Chapter Leadership Names



CALNARPM NEW BOD (2023pdf

9. File Upload - Proof of Elections



CALNARPM Board Meeting V... .pdf

CAREY & RAICEVIC CPAs, INC.
9939 HIBERT ST., SUITE 206
SAN DIEGO, CA 92131-1031
858-566-8020 Office 858-695-7953 Fax

May 11, 2023

CONFIDENTIAL

California State Chapter of
National Association of Residential
16516 Bernardo Center Dr, Suite 330
San Diego, CA 92128

Dear Bob:

We have prepared the enclosed extension forms from information submitted by you without verification or audit. We suggest that you examine these forms carefully to fully acquaint yourself with all items contained therein to ensure that there are no omissions or misstatements. Attached to each form is an instruction sheet for signing and filing. Please follow those instructions carefully.

In order that we may properly advise you of tax considerations, please keep us informed of any significant changes in your financial affairs or of any correspondence received from taxing authorities.

If you have any questions or if we can be of assistance in any way, please do not hesitate to call.

Sincerely,

CAREY & RAICEVIC CPAs, INC.

Filing Instructions

California State Chapter of National Association of Residential

Application for Extension for Form 990-EZ

Taxable Year Ended December 31, 2022

Date Due: May 15, 2023

Remittance: None is required. Your 2022 Form 8868 for Form 990-EZ shows no balance due.

Other: Your extension is being filed electronically with the IRS and is not required to be mailed. Mailing a paper copy of Form 8868 to the IRS will delay the processing of your extension.

The extension for Form 990-EZ is valid until November 15, 2023; therefore, the return must be filed on or before this date. We will be contacting you in advance of this date with the completed return.

Form

8868

(Rev. January 2022)

Department of the Treasury
Internal Revenue Service**Application for Automatic Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-0047

u File a separate application for each return.**u Go to www.irs.gov/Form8868 for the latest information.**

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions. CALIFORNIA STATE CHAPTER OF NATIONAL ASSOCIATION OF RESIDENTIAL	Taxpayer identification number (TIN) 20-1862735
	Number, street, and room or suite no. If a P.O. box, see instructions. 16516 BERNARDO CENTER DR, SUITE 330	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SAN DIEGO CA 92128	

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12
Form 990-T (corporation)	07		

GEORGE DAVIE**16516 BERNARDO CENTER DRIVE STE 330**• The books are in the care of **u SAN DIEGO****CA 92128**Telephone No. ▶ **858-485-6565**

Fax No. ▶

• If the organization does not have an office or place of business in the United States, check this box ▶ ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box ▶ ☐. If it is for part of the group, check this box ▶ ☐ and attach a list with the names and TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until **11/15/23**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☒ calendar year **2022** or▶ ☐ tax year beginning, and ending

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2022)

CALNARPM

Profit and Loss (Proforma)

July 2022 - June 2023

FY 2024

	<u>Total</u>	<u>Budget</u>
Income		
CALNARPM Conference Income		
Attendee Registration	67,150.00	72,522.00
Exhibitor Registration	51,950.00	76,000.00
Total CALNARPM Conference Income	\$ 119,100.00	\$ 148,522.00
Total Income	\$ 119,100.00	\$ 148,522.00
Gross Profit	\$ 119,100.00	\$ 148,522.00
Expenses		
Accounting Fees	1,085.00	1,171.80
Advertising/Promotional	400.00	432.00
CALNARPM Conference Expense		
Audio/Visual Expenses	15,675.55	16,929.59
Hotel/Facilities	51,180.16	100,000.00
Instructor & Speaker Expense	11,779.42	10,000.00
Marketing		
Postage/Printing	1,500.00	1,620.00
Social Media Management and Email Campaigns	3,850.00	4,158.00
Website Services	3,900.00	4,212.00
Total Marketing	\$ 9,250.00	\$ 9,990.00
Reimbursable Expense	1,466.87	1,584.22
Supplies, Gifts, Raffle Items	0.00	0.00
Total CALNARPM Conference Expense	\$ 89,352.00	\$ 138,503.81
Charitable Contributions	1,500.00	1,620.00
Insurance	900.00	972.00
Mail Chimp	600.00	648.00
Merchant Account Fees		
Standard Fees	5,000.00	5,400.00
Total Merchant Account Fees	\$ 5,000.00	\$ 5,400.00
P.O. Box Fees	0.00	0.00
Software Applications	3,000.00	3,240.00
Supplies, Gifts, Raffle Itemst	1,200.00	1,296.00
Taxes		
Franchise Tax Board	25.00	27.00
Total Taxes	\$ 25.00	\$ 27.00
Total Expenses	\$ 103,062.00	\$ 153,310.61
Net Operating Income	\$ 16,038.00	-\$ 4,788.61
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Designation Courses - Developing Owner Relationships

CALNARPM Conference & Trade Show 2023 <narpmcalifornia@gmail.com>

Fri 4/7/2023 9:03 AM

To: mbraddon@hotmail.com <mbraddon@hotmail.com>



MEET THE INSTRUCTOR

BRIAN BIRDY

Developing Rewarding Owner Relationships DESIGNATION COURSE

This fundamental course covering the four (4) steps in the cycle of owner relations will assist you in developing and managing your clients from first contact to termination.

MAY 17, 2023 9AM - 4PM PDT

The banner features a compass rose logo with a blue and green design. To the left is the NARPM logo. The text "Navigating Uncertainty" is in large green letters, with "Managing with Confidence in Turbulent Times" in smaller blue letters below it. The dates "MAY 17-19, 2023" are in large green letters, followed by "MARGARITAVILLE RESORT PALM SPRINGS" in blue. To the right, "CALNARPM CONFERENCE" is in blue, with "2023" in large green letters. A blue button with white text says "REGISTER NOW!". The background shows a sailboat on the water.

[Get My Conference Ticket](#)[I can't make it](#)[SEE THE SCHEDULE AND SPEAKER LINEUP](#)

Introducing Brian Birdy

Designation Course
Developing Rewarding Owner Relationships
May 17, 2023

This fundamental course covering the four (4) steps in the cycle of owner relations will assist you in developing and managing your clients from first contact to termination. From the big picture to the small details, you will learn industry best practices

EDUCATION COURSES**MAY 17, 2023****CONFERENCE****MAY 18-19, 2023***Margaritaville Resort
Palm Springs*1600 N Indian Canyon Dr, Palm
Springs, CA 92262
Phone: 760-327-8311[Get a Room](#)**CONFERENCE SPONSOR****CONFERENCE PARTNERS****GOLD SPONSORS****SHOWMOJO****ZInspector**

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in obtaining new clients and working with them during several scenarios.



Brian Birdy, MPM® RMP®, served for 15 years in the United States Air Force before starting in property management. He started working for the family business in 1997. PMI Birdy Properties has specialized in property management for over 40 years. Brian has taken the company from a one-man office with 75 properties to a business of over 15 employees that manages over 1600 properties. In addition to his NARPM® designations, he has received the Certified Property Manager (CPM®) designation from IREM®. He is an approved Property Management Instructor for the States of Texas, Florida, Utah, and Washington as well as NARPM®. Brian holds a Real Estate Broker license in Texas, Missouri, and Washington.

[REGISTER FOR DEVELOPING REWARDING OWNER RELATIONSHIPS](#)

Early Bird Registration Now Open!

Education Events
May 17, 2023

Conference
May 18 - 19, 2023

Gain the skills needed to navigate uncertainty. Property Managers and Business Leaders face challenges every day and need to take action during unpredictable times. We are wired to prefer predictability and security and are action-oriented but the last few years have been anything but predictable.

Look for the schedule and more details coming soon!



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GENERAL ADMISSION

\$ 395

\$495 After April 18, 2023

Early Bird Special

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At the Conference - Physical and Mental Health in Property Management

CALNARPM Conference & Trade Show 2023 <narpmcalifornia@gmail.com>

Wed 4/19/2023 8:06 AM

To:mbraddon@hotmail.com <mbraddon@hotmail.com>



MEET THE SPEAKERS

PETER HERNANDEZ, KAREN JORDAN, NICOLLE CRIM, PETE NEUBIG

Physical and Mental Health in Property Management / The REAL Future of Property Management

We will highlight the challenges that come with this profession and how that at times puts our health last. The presentation will also help give everyone the tools needed to either get started or continue to put themselves first.



PETER



PETE



KAREN



NICOLLE



Navigating Uncertainty
Managing with Confidence in Turbulent Times

MAY 17-19, 2023

MARGARITAVILLE RESORT
PALM SPRINGS

CALNARPM
CONFERENCE

2023

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Peter Hernandez Panel: Physical and Mental Health in Property Management

**[SEE THE SCHEDULE
AND SPEAKER LINEUP](#)**

**DESIGNATION
COURSES**

The panel presentation highlights the importance of taking good care of your health from both a mental and physical perspective. Property management is very challenging and ever-changing, which requires every property manager professional to be in the best health possible both mentally and physically. We will highlight the challenges that come with this profession and how that at times puts our health last. The presentation will also help give everyone the tools needed to either get started or continue to put themselves first. Here's our

MAY 17, 2023**Developing Rewarding
Owner Relationships****Tenancy****CONFERENCE
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motto - Eat Right, Play Hard, Live Life I am hoping to
help professionals understand that you cannot run a
successful business if you are not healthy.**PANEL OF EXPERTS INCLUDE**[Peter Hernandez](#)[Pete Neubig](#)[Karen Jordan](#)[Nicolle Crim](#)**Designation Courses
May 17, 2023****Conference
May 18 - 19, 2023****Gain the skills needed to navigate uncertainty.**
Property Managers and Business Leaders face
challenges every day and need to take action
during unpredictable times. We are wired to prefer
predictability and security and are action-oriented



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At the Conference - KPIs with a Twist

CALNARPM Conference & Trade Show 2023 <narpmcalifornia@gmail.com>

Wed 4/26/2023 10:03 AM

To:mbraddon@hotmail.com <mbraddon@hotmail.com>



MEET THE SPEAKER

DEB NEWELL

KPIs with a Twist

The focus is to help make KPIs more tangible for each role. We will work on breaking part the role of a property manager, how to build out expectations, and learn what KPIs should look like. Each company is structured differently.



A banner for the CALNARPM CONFERENCE 2023. It features a compass rose logo with a house icon and the text "NARPM™". Below the logo is the title "Navigating Uncertainty" in blue and green, followed by the subtitle "Managing with Confidence in Turbulent Times". The dates "MAY 17-19, 2023" are in large green letters, and the location "MARGARITAVILLE RESORT PALM SPRINGS" is in blue. A sailboat is visible on the right side of the banner. A blue button with white text says "REGISTER NOW!".

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[I can't make it](#)
[SEE THE SCHEDULE AND SPEAKER LINEUP](#)
DESIGNATION COURSES

KPIs with a Twist

Deb Newell

The focus is to help make KPIs more tangible for each role. We will work on breaking part the role of a property manager, how to build out expectations, and learn what KPIs should look like.

Each company is structured differently. Each role is laid out differently. We will work on visualizing what you want your company to look like and how you can achieve that with expectations you can manage.

Whether you are new to the business or have been in business for 10 or more years, we can lose sight of the structure and foundation of each role, including what we

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should be measuring and how. My goal is that everyone will leave with a renewed desire to (re)build accountability into each role and know what numbers to measure the success of the company.



Deb Newell, MBA, MPM® RMP® has a passion for helping others fix their business. A self-described "Fixer and Implementer," Entrepreneur, Strategic Leader, and Consultant, she offers expert one-on-one consulting, by finding solutions to each business' pain points. Since 2010 she has refined and perfected her craft, focusing on people, processes, and technology. She has successfully helped companies increase revenue, grow their business through doors and talent, assist with acquisitions through valuation, address marketing needs, create strategic plans, and more. Deb holds a double concentration MBA in Leadership and Marketing, with a B.S. in Political Science, and is currently working on her Ph.D. with an Emphasis in Qualitative Industrial and Organizational Psychology. She has a background in leadership training, business strategy, project management, maintenance solutions, team development, S.W.O.T. analysis, revenue growth, and product solutions. Deb's expertise stems from Six Sigma training and providing bottom-line results with a lean management style. Her specialty is identifying and providing solutions to pain points in her client's business, with a balanced approach to ensure that the root cause of an issue is addressed rather than just 'symptom solving.' Deb also has a proven approach to maintenance, aiding companies to successfully create, execute, and profit from maintenance.

**Designation Courses
May 17, 2023****Conference
May 18 - 19, 2023**

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Check out the CALNARPM Conference Schedule Highlights!

CALNARPM Conference & Trade Show 2023 <narpmcalifornia@gmail.com>

Wed 5/10/2023 9:04 AM

To:mbraddon@hotmail.com <mbraddon@hotmail.com>



SEE THE SCHEDULE AND SPEAKER LINEUP	The CALNARPM Conference Presentation Highlights! Keynote - Uncommon Ways to Solve Common Problems Christy Primmer Making Your Renewal Process More Efficient and Profitable through Automation Paul Kankowski HOAs or No Way Scott Brady Optimizing Your Personal Brand on Social Media: Be the Boss of Your Online Presence! Drea Hespen Resident Benefit Package: Maximizing Value and Profits Glen Lastimoza Are You Ready For A Vacation? 5 Steps to Automate Your Biz Eric Beckman
Register Now! I can't make it	
DESIGNATION COURSES MAY 17, 2023 Developing Rewarding Owner Relationships Tenancy	

CONFERENCE MAY 18-19, 2023

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Physical and Mental Health in Property Management
/ The REAL Future of Property Management
[Peter Hernandez](#), [Karen Jordan](#), [Nicolle Crim](#), [Pete Neubig](#)

DRE Audits - Be Proactive Not Reactive
[Tracey Merrell](#)

Franchise Tax Board - Withholding Tax for Owners in
CA

Chanel Yates, Sonia Caramazza

63-Unit Acquisition: A Triple Win Case Study
[Rhianna Campbell](#)

Developing a Culture of Leadership
[Anne Lackey](#)

Crisis in Your Business: Level Up Your Survival
Skills

[Keith T. Becker](#), [Matthew Tandy](#), [Chris Matteucci](#),
[Mark Scott](#) & [Jan Leasure](#)

KPIs with a Twist
[Deb Newell](#)

The Best Tech Tools for applying the "Getting Things
Done" philosophy to Remote Teams

[Andrew Wallace](#)

Make the Google Stars Align In Your Favor
[Marie Tepman](#)

Gain Confidence in Risk Management with Insurance
- Panel

[Curt Bulloch](#), Neil Patrick McGowan, Brandon D. Biagi

Practical Considerations with the Protected Class of
Source of Income

[Tracey Merrell](#)

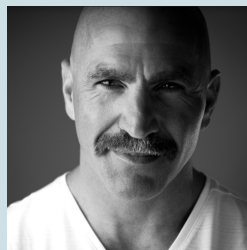
Closing Session
Don't be a Boss; Be a Business Owner

[Steve Rozenberg](#)

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Steve Rozenberg



Deb Newell

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Christy Primmer



Paul Kankowski



Jan Leasure



Pete Neubig



Matthew Tandy



Karen Jordan



Chris Matteucci



Anne Lackey



Nicole Crim



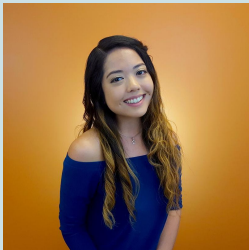
Eric Beckman



Andrew Wallace



Glen Lastimoza



Marie Tepman



Peter Hernandez



Scott Brady



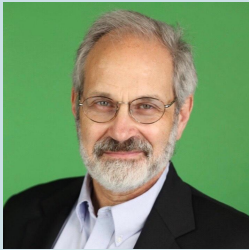
Rhianna Campbell



Tracey Merrell



Drea Hespen



Keith Becker



Mark Scott



Sonia Caramazza &
Chanel Yates



Andrew Wallace



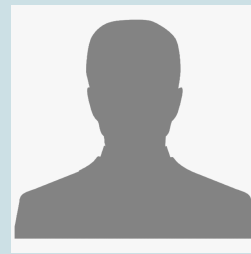
Vickie Gaskill



Brian Birdy



Curt Bulloch



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2022-2023 CALNARPM Executive Team

Matt Tandy, President
Chris Matteucci, President-Elect
Michael Braddon, Treasurer
Karen Jordan, Secretary
Keith Becker, Past President

CalNARPM Executive Board Meeting Agenda

Wednesday, January 11, 2023 – 9:00 am PST via Zoom

1. **Called to order: Matt Tandy 9:09 am**
2. **Quorum Confirmed: Matt Tandy** (Keith Becker, Tracey Merrell, Matt Tandy, Karen Jordan, Anne Lackey, Chris Matteucci, Michael Braddon)
3. **NARPM Code of Ethics, read by: Skipped**
 - Article 2: DISCRIMINATION
 - i. The Property Manager shall not discriminate in the management, rental, lease, or negation for real property, shall operate consistent with fair housing laws and regulations and shall comply with all federal, state, and local laws concerning discrimination.
 - ii. STANDARDS OF PROFESSIONALISM
 - 1. 2-1 It is the duty of the Property Manager to educate those with whom the Property Manager is affiliated to comply with all fair housing laws and laws regarding discrimination.
 - 2. 2-2 The Property Manager shall not deny service to any person due to sex, race, religion, color, national origin, handicap, family status, or sexual orientation or identity.

(Find the rest of the Code of Ethics at <https://www.narpm.org/code-of-ethics/>)
4. **Our Purpose, read by: Matt Tandy**
 - a. **The purpose of CalNARPM**
 - i. Establish a permanent trade association in the residential property management industry in the State of California.
 - ii. To promote a standard of business ethics, professionalism, and fair practices among its members.
 - iii. To establish and promote the education of its members.
 - iv. To provide and promote an exchange of ideas regarding residential property management.
 - v. To educate and promote the legislative initiative in the State of California.
5. **President's Update: Matt Tandy**
 - a. Matt will be having a throat biopsy and may not be able to run the meeting, Chris may be asked to take over and help during Matt's recovery.
6. **Secretary's Report: Karen Jordan**
 - a. Meeting minutes reviewed from last month's meeting - Karen made the motion to approve, Keith made 2nd to approve, all in favor.

7. Conference Committee: Karen Jordan and Tracey Merrell

- a. Drea doing her part for call to speakers, they are coming in due at the end of January
- b. Keynote speaker Christy Primmer needs to update her blurb on website to be more targeted towards our conference. What is she speaking about? Matt suggested to reach out to her to clarify her presentation be more tailored towards the PM business owners, Tracy offered to help write this for website
- c. Meeting to be scheduled with Christy Primmer to help get this on website
- d. Matt has denied presentation from Scott Lesnick as a speaker for the conference
- e. So far all good with hotel, contract signed for additional rooms, Michael will send copy so she can keep track in her folder

8. Legislative Committee: Keith Becker

- a. At end of Dec. Michael Weinstein announced campaign to turn over Costa Hawkins in 2024, it will be a battle for our industry
- b. Important for NARPM, CAA, Board of Realtors to pull together and start early to help defeat
- c. Tracey Merrell suggested reaching out to other similar groups to work together

9. Membership Committee: Kevin Patterson - Not Present No update

- a.

10. Affiliate Update: Anne Lackey

- a. 100% of highest level of sponsorship sold out
- b. Another email going out to new sponsors
- c. Website is live, social media post to go out soon
- d. No check from Yardi yet, all other checks cashed
- e. Excited at progress and we are on target

11. Treasurer's Report: Michael Braddon

- a. Union bank's relationship solidified
- b. Keynote speaker's deposit paid
- c. A meeting was scheduled with CPA to review books from last year
- d. A balance sheet will be available soon
- e. Keeping track of all vendor/sponsorship payments

12. Upcoming Meetings

- a. California Local Chapter Presidents Meeting: Wednesday, January 11, 2023, 8:30 AM - 8:55 AM
- b. General Board Meeting: Wednesday, February 8, 9:00 AM - 9:55 AM
- c. Executive Meeting: Wednesday, February 8, 10:00 AM - 10:30 AM
- d. Conference Committee: January 25 2023 8:30 am

13. Adjourned 9:58 am

2022-2023 CALNARPM Executive Team

Matt Tandy, President
Chris Matteucci, President-Elect
Michael Braddon, Treasurer
Karen Jordan, Secretary
Keith Becker, Past President

CalNARPM Executive Board Meeting Agenda

Wednesday, March 8, 2023 – 9:00 am PST via Zoom

1. **Called to order: Matt Tandy 9:09 am**
2. **Quorum Confirmed: Matt Tandy** (Keith Becker, Tracey Merrell, Matt Tandy, Karen Jordan, Anne Lackey, Chris Matteucci, Michael Braddon, Kevin Patterson)
3. **NARPM Code of Ethics, read by: Skipped**
 - Article 2: DISCRIMINATION
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 - v. To educate and promote the legislative initiative in the State of California.
5. **President's Update: Matt Tandy**
 - a. Chapter Compliance due
 - b. New member mentor - Keith Becker will step up - Michael Braddon made motion- Chris Matteucci seconds the motion - all in favor
 - c. Motion to amend bi-laws for 2 yr term for president and president-elect- Motion made all in favor
 - d. limit president in certain decision making, 2 signer requirement - Matt will look into this at next meeting -

6. Secretary's Report: Karen Jordan

- a. Working with Michael on Chapter compliance report
- b. Meetings from previous meeting to be approved

7. Conference Committee: Karen Jordan and Tracey Merrell

- a. Hold off on letting speakers know about free registration to see if registration numbers increase
- b. Outdoor space can be used free of charge for DJ or we can use pool area for \$1000- board agrees to use the pool area for outdoor event

8. Legislative Committee: Keith Becker

- a. At end of Dec. Michael Weinstein announced campaign to turn over Costa Hawkins in 2024, it will be a battle for our industry
- b. Important for NARPM, CAA, Board of Realtors to pull together and start early to help defeat
- c. Tracey Merrell suggested reaching out to other similar groups to work together

9. Membership Committee: Kevin Patterson -

- a.

10. Affiliate Update: Anne Lackey

- a. Anne advised no new sign ups- emails have gone out, current revenue is at \$39,800
- b. Sharing venue with another organization during our event, no longer able to use the lobby will need to rework the tradeshow floor plan
- c. Anne and Michael will review set up together
- d. Kevin will reach out to other vendors for sponsoship
- e. \$325 registration charge for additional attendees

11. Treasurer's Report: Michael Braddon

- a. CPA books to get done in a few weeks
- b. Working on chapter compliance need survey monkey report, Matt will provide to Michael

12. Upcoming Meetings

- a. California Local Chapter Presidents Meeting: Wednesday, January 11, 2023, 8:30 AM - 8:55 AM
- b. General Board Meeting: Wednesday, February 8, 9:00 AM - 9:55 AM
- c. Executive Meeting: Wednesday, February 8, 10:00 AM - 10:30 AM
- d. Conference Committee: January 25 2023 8:30 am

13. Adjourned 9:58 am



National Association of Residential Property Managers
CALIFORNIA STATE CHAPTER

2022-2023 CALNARPM Executive Team

Matt Tandy, President
Chris Matteucci, President-Elect
Michael Braddon, Treasurer
Karen Jordan, Secretary
Keith Becker, Past President

CalNARPM Executive Board Meeting Agenda

Wednesday, April 12, 2023 – 9:00 am PST via Zoom

1. **Called to order: Matt Tandy 9:06 am**
2. **Quorum Confirmed: Matt Tandy** (Keith Becker, Tracey Merrell, Matt Tandy, Karen Jordan, Anne Lackey, Michael Braddon, Kevin Patterson). Also in attendance: AJ Shepard
3. **NARPM Code of Ethics, read by: Karen Jordan**
 - Article 2: DISCRIMINATION
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4. **Our Purpose, read by: Kevin Patterson**
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 - v. To educate and promote the legislative initiative in the State of California.
5. **President's Update: Matt Tandy**
 - a. Need to change the bylaws to change the terms for the board to two years.
 - b. Reviewed legislation that CAA has prioritized to be opposed
 - c. Spoke about the concern of running out of time to make an impact during his presidential term
 - d. Spoke about trends across the board on conferences and how last year was a year attendees were excited about meeting in person and social interaction, this year there are many concerns about various things like the economy, and more

smaller focused based conferences/gatherings that some of the more common speakers are now hosting.

6. Secretary's Report: Karen Jordan

- a. Reviewed minutes from the last meeting; need to make an amendment that the 2 yr term is not just for the President and President-Elect but for all board members.
- b. Meetings from the previous meeting to be approved with conditional amendment: Michael makes a motion to approve, and Keith seconds, all in favor.
- c. Karen to work with Michael on the Chapter Excellence; AJ will share the requirements via email.

7. Conference Committee: Tracey Merrell

- a. Dave Mancini joined the call at 9:34 am to review his DJ services and use of his AV equipment instead of AV from the hotel, and he also presented an offer to be a Transitional Host for an additional cost of \$1150 - Michael made a motion to approve the estimate without the transitional host option, Karen seconded, all in favor.
- b. Reviewed the menu choices, and it was decided that the Baja menu would be a good option for food - the final headcount for this will be due to the hotel within the week before the conference.
- c. The goal is to reach 120 attendees - this will help us at least break even in the budget.
- d. Board agreed to confirm with National that we will guarantee the educational classes even if the minimum registration is not met by their due date of 04/17/2023

8. Legislative Committee: Keith Becker - Skipped

- a.

9. Membership Committee: Kevin Patterson - Skipped

- a.

10. Affiliate Update: Anne Lackey

- a. Anne advised 1 new sign; up- current revenue is at \$46,300
- b. 14 booths remain to be sold
- c. Maybe another \$5000 may come in for revenue
- d. Home Depot is not coming - conflict with another conference at the same time.
- e. So it looks like most attendees are brokers/decision-makers so vendors will be happy with this interaction.
- f. Anne still needs a decision if the \$325 registration charge for additional attendees.

11. Treasurer's Report: Michael Braddon

- a. 76 registrations so far, goal is to get 120 attendees
- b. With \$30k in reserves, we may break even or be down about \$10K- with a lower hotel cost and cost-effective selections by Tracey, this will help with the budget.
- c. Working with Nationals to complete chapter compliance has been challenging and taking much more time than he had anticipated due to new procedures being enforced by National.

12. Upcoming Meetings

- a. California Local Chapter Presidents Meeting: Wednesday, May 10, 2023, 8:30 AM - 8:55 AM
- b. General Board Meeting: Wednesday, May 10, 9:00 AM - 9:55 AM
- c. Executive Meeting: Wednesday, May 10, 10:00 AM - 10:30 AM
- d. Conference Committee: May 3 2023 8:30 am

13. Adjourned 10:43 am

2022-2023 CALNARPM Executive Team

Chris Matteucci, President
Kevin Patterson, President-Elect
Michael Braddon, Treasurer
Karen Jordan, Secretary
Matt Tandy, Past President

CalNARPM Executive Board Meeting Agenda

Wednesday, October 11, 2023 – 9:00 am PST via Zoom

1. **Called to order:** Chris Matteucci 9:03 am
2. **Quorum Confirmed:** Chris Matteucci (Keith Becker, Matt Tandy, Karen Jordan, Michael Braddon, Kevin Patterson, Chris Mattuecc, Drea Hespeni)
3. **NARPM Code of Ethics, read by:** Chris
 - Article 2: DISCRIMINATION
 - i. The Property Manager shall not discriminate in the management, rental, lease, or negation for real property, shall operate consistent with fair housing laws and regulations and shall comply with all federal, state, and local laws concerning discrimination.
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4. **Our Purpose, read by:** Chris
 - a. **The purpose of CalNARPM**
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 - iv. To provide and promote an exchange of ideas regarding residential property management.
 - v. To educate and promote the legislative initiative in the State of California.
5. **President's Update:** Chris Matteucci
 - a. We are waiting on contracts for two of three keynote speakers
 - b. Working on insurance with Curt Bulloch
 - c. Enterprise Bank will be at the same sponsorship level

6. Secretary's Report: Karen Jordan

- a. Michael will help Karen with the required annual filings due 12/1
- b. Per NARPM National the new change to bi laws should have the "option" to be certified or not to renew the person by vote of board for 2 yr term.

7. Conference Committee: Chris and Matt reviewed

- a. Make sure Laurie gets Matt included in all emails as he had not seen new logo for conference.
- b. New logo needs to get confirmed so we can start drip campaign
- c. Some early bird registrations are coming in
- d. Melanie Barker - from CAR - needs a formal invite so she can submit speaker proposal - Michael and Chris will follow up with her
- e. Jameson - (from Bakersfield) NARPM member who is interested in helping with conference committee - Kevin will follow up with him
- f. Chris will follow up with all open postions

8. Legislative Committee: Keith Becker -

- a. Junk fees, legislation just released by FTC, Keith will review
- b. Security deposit bill has not been signed, but will go into effect 07/2024
- c. AB1482 defines major work requires a permit, increased penalties and owners can now be sued
- d. Tenant displacement - owner must live in home for 1 yr or offer previous resident same rent

9. Membership Committee: Kevin Patterson -

- a. Kevin asked if we should have a presentation on EPA certification

10. Affiliate Update: Drea and Michael

- a. Working on outreach program for vendors on next conf committee meeting
- b. Work with Laurie on what the sponsorship levels will include
- c. 20 Early bird registrations so far

11. Treasurer's Report: Michael Braddon

- a. No change in financial numbers
- b. 2nd payment to hotel due at end of month
- c. Enterprise Bank was refunded for their credit

12. Upcoming Meetings

- a. California Local Chapter Presidents Meeting: Wednesday, November 15, 2023, 8:30 AM - 8:55 AM
- b. General Board Meeting: Wednesday, November 15, 9:00 AM - 9:55 AM
- c. Executive Meeting: Wednesday, November 15, 10:00 AM - 10:30 AM
- d. Conference Committee: November 15 2023 8:30 am

13. Adjourned 9:58 am

Rebecca Woodring

From: Michael Braddon <michael@orionmrinc.com>
Sent: Tuesday, November 14, 2023 2:55 PM
To: Rebecca Woodring
Cc: Chris Matteucci (chris@atlas-pm.com); kevin patterson; Karen Jordan (karen@hbrrentals.com)
Subject: RE: 2024 California NARPM Chapter (CALNARPM) Chapter Officers

Follow Up Flag: Follow up
Flag Status: Flagged

Rebecca,

California NARPM State Chapter July 2023 – June 2024 (CALNARPM)

I wanted to confirm the 2023 - 2024 Chapter Officers:

Chris Matteucci, President
Kevin Patterson, President Elect
Matt Tandy, Past President
Karen Jordan, returning Secretary
Michael Braddon, returning Treasurer

If you need any other documentation please let me know !!

Thanks,

Michael

Michael Braddon, MBA, GRI
President / Principal Broker
Orion Management & Realty, Inc.
1210 28th Street
San Diego, CA 92102
619-992-3196 cell
619-713-7300 fax
<http://www.OrionMRInc.com>
DRE # 01935996

Melody San Miguel, Executive Assistant
(619) 758-3046 cell
Melody@OrionMRInc.com

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President of California NARPM 2018-19, Treasurer 2022-2024
San Diego NARPM Chapter President 2016-17; Interim President 2022-2024

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From: Rebecca Woodring <rwoodring@managegroup.com>
Sent: Wednesday, November 1, 2023 11:03 AM
Subject: NARPM Chapter Compliance Open & Upcoming Deadlines
Importance: High

Hi Chapter Leaders,

A new process to submit your Chapter Compliance is live! Please submit your Chapter Compliance by December 1, 2023, using this NEW link:
<https://form.jotform.com/rwoodring/narpm-chapter-compliance-120123>.

And a reminder of important deadlines:

- [2024 Chapter Officers & Directors names due](#). This is now PAST DUE!!!
- **November 16, 2023** – Chapter Leadership Training “Nuts and Bolts”. RSVP [HERE](#). REQUIRED! All Chapter Leaders are invited and encouraged to attend.
- **December 1, 2023** – [Grant applications](#) close for 2023.
- **December 1, 2023** – [Chapter Compliance is Due for all 2023 Documents. NEW DATE and REQUIRED!!](#)
- **December 6, 2023** – Chapter Leadership Training “What’s In Your Culture...A Closer Look at Transactional vs. Transformational Leadership” – RSVP [HERE](#).

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Thank you all for all you do for your Chapters and NARPM! We always appreciate your willingness to volunteer!



Rebecca Woodring, CAE

DEPUTY EXECUTIVE DIRECTOR | rwoodring@narpm.org

National Association of Residential Property Managers

1403 Greenbrier Parkway, Suite 150, Chesapeake, VA 23320 | P 800-782-3452 | M 757-287-6001 |

www.narpm.org

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Rebecca Woodring

From: Michael Braddon <michael@orionmrinc.com>
Sent: Wednesday, November 29, 2023 6:25 PM
To: Rebecca Woodring
Cc: Chris Matteucci (chris@atlas-pm.com); kevin patterson; Karen Jordan (karen@hbrrentals.com)
Subject: RE: 2024 California NARPM Chapter (CALNARPM) Chapter Officers [UPDATED]

Follow Up Flag: Follow up
Flag Status: Flagged

Member Mentor -

Keith Becker, MPM, RMP (Santa Rosa, CA)

Michael Braddon, MBA, GRI
President / Principal Broker
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From: Rebecca Woodring <rwoodring@managegroup.com>
Sent: Tuesday, November 14, 2023 2:15 PM
To: Michael Braddon <michael@orionmrinc.com>
Cc: Chris Matteucci (chris@atlas-pm.com) <chris@atlas-pm.com>; kevin patterson <kevinpatterson21@msn.com>; Karen Jordan (karen@hbrrentals.com) <karen@hbrrentals.com>
Subject: RE: 2024 California NARPM Chapter (CALNARPM) Chapter Officers

Thanks Michael.

Be sure to include this and the name of the New Member Mentor when submitting for Chapter Compliance.

Thanks again!



Rebecca Woodring, CAE

DEPUTY EXECUTIVE DIRECTOR | rwoodring@narpm.org

National Association of Residential Property Managers

1403 Greenbrier Parkway, Suite 150, Chesapeake, VA 23320 | P 800-782-3452 | M 757-287-6001 |

www.narpm.org

Legislative Office | 1200 G Street NW, 8th Floor, Washington, DC 20005 | P: 202-918-1135

Join the Conversation in the NARPM Community today!

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From: Michael Braddon <michael@orionmrinc.com>

Sent: Tuesday, November 14, 2023 2:55 PM

To: Rebecca Woodring <rwoodring@managegroup.com>

Cc: Chris Matteucci (<chris@atlas-pm.com>) <chris@atlas-pm.com>; kevin patterson <kevinpatterson21@msn.com>;

Karen Jordan (<karen@hbrrentals.com>) <karen@hbrrentals.com>

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Kevin Patterson, President Elect

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Michael Braddon, returning Treasurer

If you need any other documentation please let me know !!

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Michael Braddon

From: Michael Braddon
Sent: Wednesday, November 29, 2023 3:25 PM
To: 'Rebecca Woodring'
Cc: Chris Matteucci (chris@atlas-pm.com); kevin patterson; Karen Jordan (karen@hbrrentals.com)
Subject: RE: 2024 California NARPM Chapter (CALNARPM) Chapter Officers [UPDATED]

Member Mentor -

Keith Becker, MPM, RMP (Santa Rosa, CA)

Michael Braddon, MBA, GRI
President / Principal Broker
Orion Management & Realty, Inc.
1210 28th Street
San Diego, CA 92102
619-992-3196 cell
619-713-7300 fax
<http://www.OrionMRInc.com>
DRE # 01935996

Melody San Miguel, Executive Assistant
(619) 758-3046 cell
Melody@OrionMRInc.com

NOTE: Not a licensed real estate agent; cannot negotiate terms

Graduate REALTOR® Institute July 2020

President of California NARPM 2018-19, Treasurer 2022-2024
San Diego NARPM Chapter President 2016-17; Interim President 2022-2024

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From: Rebecca Woodring <rwoodring@managegroup.com>
Sent: Tuesday, November 14, 2023 2:15 PM
To: Michael Braddon <michael@orionmrinc.com>
Cc: Chris Matteucci (chris@atlas-pm.com) <chris@atlas-pm.com>; kevin patterson <kevinpatterson21@msn.com>; Karen Jordan (karen@hbrrentals.com) <karen@hbrrentals.com>
Subject: RE: 2024 California NARPM Chapter (CALNARPM) Chapter Officers

Thanks Michael.

Be sure to include this and the name of the New Member Mentor when submitting for Chapter Compliance.

Thanks again!



Rebecca Woodring, CAE

DEPUTY EXECUTIVE DIRECTOR | rwoodring@narpm.org

National Association of Residential Property Managers

1403 Greenbrier Parkway, Suite 150, Chesapeake, VA 23320 | P 800-782-3452 | M 757-287-6001 |

www.narpm.org

Legislative Office | 1200 G Street NW, 8th Floor, Washington, DC 20005 | P: 202-918-1135

Join the Conversation in the NARPM Community today!

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From: Michael Braddon <michael@orionmrinc.com>

Sent: Tuesday, November 14, 2023 2:55 PM

To: Rebecca Woodring <rwoodring@managegroup.com>

Cc: Chris Matteucci (chris@atlas-pm.com) <chris@atlas-pm.com>; kevin patterson <kevinpatterson21@msn.com>;

Karen Jordan (karen@hbrrentals.com) <karen@hbrrentals.com>

Subject: RE: 2024 California NARPM Chapter (CALNARPM) Chapter Officers

Rebecca,

California NARPM State Chapter July 2023 – June 2024 (CALNARPM)

I wanted to confirm the 2023 - 2024 Chapter Officers:

Chris Matteucci, President

Kevin Patterson, President Elect

Matt Tandy, Past President

Karen Jordan, returning Secretary

Michael Braddon, returning Treasurer

If you need any other documentation please let me know !!

Thanks,

Michael

Michael Braddon, MBA, GRI

President / Principal Broker

Orion Management & Realty, Inc.

1210 28th Street

San Diego, CA 92102

619-992-3196 cell

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From: Rebecca Woodring <rwoodring@managegroup.com>
Sent: Wednesday, November 1, 2023 11:03 AM
Subject: NARPM Chapter Compliance Open & Upcoming Deadlines
Importance: High

Hi Chapter Leaders,

A new process to submit your Chapter Compliance is live! Please submit your Chapter Compliance by December 1, 2023, using this NEW link:

<https://form.jotform.com/rwoodring/narpm-chapter-compliance-120123>.

And a reminder of important deadlines:

- [2024 Chapter Officers & Directors names due](#). This is now PAST DUE!!!
- **November 16, 2023** – Chapter Leadership Training “Nuts and Bolts”. RSVP [HERE](#). REQUIRED! All Chapter Leaders are invited and encouraged to attend.
- **December 1, 2023** – [Grant applications](#) close for 2023.
- **December 1, 2023** – [Chapter Compliance is Due for all 2023 Documents. NEW DATE and REQUIRED!!](#)
- **December 6, 2023** – Chapter Leadership Training “What’s In Your Culture...A Closer Look at Transactional vs. Transformational Leadership” – RSVP [HERE](#).

Is your Chapter ready to work with a NARPM Remote Professional? Administrative Remote Professionals are NARPM trained, offer your Chapter 12 hours per month of administrative services, and are assigned on a first-come, first-served basis. Bookkeeping Remote Professionals offer your Chapter 3 hours per month of bookkeeping services, and are also assigned on a first-come, first-served basis. [Let us know you're ready by completing this survey.](#)

Thank you all for all you do for your Chapters and NARPM! We always appreciate your willingness to volunteer!



Rebecca Woodring, CAE

DEPUTY EXECUTIVE DIRECTOR | rwoodring@narpm.org

National Association of Residential Property Managers

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Minutes

2023-2024 Executive & Conference Board Meeting

Thursday, August 17th, 2023

Conference Zoom Call 11:30 AM

Executive Board Meeting:

- **Call to Order/Introductions** – *Chris Matteucci – President*
Called to order 11:30 AM
 - A. Present: Chris Matteucci, Matt Tandy, Michael Braddon and Karen Jordan
 - B. Absent: N/A
- **NARPM® Code of Ethics** – *Chris Matteucci – President*

Article 3: RESPONSIBILITY TO CLIENT

When working in a disclosed relationship with a client, the Property Manager shall protect the client's best interest at all times.

STANDARDS OF PROFESSIONALISM

- **3-1** The Property Manager shall use written agreements, and written extensions, if required, outlining all responsibilities and fees, if any. The Client will be provided a copy of all signed agreements and extensions, and the Property Manager will retain a copy.
- **3-2** The Property Manager shall communicate regularly with the Client, either orally or in writing and shall provide the Client with written reports as needed and as agreed between all parties. In the event of any dispute, the Property Manager shall provide a written accounting as soon as practical.
- **3-3** Should the Property Manager have a disclosed relationship with a property owner, the Property Manager shall review and verify all Tenant applications to determine the applicant's ability to pay rental fees and to assess the likelihood that the applicant will comply with all provisions of the rental agreement.
- **3-4** The Property Manager shall accept no commissions, rebates, profits, discounts, or any other benefit which has not been fully disclosed to and approved by the Client.
- **3-5** The Property Manager shall not mislead a potential Client about the rental market value of a property in an attempt to secure a rental listing.
- **3-6** The Property Manager shall disclose to his or her Client all pertinent facts relating to any transaction.



▪ **Secretary's Report** – *Karen Jordan - Secretary*

Vote needed to approve the Minutes of the April 12th, 2023 BOD Meeting.

Michael made motion to approve, Chris seconded. All in favor. Motion approved.

▪ **Treasurer's Report** – Michael Braddon

A. Union Bank: New Signature Card Required: **COMPLETED**

B. Financials – no change from June 2023 preliminary reports

▪ **2022-2023 Board** – *Chris Matteucci – President*

A. APPROVED BOD slate of candidates

- Chris Matteucci, President
- Kevin Patterson, President-Elect
- Matt Tandy, Past President
- Michael Braddon, Treasurer
- Karen Jordan, Secretary
- Keith Becker, Member Mentor

Keith T Becker, nominating committee, stated that it vote was unanimous.

▪ Michael made motion to accept, Chris seconded. All in favor. Confirmed.

▪ **CALNARPM 2024 Conference Committee** – *Chris Matteucci – President*

A. Location: Napa – **The Meritage Resort and Spa Signed**

B. Dates: **March (27) 28-29, 2024**

C. Proposed Speaker Budget \$10K – 20K;

D. **RFP Needed** – Sept 2023

E. **Price Increases (inflation 8%):**

- **Vendor/Affiliate Pricing needs to be reviewed**
- **Attendee Pricing needs to be reviewed**

▪ **Communication** – No updates.



2023-2024 CALNARPM Board of Directors

Chris Matteucci, President

Matt Tandy, Past President

Kevin Patterson, President-Elect

Karen Jordan, Secretary / Conference Chair

Michael Braddon, Treasurer

Tracey Merrell, Conference Chair Advisor

- **Legislative** – No updates.

- **Membership** – Kevin Patterson

A. Laurie @ EliteVenu New Membership Campaign

- **Old Business** – *Chris Matteucci – President*

No updates.

- **New Business** – Matt Tandy

A. N/A

- **Future Meeting Dates** – Executive BOD & Conference Committee

A. Wednesday, October 12th, 2023 @ 9 AM PST via Zoom

- **Adjournment** – *Chris Matteucci – President* Adjourned 12: 30 PM