



## **CHAPTER COMPLIANCE 2023 DUE DECEMBER 1, 2023**

### **C024 SAN DIEGO CHAPTER**

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

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

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### **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**

**C024 SAN DIEGO 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

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



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### Chapter Name

San Diego

### 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



2022 SD NARPM e-Postcard ... .pdf

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



2023 SDCNARPM Financials.pdf

## 5. File Upload - Chapter Budget



16\_2023 SDCNARPM Financi... .pdf

## 6. File Upload - Membership Meetings



2023 SD NARPM Meeting (1) ....pdf



2023 SD NARPM Meeting (10)....pdf



2023 SD NARPM Meeting (2) ....pdf



2023 SD NARPM Meeting (3)... .pdf



2023 SD NARPM Meeting (4) ....pdf



2023 SD NARPM Meeting (5)... .pdf



2023 SD NARPM Meeting (6) ....pdf



2023 SD NARPM Meeting (8) ....pdf



2023 SD NARPM Meeting (9) ....pdf

## 7. File Upload - Board of Directors Meeting Minutes



2023 SD NARPM BOD Meetin....pdf

## 8. File Upload - Chapter Leadership Names



SD NARPM Notice of New Of... .pdf

## 9. File Upload - Proof of Elections



SD NARPM VOTE for BOD Jul....pdf





## Confirmation

[Home](#) | [Security Profile](#) | [Logout](#)

Your Form 990-N(e-Postcard) has been submitted to the IRS

- **Organization Name:** SAN DIEGO CHAPTER OF THE NARPM INC
- **EIN:** 800157263
- **Tax Year:** 2022
- **Tax Year Start Date:** 01-01-2022
- **Tax Year End Date:** 12-31-2022
- **Submission ID:** 10065520230446159072
- **Filing Status Date:** 02-13-2023
- **Filing Status:** Accepted

**MANAGE FORM 990-N SUBMISSIONS**

SD Chapter NARPM

Balance Sheet  
As of October 31, 2023

SD Chapter  
NARPM

Balance Sheet  
As of December 31,  
2024 **PROFORMA**

SD Chapter  
NARPM

Balance Sheet  
As of December 31,  
2024 **BUDGET**

|                                 | TOTAL       |           |           |
|---------------------------------|-------------|-----------|-----------|
| ASSETS                          |             |           |           |
| Current Assets Bank Accounts    |             |           |           |
| Checking                        | 27,382.16   | 28,751.27 | 30,188.83 |
| Merchant Services               | 1473.20     | 1,546.86  | 1,624.20  |
| PayPal                          | 0.00        | 0.00      | 0.00      |
| Total Bank Accounts             | \$28,855.36 | 30,298.13 | 31,813.03 |
| Total Current Assets            | \$28,855.36 | 30,298.13 | 31,813.03 |
| TOTAL ASSETS                    | \$28,855.36 | 30,298.13 | 31,813.03 |
| LIABILITIES AND EQUITY          |             |           |           |
| Liabilities                     |             |           |           |
| Current Liabilities             |             |           |           |
| Other Current Liabilities       |             |           |           |
| Refunds Payable                 | 0.00        |           |           |
| Total Other Current Liabilities | \$0.00      |           |           |
| Total Current liabilities       | \$0.00      |           |           |
| Total Liabilities               | \$0.00      |           |           |
| Equity                          |             |           |           |
| Unrestricted Net Assets         | 26,243.48   | 27,555.65 | 28,933.44 |
| Net Income                      | 2,611.88    | 2,742.47  | 2,879.60  |
| Total Equity                    | \$28,855.36 | 30,298.13 | 31,813.03 |
| TOTAL LIABILITIES AND EQUITY    | \$28,855.36 | 30,298.13 | 31,813.03 |

| SD Chapter NARPM<br>Profit and Loss<br>January - October 2023 |                    | SD Chapter<br>NARPM<br>Profit and Loss<br>January - December<br>2024 PROFORMA | SD Chapter<br>NARPM<br>Profit and Loss<br>January - December<br>2024 BUDGET |
|---------------------------------------------------------------|--------------------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
|                                                               | TOTAL              |                                                                               |                                                                             |
| Income                                                        |                    |                                                                               |                                                                             |
| Memberships                                                   | 10,360.00          | 10,878.00                                                                     | 11,421.90                                                                   |
| Monthly Chapter Meetings                                      | 3,940.00           | 4,137.00                                                                      | 4,343.85                                                                    |
| Total Income                                                  | \$14,300.00        | 15,015.00                                                                     | 15,765.75                                                                   |
| GROSS PROFIT                                                  | <b>\$14,300.00</b> | <b>15,015.00</b>                                                              | <b>15,765.75</b>                                                            |
| Expenses                                                      |                    |                                                                               |                                                                             |
| Advertising/Promotional                                       | 0.00               | 0.00                                                                          | 0.00                                                                        |
| Board Meetings                                                | 3,600.00           | 3,780.00                                                                      | 3,969.00                                                                    |
| Computer Software                                             | 1,350.00           | 1,417.50                                                                      | 1,488.38                                                                    |
| Corporate Filing Fees                                         |                    | 0.00                                                                          | 0.00                                                                        |
| Total Business Expenses                                       | <b>4,950.00</b>    | <b>5,197.50</b>                                                               | <b>5,457.38</b>                                                             |
| Chapter Meetings                                              | 0.00               | 0.00                                                                          | 0.00                                                                        |
| Awards                                                        |                    | 0.00                                                                          | 0.00                                                                        |
| Holiday Party                                                 |                    | 0.00                                                                          | 0.00                                                                        |
| Luncheon Expense                                              | 4,533.75           | 4,760.44                                                                      | 4,998.46                                                                    |
| Total Chapter Meetings                                        | <b>4,533.75</b>    | <b>4,760.44</b>                                                               | <b>4,998.46</b>                                                             |
| Contract Services                                             | 0.00               | 0.00                                                                          | 0.00                                                                        |
| Accounting Fees                                               | 475.20             | 498.96                                                                        | 523.91                                                                      |
| Legal Fees                                                    |                    | 0.00                                                                          | 0.00                                                                        |
| Outside Contract Services                                     |                    | 0.00                                                                          | 0.00                                                                        |
| Website                                                       | 990.00             | 1,039.50                                                                      | 1,091.48                                                                    |
| Total Contract Services                                       | <b>1,465.20</b>    | <b>1,538.46</b>                                                               | <b>1,615.38</b>                                                             |
| Operations                                                    | 0.00               | 0.00                                                                          | 0.00                                                                        |
| Insurance                                                     | 0.00               | 0.00                                                                          | 0.00                                                                        |
| Merchant Fees                                                 | 739.17             | 776.13                                                                        | 814.93                                                                      |
| PayPal Fee                                                    |                    | 0.00                                                                          | 0.00                                                                        |
| Total Operations                                              | <b>739.17</b>      | <b>776.13</b>                                                                 | <b>814.93</b>                                                               |
| Total Expenses                                                | <b>\$11,688.12</b> | <b>12,272.53</b>                                                              | <b>12,886.15</b>                                                            |
| NET OPERATING INCOME                                          | \$ 2,611.88        | 2,742.47                                                                      | 2,879.60                                                                    |
| NET INCOME                                                    | <b>\$ 2,611.88</b> | <b>2,742.47</b>                                                               | <b>2,879.60</b>                                                             |

SD Chapter NARPM

Balance Sheet  
As of October 31, 2023

SD Chapter  
NARPM

Balance Sheet  
As of December 31,  
2024 **PROFORMA**

SD Chapter  
NARPM

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As of December 31,  
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| Expenses                                                      |                    |                                                                               |                                                                             |
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## NARPM San Diego Meeting - Panel of your Peers - Facing New Challenges

NARPM San Diego Chapter &lt;president@sdnarpm.org&gt;

Thu 1/12/2023 8:39 AM

To:mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



NARPM™  
National Association of Residential Property Managers  
S A N D I E G O C H A P T E R

**Panel of your Peers - Facing New Challenges**

NARPM SAN DIEGO  
**PANEL OF YOUR PEERS**  
FACING NEW CHALLENGES

News about Fair Housing Testers and "18 Months of Outstanding Rent Growth Coming to An End"



WEDNESDAY  
JANUARY 18, 2023  
11:30AM - 1:30PM





BOB DAVIE      CHERYL CHASE BERKSON      MICHAEL BRADDON

Panel of your Peers; How are we facing the challenges and changes in our industry.

News about Fair Housing Testers and "18 Months of Outstanding Rent Growth Coming to An End"

Bring your questions!!!

Presented by Bob Davie, Cheryl Chase-Berkson & Michael Braddon.

**WHEN**  
Wednesday  
January 18, 2023

## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

REGISTER NOW

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

If you haven't been to our new meeting location now is the time to come check it out!  
Plenty of parking, large venue, sound system, views of downtown.

## MEETING LOCATION







**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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**NARPM San Diego Meeting - KTS Legal Update in Person with Tracey Merrell**

NARPM San Diego Chapter &lt;president@sdnarp.org&gt;

Thu 2/9/2023 7:42 AM

To:mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



NARPM<sup>TM</sup>  
National Association of Residential Property Managers  
S A N D I E G O C H A P T E R

KTS Legal Update in Person with Tracey Merrell

NARPM SAN DIEGO

**KTS  
2023  
Legal Updates**

Tracey Merrell, Managing Partner of  
Education for Kimball, Tirey & St. John LLP

WEDNESDAY  
FEBRUARY 15, 2023  
11:30AM – 1:30PM PST  
BANKER'S HILL CLUB



**REGISTER NOW!**

Many new laws were passed which will directly impact California residential landlords. Are you ready? Do you know what new laws will impact your rental operations in 2023?

Attorney Tracey Merrell has the information you need to make sure you are in compliance. She will also cover trending topics that are creating big challenges for owners and managers.



**Tracey Merrell** is the Managing Partner of Education for the law firm of Kimball, Tirey, and St. John. She began her career representing banks in post-foreclosure evictions throughout all 58 counties in California. As bank-owned foreclosures slowed down, she transitioned into evictions for management companies and individual owners. Tracey joined KTS as a trial attorney and has extensive experience in court, making hundreds of appearances a year since joining the firm. She is experienced in all aspects of litigation, from the development of case strategy, through discovery, depositions, motion practice, and trials including bench and jury. Tracey transitioned to the Education Department to further her goal of providing training and knowledge to both clients and staff.

## WHEN

Wednesday

February 15, 2023

NARPM Members \$20

Non-Members/Guests \$40

## WHERE

Banker's Hill Club

3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

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12:15 - 12:30 - Meeting Sponsor Speaks

12:30 - 1:30 - Spotlight Presenter Speaks

THANKS TO OUR MEETING SPONSOR



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#### MEETING LOCATION









NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER



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## NARPM San Diego - Mastermind Roundtable

NARPM San Diego Chapter &lt;president@sdnarpm.org&gt;

Fri 3/10/2023 9:27 AM

To:mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



National Association of Residential Property Managers

SAN DIEGO CHAPTER

## NARPM San Diego - Mastermind Roundtable

NARPM SAN DIEGO *Property Manager*

# MASTERMIND ROUNDTABLE

GET QUESTIONS  
ANSWERED BY YOUR  
COLLEAGUES AND  
SHARE YOUR KNOWLEDGE

Michael Braddon, Amanda Gresiak, Jason Riehl

WEDNESDAY, MARCH 15, 2023  
11:30AM - 1:30PM  
BANKER'S HILL CLUB



Get Questions answered by your colleagues and share your Knowledge.

Everyone has questions and we have a wealth of knowledge from each of our members. Michael, Jason and Amanda will be hosting the round tables. We have gathered some challenging and interesting topics to get everyone started.

We look forward to seeing you all on the 15th!

### WHEN

Wednesday  
March 15, 2023



## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

REGISTER NOW

## AGENDA

11:30 - 12:00 - Lunch & Networking  
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THANK YOU TO OUR SPONSOR

**Christian Brothers**  
Emergency Building Services

If you haven't been to our new meeting location now is the time to come check it out!  
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MEETING LOCATION





**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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## NARPM San Diego April 2023 Meeting - Surviving a DRE Audit

NARPM San Diego Chapter &lt;president@sdnarpm.org&gt;

Mon 4/17/2023 8:26 AM

To:mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



National Association of Residential Property Managers

S A N D I E G O C H A P T E R

## SURVIVING A DRE AUDIT

**SURVIVING  
A DRE AUDIT**

WEDNESDAY  
APRIL 19, 2023  
11:30AM - 1:30PM



PAM STRICKLAND

NARPM™  
National Association of Residential Property Managers  
SAN DIEGO CHAPTER

Pam Strickland is an independent compliance consultant for real estate, mortgage, escrow and property management companies. She held a California real estate salesperson license from 1980 to 1991 and has held a broker license from 1991 to the present time. She strongly suggests that companies always remain completely compliant with all laws and regulations and not wait until the auditors are knocking at their door to get things in order.





In addition to her consulting, Pam is a writer, speaker and instructor on real estate industry topics and an expert witness for real estate related litigation. She has over 40 years of real estate and mortgage experience and managed a large brokerage in Santa Barbara before becoming a full-time consultant in the early 1990's.

## WHEN

Wednesday

April 19, 2023

11:30am - 1:30pm PDT

## WHERE

Banker's Hill Club

3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

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12:30 - 1:30 - Spotlight Presenter Speaks

---

## THANKS TO OUR MEETING SPONSOR

As a 4 time consecutive NARPM National Affiliate of the Year Winner, we help our property management partners build value for their tenants, investors, and business through our Resident Benefit Package suite of services. PMs can create an average of \$180 annual revenue per door with no hard cost and little involvement. Over \$25,000,000 in total revenue was created by our PM partners in 2021. Call us and find out why Pure, Home Partners of America, and Invitation Homes trust us to manage their RBP.



If you haven't been to our new meeting location now is the time to come check it out!  
Plenty of parking, large venue, sound system, views of downtown.

#### MEETING LOCATION









**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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**NARPM San Diego Meeting - Ask the Attorney!!!**

NARPM San Diego Chapter &lt;president@sdnarpm.org&gt;

Fri 5/5/2023 5:26 AM

To:mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



National Association of Residential Property Managers

SAN DIEGO CHAPTER

**Ask the Attorney!!!**



**ASK THE ATTORNEY!**

WENDY ST JOHN

WEDNESDAY  
MAY 17, 2023  
11:30AM - 1:30PM

Wendy is back and ready for an informative Q&A!!!

**REGISTER NOW**

**Wendy is back and ready for an informative Q&A!!!**

Wendy has served as an instructor for the California State Bar's Continuing Education of the Bar classes on landlord/tenant law, and she co-authored and updated their "Action Guide: Handling Unlawful Detainers" for ten years.



**Wendy St. John** graduated from the University of Michigan with a B.S. in French. She is a graduate of the University of San Diego School of Law. Wendy has been a trial attorney since 1984 and became a Senior Partner at with Kimball, Tirey & St. John LLP in 1990. She specializes in representing owners and managers of real property and has been a trial attorney for many years. Her litigation experience includes thousands of court trials, jury trials, as well as arbitrations and mediations. Her expertise includes residential, commercial, and post-foreclosure evictions as well as breach of lease matters. Wendy has served as an instructor for the California State Bar's Continuing Education of the Bar classes on landlord-tenant law, and she co-authored and updated their "Action Guide: Handling Unlawful Detainers" for ten years. She has been listed as a Top Attorney in Landlord-Tenant Law in San Diego Magazine on numerous occasions and served as a former Board Member with the California Apartment Association, San Diego Division. Currently, Wendy serves on the San Diego Housing Commission's Landlord-Advisory Committee, as well as on Southern California Rental Housing Association's Legislative Committee.

## WHEN

Wednesday  
May 17, 2023

## WHERE

Banker's Hill Club  
3030 Front Street  
San Diego, CA 92103

[LOCATION INFO](#)

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12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

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#### MEETING LOCATION









NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER



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## NARPM San Diego Meeting - The Chula Vista and San Diego Tenant Ordinances

NARPM San Diego Chapter &lt;president@sdnarp.org&gt;

Mon 6/12/2023 3:45 PM

To:mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



National Association of Residential Property Managers

S A N D I E G O C H A P T E R

## The Chula Vista and San Diego Tenant Ordinances

NARPM SAN DIEGO

# The Chula Vista and San Diego Tenant Ordinances

PRESENTED BY MARK SCOTT

WEDNESDAY  
JUNE 21, 2023

11:30am - 1:30pm

Banker's Hill Club



### An Overview and Discussion for Housing Providers

Discussion topics:

- Applicability of the new ordinances
- New noticing requirements
- New requirements for termination of tenancy
- Administrative regulations



## WHEN

Wednesday

June 21, 2023

11:30am - 1:30 pm PDT

## WHERE

Banker's Hill Club

3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking

12:00 - 12:15 - Meeting Open & Chapter Updates

12:15 - 12:30 - Meeting Sponsor Speaks

12:30 - 1:30 - Spotlight Presenter Speaks

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MEETING LOCATION







**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
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## NARPM San Diego August Meeting - Mastermind Roundtable

NARPM San Diego Chapter &lt;president@sdnarp.org&gt;

Thu 8/10/2023 7:15 AM

To:mbraddon@hotmail.com &lt;mbraddon@hotmail.com&gt;



The graphic features the NARPM logo at the top, which consists of a stylized house icon with a blue roof and red walls, followed by the text 'NARPM™'. Below this is the text 'National Association of Residential Property Managers' and 'S A N D I E G O C H A P T E R'. A red banner contains the text 'NARPM San Diego - Mastermind Roundtable'. The main body of the graphic has a dark blue background with a lightbulb in the center. Text on the graphic includes 'NARPM SAN DIEGO CHAPTER', 'MASTERMIND ROUNDTABLE', 'WEDNESDAY, AUGUST 16, 2023', '11:30AM - 1:30PM PT', 'BANKERS HILL CLUB', and a small NARPM logo in the bottom right corner.

Get Questions answered by your colleagues and share your Knowledge.

Everyone has questions and we have a wealth of knowledge from each of our members. Mark, Michael, Jason and Amanda will be hosting the round tables. We have gathered some challenging and interesting topics to get everyone started.

We look forward to seeing you all on the 16th!

**WHEN**  
Wednesday  
August 16, 2023

**WHERE**  
Banker's Hill Club  
3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

[REGISTER NOW](#)

## AGENDA

11:30 - 12:00 - Lunch & Networking  
12:00 - 12:15 - Meeting Open & Chapter Updates  
12:15 - 12:30 - Meeting Sponsor Speaks  
12:30 - 1:30 - Spotlight Presenter Speaks

---

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MEETING LOCATION





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SAN DIEGO CHAPTER**



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## NARPM San Diego Sept Meeting - What is the Rental Market Outlook from the Professionals

NARPM San Diego Chapter <president@sdnarp.org>

Tue 9/12/2023 8:55 AM

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



National Association of Residential Property Managers

SAN DIEGO CHAPTER

### What is the Rental Market Outlook From the Professionals

## WHAT IS THE RENTAL MARKET OUTLOOK FROM THE PROFESSIONALS

**WEDNESDAY**  
SEPTEMBER 20, 2023  
11:30AM - 1:30PM  
BANKER'S HILL CLUB



**Nathan Moeder**

As a Partner of London Moeder Advisors, Nathan serves as a strategic consultant who advises a wide array of clients from the perspective of real estate economics.





Nathan Moeder is widely considered one of the west coast's foremost authority on the financial feasibility of real estate projects. As a Partner of London Moeder Advisors, he serves as a strategic consultant who advises a wide array of clients from the perspective of real estate economics. His clients include real estate developers, investors, corporations, financial institutions, businesses and public agencies. Project assignments span all real estate sectors including residential developments, office buildings, industrial, hotel, retail and mixed-use projects. He brings extensive experience and financial expertise as an advisor and analyst to many successful projects and assignments throughout North America.

Mr. Moeder is a real estate finance, investment and valuation expert. His experience in the finance realm ranges from working with institutional Wall Street firms on international deals to small entrepreneurial investment groups. He specializes in market analysis, evaluating project feasibility and acquisition strategies, as well as structuring joint ventures and debt layers for projects.

## WHEN

Wednesday

September 20, 2023

11:30am - 1:30pm

NARPM Members: \$20

Non-Members/Guests \$40

## WHERE

Banker's Hill Club

3030 Front Street

San Diego, CA 92103

[LOCATION INFO](#)

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## AGENDA

11:30 - 12:00 - Lunch & Networking

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12:15 - 12:30 - Meeting Sponsor Speaks

12:30 - 1:30 - Spotlight Presenter Speaks

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#### MEETING LOCATION





**NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS  
SAN DIEGO CHAPTER**



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## Insurance - Hear from a Respected Independent Broker & Underwriter

NARPM San Diego Chapter <president@sdnarpm.org>

Mon 10/9/2023 9:24 AM

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



## INSURANCE - HEAR FROM A RESPECTED INDEPENDENT BROKER & UNDERWRITER

**October 18, 2023 | 11:30 AM To 1:30 PM | Banker's Hill Club**

Insurance is constantly changing! Hear from a respected independent Broker & Underwriter.

[View More Details](#)

**REGISTER NOW**

Members \$20

Non-Members/Guests \$40

**About Curt Bulloch**



Independent Insurance Broker-Specializing in Insurance for Property Managers, 8 Time  
Cal Narp Panel Discussion leader, B.S. Finance, past risk management positions with:  
Moody's Ratings, Standard & Poor's, IBM, Moringstar, Hemscott PLC.

### AGENDA

11:30 - 12:00 - Lunch & Networking  
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---

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# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES February 3, 2023

### **NARPM® ANTITRUST STATEMENT:**

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### **1. Roll Call :**

Michael Braddon (President) Jason Riehl (Treasurer),  
Mark Scott (Past President), Amanda Gresiak (Secretary) and Julie Kern (Affiliate Chair)

### **2. Follow up on Upcoming Speakers:**

February – KTS Legal Update- Confirmed  
March – Mastermind Roundtable  
April – Pam Strickland - Confirmed  
May – Ask the Attorney – Wendy St John - Confirmed  
June – Chula Vista & San Diego Tenant Ordinances – Mark W Scott  
July – Dark

### **3. Ideas for future meeting topics:**

- Master Roundtable
- Rental Market Outlook – Nathan Moeder
- Insurance Update – Curt Bulloch

### **4. Treasurer (membership fees):**

Jason sent a reminder email to the membership reminding them of the fees.

### **5. Adjourned**



# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES & BOD ELECTIONS August 16, 2023

### **NARPM® ANTITRUST STATEMENT:**

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### **1. Roll Call :**

Michael Braddon (President) Jason Riehl (Treasurer),  
Mark Scott (Past President), Amanda Gresiak (Secretary) and Julie Kern (Affiliate Chair)

### **2. Discuss and reaffirm vote for VA access to the website & collect information:**

Michael Braddon called for a vote; unanimous vote was yes.

### **3. Discuss and Vote to confirm elected 2023-2024 Board of Directors:**

**President, Michael Braddon, Thomas Perfect as New President Elect, Jason Riehl as Treasurer, Mark Scott as Past President, Chritina Rounds as New Secretary and Danyel Brooks as Member Mentory**

After discussion Michael Braddon called for a vote, unanimous vote; **effective July 1, 2023.**

*NOTE: The complication with the COVID-19 pandemic has made finding new leadership complicated and sincere effort has been made to find qualified motivated new leadership for President, Treasurer and Secretary for the 2023-2024 BOD.*

### **4. Treasurer Report (Jason Riehl):**

Form 3500 reinstatement needed for being a non-profit organization; get us compliant with CA-FTB; Online postcard 199N will get us compliant (State SOI)

### **5. Board Communication and Upcoming Calls**

### **6. Adjourned**



# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES October 2, 2023

### **NARPM® ANTITRUST STATEMENT:**

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#### **1. Roll Call :**

Jason Riehl (Treasurer), Amanda Gresiak (Secretary) , Michael Braddon (Interim President), and not in attendance: , Thomas Perfect (President Elect), Chritina Rounds (New Secretary) Julie Kern (Affiliate Chair) and Mark W Scott (Past President)

#### **2. Continued discussion about 2023-2024 New Board of Directors (BOD):**

Acknowledged:

Jason Riehl (Treasurer) has served 2018, 2019,2020,2021 and now 2022-2023

**NOTE: Michael Braddon, after completing President's role in June 2023, will step up to be the new Treasurer in July 2024.**

**Amanda (former Secretary) has sold her company and has resigned from NARPM. We wish Amanda well and success on her new journey !!**

#### **3. NARPM National meeting in Atlanta October 2024:**

Michael Braddon will be attending on behalf of San Diego NARPM Chapter

#### **4. Board Communication and Upcoming Calls**

#### **5. Adjourned**





# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES December 1, 2023

### **NARPM® ANTITRUST STATEMENT:**

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### **1. Roll Call :**

Jason Riehl (Treasurer), Michael Braddon (Interim President), Thomas Perfect (President Elect), Chritina Rounds (New Secretary) Julie Kern (Affiliate Chair) and not in attendance: Mark W Scott (Past President)

### **2. Follow up on Upcoming Speakers for 2024:**

January – Panel of Owner/Brokers: Mark W. Scott / Cheryl Chase-Berkson / Bob Davie  
February – Tracey Merrell KTS  
March – Round Tables  
April – Pam Strickland - Confirmed

### **3. Plans for Holiday Party December 14th:**

Catered Party at the Banker's Hill Club. Michael called for vote: unanimous.

### **4. Board Communication and Upcoming Calls**

### **5. Adjourned**



# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES February 3, 2023

### **NARPM® ANTITRUST STATEMENT:**

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- Master Roundtable
- Rental Market Outlook – Nathan Moeder
- Insurance Update – Curt Bulloch

### **4. Treasurer (membership fees):**

Jason sent a reminder email to the membership reminding them of the fees.

### **5. Adjourned**



# SD NARPM

## San Diego National Association of Residential Property Managers BOARD MEETING MINUTES & BOD ELECTIONS August 16, 2023

### **NARPM® ANTITRUST STATEMENT:**

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**President, Michael Braddon, Thomas Perfect as New President Elect, Jason Riehl as Treasurer, Mark Scott as Past President, Chritina Rounds as New Secretary and Danyel Brooks as Member Mentory**

After discussion Michael Braddon called for a vote, unanimous vote; **effective July 1, 2023.**

*NOTE: The complication with the COVID-19 pandemic has made finding new leadership complicated and sincere effort has been made to find qualified motivated new leadership for President, Treasurer and Secretary for the 2023-2024 BOD.*

#### **4. Treasurer Report (Jason Riehl):**

Form 3500 reinstatement needed for being a non-profit organization; get us compliant with CA-FTB; Online postcard 199N will get us compliant (State SOI)

#### **5. Board Communication and Upcoming Calls**

#### **6. Adjourned**

## Rebecca Woodring

---

**From:** Michael Braddon <michael@orionmrinc.com>  
**Sent:** Wednesday, November 29, 2023 6:17 PM  
**To:** Rebecca Woodring  
**Cc:** Thomas Perfect (thomas@upliftpm.com); Christina Rounds (christina@collectiveprops.com); jason@redhousemgmt.com; Mark Scott  
**Subject:** RE: 2024 San Diego NARPM Chapter Officers [UPDATED]

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

### Member Mentor -

Danyel Brooks  
4455 Murphy Canyon Rd. #100-72  
San Diego, CA. 92123  
Bus: (858) 222-4663  
Email: [danyel@bpmsd.com](mailto:danyel@bpmsd.com)

**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](mailto: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 2:16 PM  
**To:** Michael Braddon <michael@orionmrinc.com>

**Cc:** Thomas Perfect (thomas@upliftpm.com) <thomas@upliftpm.com>; Christina Rounds (christina@collectiveprops.com) <christina@collectiveprops.com>; jason@redhousemgt.com; Mark Scott <msscott@encorerealtysd.com>

**Subject:** RE: 2024 San Diego NARPM 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](mailto: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](http://www.narpm.org)

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**From:** Michael Braddon <[michael@orionmrinc.com](mailto:michael@orionmrinc.com)>

**Sent:** Tuesday, November 14, 2023 2:51 PM

**To:** Rebecca Woodring <[rwoodring@managegroup.com](mailto:rwoodring@managegroup.com)>

**Cc:** Thomas Perfect ([thomas@upliftpm.com](mailto:thomas@upliftpm.com)) <[thomas@upliftpm.com](mailto:thomas@upliftpm.com)>; Christina Rounds ([christina@collectiveprops.com](mailto:christina@collectiveprops.com)) <[christina@collectiveprops.com](mailto:christina@collectiveprops.com)>; [jason@redhousemgt.com](mailto:jason@redhousemgt.com); Mark Scott <[msscott@encorerealtysd.com](mailto:msscott@encorerealtysd.com)>

**Subject:** RE: 2024 San Diego NARPM Chapter Officers

Rebecca,

San Diego NARPM Chapter July 2023 – June 2024

I wanted to confirm the 2023 - 2024 Chapter Officers:

Michael Braddon, returning President

Thomas Perfect, President Elect

Mark W Scott, Past President

Christina Rounds, Secretary

Jason Riehl, returning Treasurer

Please note we will hold elections next June 2024 and I will taking the role of 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](mailto: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 2022-2023  
San Diego NARPM Chapter President 2016-17; Interim President 2022-2023

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**From:** Rebecca Woodring <[rwoodring@managegroup.com](mailto: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](mailto: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 |

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## Michael Braddon

---

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**Sent:** Wednesday, November 29, 2023 3:17 PM  
**To:** Rebecca Woodring  
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**Subject:** RE: 2024 San Diego NARPM Chapter Officers [UPDATED]

### Member Mentor -

Danyel Brooks  
4455 Murphy Canyon Rd. #100-72  
San Diego, CA. 92123  
Bus: (858) 222-4663  
Email: [danyel@bpmsd.com](mailto:danyel@bpmsd.com)

**Michael Braddon, MBA, GRI**  
**President / Principal Broker**  
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1210 28th Street  
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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 2:16 PM  
**To:** Michael Braddon <michael@orionmrinc.com>  
**Cc:** Thomas Perfect (thomas@upliftpm.com) <thomas@upliftpm.com>; Christina Rounds (christina@collectiveprops.com) <christina@collectiveprops.com>; jason@redhousemgt.com; Mark Scott

<mscott@encorerealtysd.com>

**Subject:** RE: 2024 San Diego NARPM 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](mailto: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 |

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**From:** Michael Braddon <[michael@orionmrinc.com](mailto:michael@orionmrinc.com)>

**Sent:** Tuesday, November 14, 2023 2:51 PM

**To:** Rebecca Woodring <[rwoodring@managegroup.com](mailto:rwoodring@managegroup.com)>

**Cc:** Thomas Perfect (<[thomas@upliftpm.com](mailto:thomas@upliftpm.com)> <[thomas@upliftpm.com](mailto:thomas@upliftpm.com)>); Christina Rounds (<[christina@collectiveprops.com](mailto:christina@collectiveprops.com)> <[christina@collectiveprops.com](mailto:christina@collectiveprops.com)>); [jason@redhousemgmt.com](mailto:jason@redhousemgmt.com); Mark Scott <[mscott@encorerealtysd.com](mailto:mscott@encorerealtysd.com)>

**Subject:** RE: 2024 San Diego NARPM Chapter Officers

Rebecca,

San Diego NARPM Chapter July 2023 – June 2024

I wanted to confirm the 2023 - 2024 Chapter Officers:

Michael Braddon, returning President

Thomas Perfect, President Elect

Mark W Scott, Past President

Christina Rounds, Secretary

Jason Riehl, returning Treasurer

Please note we will hold elections next June 2024 and I will taking the role of Treasurer.

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

Thanks,

Michael

**Michael Braddon, MBA, GRI**

**President / Principal Broker**  
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**From:** Rebecca Woodring <[rwoodring@managegroup.com](mailto: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](mailto:rwoodring@narpm.org)

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| Respondent                                     | Date Submitted  | San Diego I | Do you have a Nomination for President-Elect or Secretary for 2023-2024? |
|------------------------------------------------|-----------------|-------------|--------------------------------------------------------------------------|
| Thomas Perfect                                 | 10/2/2023 11:42 | Yes         |                                                                          |
| Bob Davie                                      | 9/29/2023 19:04 | Yes         | No                                                                       |
| Kayla Roeder                                   | 9/29/2023 18:45 | Yes         |                                                                          |
| San Diego NARPM Member wishing to be anonymous | 9/29/2023 18:33 | No          | A big NO on Michael Braddon!                                             |
| Mark W Scott, RMPC                             | 9/29/2023 18:25 | Yes         |                                                                          |
| Tammy Matthews                                 | 9/28/2023 18:32 | Yes         | Mark W. Scott                                                            |
| Cheryl R Chase-Berkson                         | 9/25/2023 19:00 | Yes         |                                                                          |
| Daniel Recob                                   | 9/25/2023 12:50 | Yes         |                                                                          |
| Rusty Hannum                                   | 9/23/2023 18:41 | Yes         | No                                                                       |
| Peter Carlseen                                 | 9/23/2023 18:03 | Yes         |                                                                          |
| Paul Kankowski                                 | 9/23/2023 16:51 | Yes         |                                                                          |
| Michael Braddon                                | 9/23/2023 15:00 | Yes         | NONE                                                                     |