

## **PORTFOLIO PROCESS OVERVIEW for CANDIDATES**













**Next Portfolio Deadline JANUARY 12, 2024**

Contact an **Official Chapter Representative** for your **MANDATORY CHAPTER RECOMMENDATION ASAP**  
The Holidays are upon us so get the Recommendation Process started as soon as you can.

BARBARA ANN MONAHAN, CCIM <i>Chapter Recommendation Coordinator</i>	239)-370-0229	<a href="mailto:bamonahan@ccim.net">bamonahan@ccim.net</a>
TINA MARIE ELOIAN, CCIM	(813) 997-4321	<a href="mailto:tina@floridacommercialgroup.com">tina@floridacommercialgroup.com</a>
SANDRA KAHLE, CCIM	(904) 838-6446	<a href="mailto:skahle@kwcommercial.com">skahle@kwcommercial.com</a>
STEPHEN RIGL, CCIM	(305) 546-6933	<a href="mailto:stephenrigr@gmail.com">stephenrigr@gmail.com</a>
Chepe JOSE MARIE SERRANO, CCIM	(305) 283-0492	<a href="mailto:chepe@ccim.net">chepe@ccim.net</a>
WILLIAM WILSON, CCIM	(239) 691-4249	<a href="mailto:william@ffcfc.com">william@ffcfc.com</a>
CHRISTY KURTZ CLARK, CCIM	(352) 223-0817	<a href="mailto:Cclark@srdcommercial.com">Cclark@srdcommercial.com</a>

*These 7 Representatives are the ONLY CCIMs who are designated to do the Florida Recommendations*

**The Chapter Recommendation Process is Not just the Form  
and IS A MANDATORY PART OF YOUR PORTFOLIO**

-  **DO NOT Hit SUBMIT on your Portal Until the Recommendation is Done**
-  **We Assist you get your Portfolio right the first time**
-  **Send us what is going in your portfolio portal.**
-  **We check “if you qualify, have all Requirements and find mistakes so the Grader doesn’t**
-  **Recommendations need to be Requested AT LEAST 2 weeks Before the Deadline.**
-  **Graders don’t know you – Don’t Skip Details particularly on the Streamlined.**
-  **Graders depend on Chapter Recommendations to know you and what you do**
-  ***The better your Submittal & Recommendation are, the less questions they may have. If they do, they may call you or others for clarification***
-  ***ONLY 7 Florida designated Chapter Representative do these Recommendations***
-  **We want to know our Candidates and have them know us - FLCCIM**  
**Chapter, your local District and the Designees.**
-  **Join the FL Chapter if you haven’t already. So many Benefits and**
-  **ONLY FL Chapter Members receive Special Gifts when they become New CCIM Designees.**

## **INFORMATION CANDIDATES SEND REPRESENTATIVES FOR THE RECOMMENDATION**

1. **Which Portfolio Type** you are submitting? **Traditional, Streamlined or Streamlined NON-Transactional.** *Read Carefully to choose the correct one and ASK Rep if you are not certain*
2. Please send the **Form** for the Chapter Recommendation **with your name and the date** to the Reviewer.
3. Send your Completed **Application**. – **Signed!**
4. Your **Professional Resume of Real Estate Experience** –
5. Your **Summary of Activities, Transactions, Projects or Work Product**. (List Newest 1st )
6. Your **Activity Data Forms** for **Each** Activity if Required (for a **Traditional Portfolio**).
  - a. And for a Streamlined AFTER February 1, 2024
7. The **Transactions/Activities/etc** you are submitting.
8. **Traditional Portfolio, 2 Strong proofs.** (*This is one of the main reasons for Disapprovals*)
9. If you need to write description for your submittal, please send to Rep *Unique/No Cut & Paste*)
10. **Verification of employment**
11. Please **Do Not Submit** your Portfolio **until after** the Representative has sent the Recommendation to the Institute
12. Have you successfully completed all your **core courses**? All **Other Requirements**? **Online Ethics Course**?  
*You may be able to take a core course after you submit your Portfolio, you will need to contact the Institute.*
13. Remember **ONLY** the following wording may be used when referring to your candidacy! And **only in your Resume**. Any other use, reference, or logo to the CCIM Designation is a violation  
**“(Your Name) has become a Candidate Member of the CCIM Institute and is pursuing the Certified Commercial Investment Member (CCIM) Designation conferred by the organization ”**

Many times, the Chapter Representative will catch little mistakes that could cause a **Disapproval** (30 days to Correct) **Unqualified** must Resubmit! *We try to assist you in being **Approved** the first time.*

### **Streamlined Portfolios – Important!**

On the Summary Activity Sheet: Expand the **NOTES or FURTHER DETAIL on PROJECT or PROPERTY** Block and include Information on: What you did, Did you CoBroke? w/Who?, and add other Information about the Property or Project. *Graders have said this is the weakest area of the Streamlined Submissions and they will be looking carefully at this information.*

**New Requirements will be put in place February 1 for future Streamline Portfolios**

*Barbara Ann Monahan, CCIM*

2023 – 2024 Chapter Chair Candidate Development  
Chapter Recommendation Coordinator

**[bamonahan@ccim.net](mailto:bamonahan@ccim.net)**