

Florida CCIM Chapter

Policies & Procedures Manual

Approved at the Board of Director's Meeting 082015

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I. SERVICE PROVIDERS

A. Association Management Company/Chapter Administrator

Administrative services to the Chapter will be provided on a contract basis by either an association management company (AMC) or a Chapter Administrator. The Chapter Administrator shall have the official title of "Florida CCIM Chapter Administrator". The current Chapter Administrator is:

DeeDee Steinbeck
1631 Rock Springs Rd. #115
Apopka, FL 32712

B. Chapter Administrator Services

The Chapter Administrator shall provide the following services:

- Provide general correspondence, answer telephone inquiries, provide information to Chapter membership and answer inquiries on an as-needed basis.
- Maintain files, records and any other documents relative to the daily operation of the Chapter.
- Maintain or coordinate the maintenance of a membership database.
- Arrange for and attend Board of Directors, Committee conference calls, executive Committee meetings and any other meetings as deemed necessary by the Executive Committee.
- Act as liaison between Committee chairs and District Presidents and Chapter leadership.
- Coordinate Chapter meetings and events.
- Work with Membership Chair to promote new memberships and retain existing members.
- Help solicit sponsorships for the Chapter
- Prepare monthly membership reports
- Any and all other services reasonably required by the Executive Committee
- As needed, submit any changes to Chapter by-laws and standard operating procedures to membership in a timely manner.

C. Bookkeeper

Bookkeeping services shall be provided to the Chapter by a professional third-party bookkeeper on a contracted basis. The current Chapter bookkeeper is:

Financial Solutions of Tampa
4522 West Village Drive Unit 556
Tampa, FL 33624

D. Bookkeeping Services

The bookkeeper shall provide the following services:

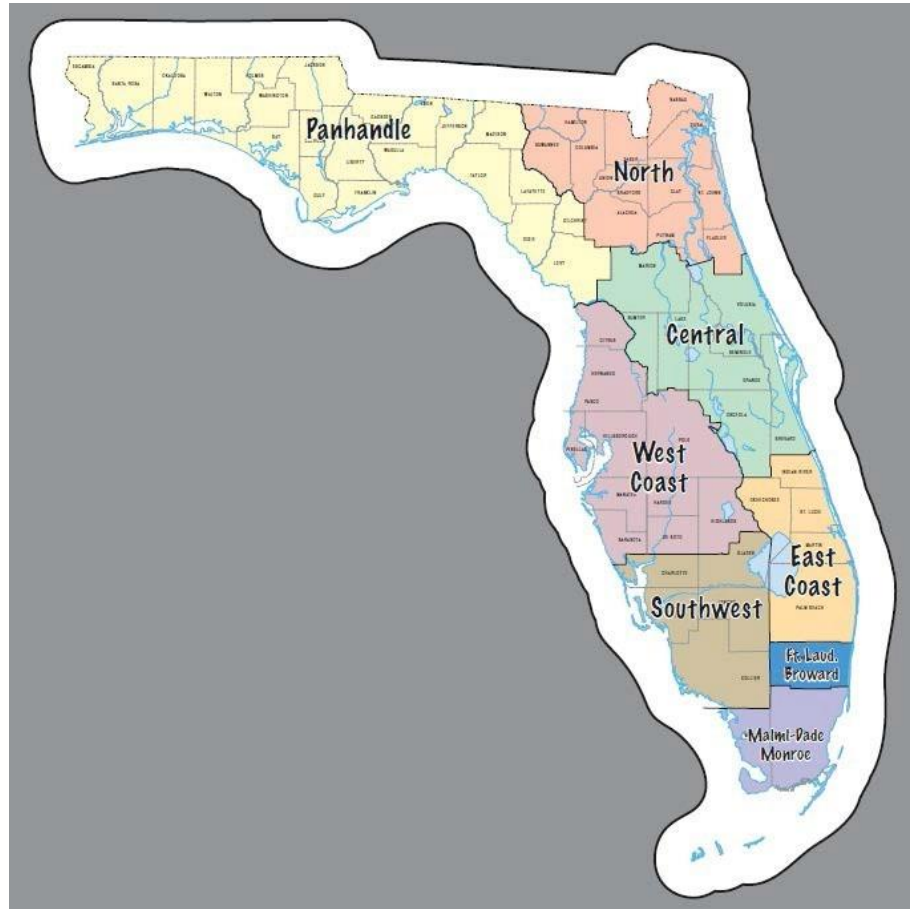
- Provide financial management and guidance to include maintenance of Chapter and District books, preparation of financial statements, and operations of bank accounts.
- Send financial statements to Chapter and District leadership on a monthly basis.
- Any and all other bookkeeping services as included in an executed contract between bookkeeper and the Chapter.

II. DISTRICTS

A. District and Jurisdictions

The Florida Chapter Board of Directors shall establish Districts within the jurisdiction of the Chapter and define their boundaries. The established Districts are as follows:

- Central
- East Coast
- Ft Lauderdale-Broward
- Miami-Dade/Monroe
- North
- Panhandle
- Southwest
- West Coast



B. New District Creation

New Districts may be formed by any group of fifteen (15) or more Designees and Institute Candidate members of the Chapter. The potential new District may petition the Board of Directors to form a District within the Chapter. The Board of Directors may authorize the establishment of such Districts by adopting a resolution which provides for its name and jurisdictional boundaries. The new District shall be subject to the Chapter Bylaws, the Florida Chapter Policies and Procedures, the method of conducting its affairs, the submission of periodic reports on its activities to the Florida Chapter Board of Directors and the appointment of a temporary Committee to arrange for the organizational meeting of the District. The former District and the new District must present a plan for the formation of the new District including geography and division of funds to the Chapter Board of Directors for approval.

C. District Business Plans

Each fall each District President will prepare a business plan that has been approved by their District Board of Directors and in accordance with the Florida Chapter Bylaws and Policies and Procedures and submit it to the Chapter President Elect and the Chapter Vice President of Operations at least 30 days prior to the Chapter Leadership Training meeting. The District Business Plan will include a narrative of the plans for the coming year, a budget, a budget narrative and a list of the coming year's District officers.

III. OFFICERS – DUTIES, ELECTIONS AND RESPONSIBILITIES

A. Duties/Responsibilities:

The minimum duties of each officer are as follows:

- **President** – The Chapter President is the chief executive officer of the Chapter, appoints all Committee chairs and at-large Board of Director members, with the advice and consent of the Executive Committee and ratification by the Board of Directors at the Winter Meeting. The Chapter President presides at all meetings of the Board of Directors and shall be an ex-officio member of all Chapter Committees, except the Past Presidents Council and the Nominating Committee.
- **President Elect** – The Florida Chapter President Elect shall be responsible for overseeing all Chapter Committees as directed by the President and the Board of Directors and should conduct the monthly Chapter Committee conference call. The Chapter President Elect will provide reports to the Executive Committee on the Committee activities which have impacted the Districts on the monthly District Presidents call. The President Elect shall oversee Committee expenditures and make certain they stay within their budget and/or make requests on behalf of the Committees for additional funding when necessary. Should the president resign or be unable to complete the term of office, the President Elect will assume that office.
- **Vice President Finance** – The Vice President Finance is responsible for overseeing the receipt, safekeeping and disbursement of all Chapter funds, and is responsible for preparation of budgets, maintaining complete records of all financial transactions of the Chapter, reviewing periodic financial reports, collection of all dues and overseeing the preparation of tax returns. This officer shall chair the Finance Committee.
- **Vice President Chapter Operations** – The Vice President Chapter Operations shall be responsible for overseeing the District Presidents as directed by the President and the Board of Directors and should be on the monthly Executive Committee conference call and report to the Presidents of the Districts the Executive Committee activities which impact the Districts on the monthly District Presidents call.
- **Vice President Administration** – The Chapter Vice President Administration is generally tasked with working with the association management company/Chapter Administrator regarding Chapter meetings and events. This position is also the point of contact for By-Laws and Policies and Procedures issues. This officer shall be responsible to ensure a written notice of each meeting of the Board of Directors is provided to the Board members not less than ten (10) days prior to each such meeting.
This officer shall be responsible for Chapter elections and directing the Chapter Administrator to provide the Institute with the names of the newly elected Chapter Officers no later than November 1 or thirty (30) days after the date of election, whichever occurs first. Also, the VP Administration will also be a part of all task forces formed as to be the liaison for communication for the Chapter's benefit. This officer shall be responsible for overseeing the maintenance of all records, conducting correspondence, overseeing the minutes and submitting various reports as

required; specifically including membership records, Chapter meeting reports, correspondence files and reports, and file maintenance. This officer shall serve as the Chapter's corporate secretary.

- **Vice President Education** – The Vice President Education is responsible for overseeing all education and associated services to our current and potential members. This includes, but is not limited to, CCIM classes, road shows, education task forces, the Scholarship Committee, and the Candidate Development Committee. This position shall be chaired for two (2) consecutive years with the second year having a co-chair who will become the Chair for the next 2 year term.
- **District President** – The District Presidents shall be responsible for operating their respective Districts as directed by the Chapter President, the Chapter Vice President Operations, the Chapter Executive Committee, the Chapter Board of Directors, the Policies and Procedures and the Bylaws of the Chapter. This position shall be a member of the Chapter Board of Directors.
- **District President Elect** – The District President Elect shall learn the responsibilities of the District President by assisting the District President in fulfilling the duties of the office. At the end of the term, the District President-Elect shall be automatically considered for the office of District President for the following year. In the event the District does not have this position or anyone in this position, the Vice President shall be considered the President Elect.
- **Regional Vice President** – If the Regional Vice President is to come from the Chapter, the Immediate Past President shall fill this position, however, if this person is unwilling or unable to serve, then the Chapter Executive Committee shall appoint a replacement. The replacement must be a past president of the Florida Chapter who currently meets the qualifications of membership in the Institute. This Institute officer shall be the official voting representative of Region 8 at national CCIM Institute meetings and shall vote as directed by the Board of Directors and/or the Executive Committee. The Regional Vice President will serve on the Chapter's Board of Directors during the year they serve as Regional Vice President. **Regional First Vice President** – If the Regional First Vice President is to come from the Chapter, then the Chapter President shall fill this position. This Institute officer shall be the official back up to the Regional Vice President for Region 8 at national CCIM Institute meetings. Should this Institute officer be required to vote on Institute issues for Region 8 then this person shall vote as directed by the Board of Directors and/or the Executive Committee.
- **Institute Member** – This member is the Executive Vice President of the CCIM Institute. They are an ex-officio member of the Chapter Board of Directors

B. Installation of Officers:

The elected Chapter Officers shall be duly installed by the appropriate officer of either the National Association of Realtors®, the CCIM Institute, the Florida CCIM Chapter or the Florida Realtors® at the Winter Meeting or as soon as possible thereafter. The elected officers shall assume their official duties as of January 1st.

C. Nominations:

Notice shall be sent to all eligible Chapter members requesting their nominations for leadership positions for the upcoming election year by the Nominating Committee Chair pursuant to the Chapter Bylaws.

In the event a member of the Nominating Committee is nominated for an officer position, that member shall recuse themselves from the Nominating Committee to avoid a conflict of interest and either the Chapter President or the Nominating Committee Chair shall appoint a replacement. The Nominating Committee will take into consideration whether nominees for President-Elect have attended the Jay W. Levine Leadership Academy.

IV. CHAPTER COMMITTEES

A. Committee Budget Allocations

All chairs of Chapter Committees for the coming year shall submit to the Chapter President Elect and the next year's Chapter Vice President Finance their requested draft budgets 30 days prior to the Chapter Leadership Training. The Chapter President Elect along with the Chapter Vice President Finance shall work with the Chapter Committee chairs to prepare a recommended Chapter Budget for review of the next year's Executive Committee. The Executive Committee shall review and approve the budget for submission to the Board of Directors at least 30 days prior to the Winter Meeting. The Board of Directors shall approve a final budget at the Winter Meeting. Chapter Winter and Summer meetings will coincide with the time and place of the FAR Winter and Summer meetings, unless otherwise designated by the Chapter BOD.

Once the Board of Directors has approved the current year's budget, a request by the chairs through the President will have to be approved by the Executive Committee prior to any expenditure over those budgeted.

Only the Executive Committee shall have the right to authorize expenditures from a Committee's budget without the approval of the Committee chair.

B. Committee Membership and Tenure

Members of Chapter Committees shall serve for a term of one year. The number of members on each Committee shall be determined by the President with the advice and consent of the Executive Committee, but no Committee shall have less than two (2) members. The corresponding District Committee chairs shall automatically be a member of the state Committee and shall be kept informed of all Committee activities. With the consent of the majority of the Executive Committee, the President shall have the authority to replace any Committee chair.

C. Special Committees

Each Special Committee and the terms of all members thereof shall expire automatically on the anniversary date of its creation or when its purpose has been accomplished, whichever comes first.

D. Committee Goals

In the fall of each year, each Committee will draft its goals for the coming year and submit them to the President Elect and Vice President Operations for presentation at the Leadership Training meeting.

E. Committee Descriptions

Candidate Development – This Committee is responsible for educating the Institute Candidate membership and assisting Institute Candidates in the pursuit of the CCIM Designation through answering questions and clarifying requirements. The Committee will hold Candidate Guidance Workshops to assist in achieving this goal. The Chair, and Vice Chair or Co-Chair shall serve as the Chapter representative and oversee the Chapter's recommendations as the Institute Designation Committee requires. Expense Code 5431

Communication/Newsletter – This Committee is charged with encouraging and enhancing ongoing dialog between the entire Chapter membership and communicating Chapter activities to all membership and Districts. As a committee they will oversee all direct communication to members from the Chapter. Expense Code 5418

Commercial Alliances – This Committee will strive to elevate the affiliate relationships and awareness with the state affiliates; within product type disciplines such as retail, office, industrial, investments and

land, with specially affiliates such as ICSC, IREM, ULI, NAIOP, NAREIT, etc. Whoever chairs this Committee shall be a member of the Commercial Alliance Committee of Florida REALTORS. Expense Code 5420

Designation Promotion – This Committee will strive to promote the CCIM designation through all media by maintaining good relations with the media, promoting stories on CCIM, placing advertising and any other means that brings positive attention to the designation. Expense Code 5430

Education Committee – This Committee is chaired by the Vice President Education and is responsible for providing relevant and topical education programs to the membership and real estate community. It plans and executes with the Districts the statewide Licensed Delivery of the CCIM Institute courses including the contract negotiations with the CCIM Institute and instructors. Additional education courses shall be conducted by the Districts. Expense Code 7045

Finance Committee – This Committee is chaired by the Chapter Vice President Finance and made up of the District Treasurers. This committee is generally tasked with formulating a fiscally sound operating budget based upon the Chapter's anticipated income and expenditures in the upcoming year. This Committee monitors the financial health of the organization during the year. A Vice Chair will be appointed by the Executive Committee or VP Finance. Expense Code 5413

Legislative – This Committee will monitor proposed legislation and rules and regulations being promulgated by local, county, state and federal governments, boards and commissions that impact the real estate industry and keeping the membership informed of such. The Committee may initiate or support calls-to-action by real estate affiliated entities. Expense Code 5421

Marketing – This Committee will plan and organize networking events at the state level at which members can socialize with and market commercial properties to members and the public. It also plans and organizes the marketing of properties of members through holding marketing sessions. Expense Code 5419

Membership – This Committee is responsible for monitoring the membership numbers of the Chapter and conducting membership campaigns and recruitment to expand the Chapter. It will supervise the maintenance of the membership list provided by the Institute and maintained by the Chapter. Expense Code 5415

Nominating – This Committee is chaired by the immediate past president once removed. The Committee's members are appointed by the current President pursuant to the By-Laws each year and its members should represent all Districts. The immediate Past President shall be a member of the Nominating Committee and serve as the Committee's Vice Chair. Neither the current President nor the President-Elect shall be members of the Nominating Committee.

It is responsible for advertising officer positions for the coming year to the membership, interviewing member applicants and recommending a slate of nominations for all Chapter officer positions. Expense Code 5890

RPAC – This Committee will maintain a strong relationship with Florida REALTORS® and promote contributions to RPAC which will be transmitted to FAR on a monthly basis. Expense Code 5423

Scholarship – This Committee will promote the scholarship programs of the Institute, Chapter and Districts. It will coordinate the application process and educate the Districts as to how the Institute and Chapter scholarship programs work. It will strive to be sure all scholarships each year are awarded to qualified recipients and that the scholarships are used. Expense Code 5424

Sponsorship – This Committee is responsible for seeking out financial sponsors of the Chapter or specific Chapter activities in accordance with the Sponsorship Program and to ensure that those sponsors receive sufficient recognition and opportunity to network with the membership at all state meetings and, where possible, at District meetings. Expense Code 5422

Technology – This Committee will support the Chapter and Districts in the area of technology issues, primarily the website. It will have primary responsibility for the Chapter website and coordination of it with the Institute. The Committee may also work with CCIM Technologies to increase the use of their services by the Chapter members. Expense Code 5416

University Alliances – This Committee will strive to increase the participation of the universities and colleges in the state of Florida, in the Chapter activities. The Committee shall coordinate and assist colleges with master degree programs to become and remain a part of the University Alliance Program of the Institute.

The colleges in the University Fast Track Program in Florida are: Florida International University, Kellogg School of Management, University of Florida, University of Central Florida and University of Miami. The Committee shall work to interact with students, both in the undergraduate and master programs, to introduce the CCIM program and explain the benefits and the prestige of the designation within the commercial real estate industry. The success of the University Alliance program will depend on the effort to meet with professors and make the CCIM courses and networking available to the students. Expense Code 5425

Past Presidents Council – This Committee is composed of all past Presidents of the Chapter and is chaired by the past president once removed for a term of one year. The purpose is to advise the Chapter officers and Board of Directors of concerns, issues and matters of importance that they believe may be overlooked based upon their collective experience and history with the Chapter Leadership. The Past Presidents Council shall seek out and identify leadership individuals to apply for positions. The Past Presidents Council shall support and encourage current leadership. Expense Code 5432

V. FINANCE

A. Finance Committee

The Finance Committee shall be chaired by the Vice President Finance and shall be composed of all District Treasurers. A Vice Chair will be appointed by the Executive Committee.

B. Monthly & Annual Reviews

Monthly:

The Chapter will have its financial records reviewed by the Finance Committee on a monthly basis. Upon the close of the month, the Chapter bookkeeper will verify all expenses and income were correctly coded and run a Profit and Loss report by class. The resulting Profit or Loss will be transferred by the Chapter bookkeeper into the correct Sub-Account in Quickbooks to adjust the operating cash balance of each District. The Chapter bookkeeper will then ensure the net dollar change to the bank accounts are accurately reflected by the profit and loss statement for the month. The Chapter bookkeeper will then reconcile all bank accounts for the month in question and send a reconciliation report and copy of the bank statements to the Chapter VP of Finance for review.

Once the above steps are complete a preliminary Profit and Loss statement for the Chapter and each District will be sent to the Chapter VP of Finance for review against the current budget and for accuracy.

The VP of Finance will then either instruct the bookkeeper to make needed corrections or approve the distribution of the reports to all District Presidents/treasurers and the Executive Committee.

Annual:

Immediately upon the close of the calendar year the Chapter bookkeeper will run a profit and loss report and balance sheet for the preceding year and ensure all transactions are correctly coded. Then the bookkeeper will reconcile the net cash change for the year to the bank account and ensure each month is accurate. The bookkeeper will then send the profit and loss and balance sheet reports to the VP of Finance for review and approval. Any net income or loss should be added (or subtracted) to retained earnings and the Net Income in Quickbooks will reset to zero for the new calendar year. Once the Quickbooks account is correctly closed for the prior year, the President and the Vice President Finance year shall review the yearend financial statements and certify them to the bookkeeper before closing the books for the year. The VP of Finance will then send a copy of the year-end reports and any narrative to the Executive Committee for approval. The Finance Committee will prepare and submit the preliminary yearend financial statements to the Board of Directors at the Winter Meeting. The year-end financial statements shall be reviewed and approved by the Board of Directors. A minimum of every 3 years the Chapter will engage an independent third party or a Committee of 3 Past Presidents to review the Chapter's financial records.

C. Budgeted Expenses

All budgeted expenses must be submitted to the Chapter Bookkeeper per the attached Deposit and Expense Guidelines. Any request for funding must be accompanied by a description of the expense and all information as shown on the required form. The form must include who is requesting the check or who authorized the check, what expense or item is for, the purpose, the amount and what budget accounts the expense is to be charged. Appropriate form is attached.

D. Non-Budgeted Expenses

Any non-budgeted expenses in excess of \$1,000, or any expenditure that will exceed the budgeted amount by \$1,000 shall require the approval of the Executive Committee, prior to incurring such expense.

E. Checks/Online Banking Payments

Checks/on-line banking payments will be processed twice a month, approximately on the 15th and last day of each month.

Two authorizations of Executive Committee members of the proposed check register will be required for each check run. Any unbudgeted expenditures or expenditures exceeding budgeted amounts will be noted by the Chapter Bookkeeper in the email request for authorization to process checks. Any checks for unbudgeted amounts in excess of \$1,000 or shall require Executive Committee approval.

F. Deposits

The Districts are responsible for making deposits of cash and checks into the Chapter operating bank account. Each District has been supplied with an endorsement stamp and deposit slips. Deposits are to be made within three (3) business days of the Districts receiving the money. Documentation of the deposit must be prepared and provided per the attached Deposit Guidelines.

All receipts for the Chapter will be deposited by the Chapter Bookkeeper.

G. Reserve Accounts

During the budgeting process, the Vice President Finance will calculate the budget reserves for the Chapter and each District to determine the correct amount of reserves that must be in the reserves

investment accounts to comply with the By-Laws. In the event, the Chapter or any District is not in compliance, then the Chapter or the District must either budget 10% of their membership dues to be placed in the reserves investment accounts upon receipt of such or reduce their total annual operating budget so as to be in compliance.

The Executive Committee may authorize the VP Finance to transfer money from checking to the reserve investment accounts until the reserve investment accounts equal the total of all reserves, including the Chapter and Districts, required by the By-Laws. If the reserve investment accounts equal the budgeted reserves, then excess funds are to be deposited into an operating investment account that is approved by the Executive Committee.

Withdrawals from the reserve investment accounts by the VP Finance may only be approved by the Executive Committee with simultaneous notification to the Board of Directors.

H. Returned Checks

Returned deposits (check or electronic fees) will be imposed for the actual amount charged by the bank per the respective bank statement. The Chapter Bookkeeper will follow up on the payment of the original amount plus the returned check fee which must be made via certified check, money order, American Express, Visa, or MasterCard. If a check is returned for any reason, the Chapter Administrator will call or email the person submitting the check for payment stating the reason for return, the returned check fee, and offering to send a copy of the returned check (front and back) if requested. If no response is received, then the Chapter Administrator will send a letter to the person with a copy of this letter being sent to the District President (if it is a District event) and Vice President Finance. If no response is received after 30 days, the District President, Chapter President or Vice President Finance will call the person/company to find out the reason for nonpayment. If no response, the amount will be written off and the person/company will not be allowed to write checks to the Chapter in the future and if the person is a member of the Chapter/District, their membership will be terminated.

I. District Financial Accounts/Records

The Chapter Bookkeeper shall be responsible for handling and maintaining all District financial records. The Chapter Bookkeeper issue payments and handle processing of funds at the direction of the District President or his/her delegated representative who will serve as the Chapter Bookkeeper's contact person for financial matters pertaining to the District. The Vice President Finance will oversee the maintenance of all District finances which shall adhere to the approved District business plan.

J. Income and Expenses

Any type of payment processing such as PayPal or credit card charges and all other income and expenses must be processed through the Chapter Bookkeeper. There will be no exceptions to this rule. No District shall have a separate bank account of any type.

K. Savings and Investments

The Vice Present Finance may establish such other savings and investment accounts as the Board of Directors may deem appropriate from time to time.

L. Financial Statements

The Chapter Bookkeeper will provide monthly electronic financial statements to the Board of Directors no later than the 21st day of each month.

M. Travel Expenses

Each Chapter/District member shall be sure that any travel reimbursements requested from the Chapter shall comply with the attached Exhibit A “Florida CCIM Chapter Expense Reimbursement Policy and Guidelines” as revised and approved by the Executive Committee when necessary.

N. Annual Budgeting Process

On or before September 1st of each calendar year, the VP of Finance will distribute the appropriate budget template to each District and each Committee chair for the upcoming year. This budget template must be returned to the Finance Committee no later than October 1st. Upon receipt of all budgets, the VP of Finance will compile them together in the master budget form. The Finance Committee will then meet via phone or web to review the budget for the upcoming year, and will contact District Presidents to resolve any discrepancy or make any changes. The budgets will be shown in a final form to each District president at the annual Chapter officer training to ensure they are familiar with the modified budget and have an opportunity to ask any questions.

Each year at the winter meeting, the Board of Directors will approve the current annual budget, which will be made available for review no later than one week prior to the winter Board of Directors meeting. Once the budget is approved, the Chapter Bookkeeper will enter it into Quickbooks for tracking purposes. The VP of Finance will also instruct the Chapter admin to transfer any required amounts between the operating and reserve accounts to bring them in line with the annual required reserves as voted on by the Board of Directors, and following the above process in section F.

O. Chart of Accounts

In order to maintain reliable account records, account code changes should be kept to the absolute minimum. During the annual budgeting process, if the Finance Committee feels a code should be deleted or added, approval must be given by the executive Committee. Once approval is given, the VP of Finance will ensure all past history for any modified account code is accurately transferred and accounted for.

The budget form/template used for the annual budgeting process will also be standard forms as they tie to the current and active account codes. These forms cannot be altered or changed without executive Committee approval to ensure a systematic process occurs each year that is easy to follow for Districts and Chapter. See attached Exhibit “B” Florida CCIM Chapter Chart of Accounts.

P. Bank Accounts

There will be two bank accounts kept for the combined Chapter and District funds. These accounts may be kept at one financial institution to ensure ease of funds transfer and administration. The operating account will be a checking account, and the reserve account will be either a savings, CD or money market account and hold required reserves as per the current year's approved budget. Each bank account will be broken down in further detail by sub-account in the Quickbooks system so that each District and the Chapter will have a breakdown of their operating and reserve cash within the bank accounts. Transfers between bank accounts must be approved by the Executive Committee either on a regularly scheduled call or via email request from the VP of Finance. All accounts shall be held in an FDIC insured bank.

Q. Accounting System

The Chapter shall have the option to use an online accounting system such as Quickbooks Online to increase visibility into the Chapter and District finances. Only the Chapter Bookkeeper will have access to make changes to the accounts. The executive Committee may create additional user accounts with read only access to be used by appropriate executive Committee members as needed.

VI. DUES AND FEES ASSESSMENTS

A. Dues

The Chapter dues shall be set by the Board of Directors at the Summer Meetings. In the event the Board fails to set dues for the upcoming year by September 1st dues shall automatically remain at the previous year's assessment.

B. Complimentary Memberships

The Chapter may offer complimentary one year affiliate memberships to those who donate substantially according to the guidelines and business plan set forth by the Sponsorship Program.

C. District Dues Revenue Allocations

Each District shall be credited 50% of the membership dues for each paid member in its District within 30 days of Chapter Bookkeeper receiving the member's dues. The member will be accounted for in the District in which they reside, unless the member specifies another District of choice.

If a member wishes to be in multiple Districts then the member will pay an additional fee of 50% of original dues for each additional District membership and such additional dues will be credited to the appropriate District.

Each District will pay from its District membership income the following expenses that will be allocated based upon the prior year's membership in the Chapter as of June 30th:

- Its proportionate share, based upon the prior year's membership numbers, of fifty percent (50%) of the Chapter Administrator and Bookkeeper expenses budget for that year
- Its proportionate share of fifty percent (50%) of the cost to the Chapter for the Institute's unified billing program
- Credit card processing fees or similar fees for all District activities for which the Chapter collects the income.
- New Designees will be invited to attend a dinner event to honor them as new Designees at the expense of the District in which they reside, the cost not to exceed \$75 per designee and if cost does exceed \$75 per designee the Chapter will be responsible for the overage.
- TotalCommercial.com through Cornerstone Publishing monthly fees.

Each District will also budget and be charged for:

- Travel expenses for all District officers budgeted in the District budget for attending Chapter meetings including Board of Directors meetings, membership meetings, leadership training and Institute meetings including national business meetings and leadership training.
- Core course social events
- District sponsored scholarships

D. Allied Industries Membership Exchanges

With the consent of the majority of the Executive Committee, the Chapter shall agree to a complimentary membership exchange between an officer or an appointee of the Chapter and an executive officer or staff appointee of various non-profit business organizations, including but not limited to: Chambers of Commerce, business development corporations, economic development corporations, building industry associations, and university faculty.

- E. **Waivers**
Chapter membership dues shall be waived for all Florida resident CCIM instructors currently Certified by the Institute for the term of their tenure with the stipulation that the instructor must attend one of the two National Institute meetings and one State Chapter meeting per year. All past CCIM Institute Presidents and Florida Chapter Presidents living in Florida, and Hank Thompson Award recipients shall be given honorary membership to the Chapter (no membership dues required) and will be able to serve on the Board in elected and appointed positions.
- F. **University Member Fees**
A university member is one who is a college student and is in the real estate department of a Florida College. The annual fee is \$25. University members do not have the right to vote or hold office.

VII. EDUCATION

- A. **Net Proceeds Distribution**
The net proceeds after all expenses are paid for CI core courses will be split between the Chapter and the Districts, 30% to the sponsoring District and 70% to the Chapter. For CCIM Foundations or Ward Center courses, the sponsoring District will retain all of the net proceeds except for a \$500 Chapter administration fee.
- B. **Course Schedules**
During the summer of the preceding year, the Vice President Education will work with each District to prepare a schedule for the course offerings to be submitted to the Institute for approval. The schedule will insure a fair balance of courses for Districts and the avoidance of competing courses.
- C. **Course Budgets**
During the fall of the preceding year, each District will prepare a course budget including estimated income, expenses and net proceeds. The budget must be approved by the Chapter Vice President Education before any expenses can be incurred. Contracts for course venues must be reviewed by the Chapter Vice President Education prior to execution by the District President, District Education Chair or Chapter Administrator.
- D. **Instructor Selection**
The Chapter will strive to select the most qualified instructors from the approved instructor roster maintained by the CCIM Institute. The chapter will endeavor to first select qualified instructors from the Florida Chapter, with the balance of assignments filled from a cross section of instructors from around the nation. The selected instructors shall agree to and execute the Chapter Instructor Agreement.
- E. **Instructor Course Payments**
If the Chapter receives an advance payment on the proceeds to be paid to the Chapter equal to or greater than the instructor fees, the instructors will be paid upon completion of the course and submission of an invoice. The Chapter will pay the instructors via online bank checking or by any other means selected by the Chapter. If an advance payment is not received, the instructors will be paid upon receipt of the instructor's invoice and receipt of sufficient funds to cover the instructor fees or within two weeks of submission of invoice; but in no case later than two weeks of class completion.
- F. **Jay W. Levine Leadership Development Academy**
Attendees - Each year the Executive Committee may sponsor CCIM Designees to attend the Jay W. Levine Leadership Development Academy on behalf of the Chapter if funds are available. The selected Designees

shall be selected on the basis of demonstrated leadership and their desire to be leaders in the Chapter. Any other Designees may attend the Academy at their own expense if approved by the Executive Committee. No more than four (4) members of the Chapter membership shall attend the Academy in any one year.

Sponsorship – The Chapter shall budget up to \$10,000 to assist Chapter sponsored attendees with costs. The budget will cover the reasonable and frugal costs of tuition and approved travel costs. Any expenses in excess of the budget will be the attendee’s obligation. The funds for this sponsorship are budgeted under Licensed Delivery in anticipation that Licensed Delivery will be profitable and able to support the development of future Chapter leaders.

Deadline – Applicants to the Academy must complete the application process by September 15th of each year.

Continued Service – In exchange for an attendee being sponsored by the Chapter, attendee will be expected to support the Chapter through leadership roles in the future in the next 3 to 5 years after graduation from the Academy. Graduates become the primary candidates for future leaders of the Chapter.

The Academy - The Jay W. Levine Leadership Development Academy is a dynamic initiative that will foster the development of the next generation of leaders in the commercial investment real estate industry. The program will create a network of leaders whose increased awareness and commitment to service will help shape the future of the CCIM Institute.

The academy is named in memory of Jay W. Levine, CCIM #2 and the first president of the CCIM Institute. Jay was an inspirational and industry leader for close to four decades before his death in January 2002.

This program is designed to encourage, strengthen and build the pool of future leaders for the top volunteer positions within the CCIM organization. It's also ideal for further developing personal talents and skills that impact and influence everyday business relationships.

These goals will be accomplished through organized training sessions; networking opportunities with peers, academy graduates, current institute leaders and various past Presidents; and through assigned activities (such as required readings and completion of a future business plan). The academy will be led by professional facilitators.

G. CI Course Socials

CI Core Courses – The Chapter will reimburse the Districts for holding a course social at the rate of \$10 per student for the students attending a CI core course plus \$30 to cover instructors and/or guests. This payment to the Districts will be automatic upon the submission of the request for payment or reimbursement of the social expenses.

CCIM Foundations and Ward Center Courses – Each District is encouraged to hold a social at District sponsored intro courses and since the District retains all of the net proceeds from the course, the expenses for the social are not reimbursed by the Chapter.

H. Course Cancellations

In the event a course does not have sufficient students registered to show a budgeted break-even, the Education Chair will consult with the sponsoring District to make the decision to cancel a course. The final decision to cancel a course is the responsibility of the Vice President Education.

VIII. MEETINGS

A. Mandatory Meetings

Per the By-Laws, the Chapter shall hold two meetings of the general membership and the Board of Directors each year. One meeting will be held during the summer (Summer Meeting) and the second meeting shall be held during the winter typically in January (Winter Meeting).

B. Leadership Training Meeting

In addition, the Chapter will also hold a Leadership Training meeting, typically during the month of October.

IX. AWARDS

A. Chapter Awards

1. District of the Year Award

- The District of the Year Award will be awarded by the Chapter President to the District which outperformed other Districts by doing two or more of the following within that year:
- Provided the most benefits to its members (meetings, events, etc.)
- Exceeded membership by 20% or more from the previous year
- Obtained the most sponsorships
- Turned their District around financially

2. Recognition of Retiring President

3. Chapter Sponsor of the Year Award

B. Hank Thompson Award Guidelines

1. The Hank Thompson Award:

The Hank Thompson Award originated in 1990 in honor of Henry E. Thompson, President of the Florida CCIM Chapter (hereinafter referred to as Chapter) in 1983. The award is given in recognition of a Chapter Designee member in good standing (as defined in the CCIM Institute Bylaws and Chapter Policy and Procedures), other than the serving President and President-Elect, who made a significant impact on the Chapter on a cumulative basis. The Hank Thompson Award recipient shall receive a personal plaque for his/her home or office, their state Chapter dues will be waived for life and the Communications Chair or Administrator will seek maximum media exposure for the recipient of this award.

2. Criteria for Qualification of the Award:

- Nominee must have a minimum of 10 years as a member in good standing.
- The Designee played an important role in the development of programs and/or events that resulted in providing benefits and services to Chapter members.
- The Designee promoted high morale among the Chapter members.
- The Designee substantially assisted in the development of new members to the Chapter.
- The Designee demonstrated keen loyalty to the CCIM designation and to the Chapter.
- The Designee maintained the highest possible standard of business ethics in dealing with Chapter members.

3. Nomination guidelines and process:

- All Chapter Designee Members in good standing are eligible to nominate someone.

- Chapter Members will be asked no later than Sept. 15th of each year to submit their nominations. All nominations will be due no later than October 31st.
- The current residing Chapter President, President-Elect and Administrator will oversee the nomination process and will be excluded from nominating anyone for the award.
- Nominations shall be limited to a restricted template allowing a maximum of two (2) pages provided by the Chapter and must cover the required criteria provided in section II of this policy. If the nominator fails to submit the completed template, they will be asked to resubmit their nomination via the approved template and if they do not adhere to this requirement, their nomination will be null and void.

4. Selection Guidelines:

- The chair of the Past Presidents Council will serve as the chair of the group if a meeting or call is required and will work with the current President and President Elect to meet the timelines for this award.
- Nominations meeting the criteria will be submitted to the past recipients. The name of the person nominating the member will not be included on the form and will only be known to the President, President Elect and Chapter Administrator.
- A Ballot will be sent to all past recipients of the award and current designee Chapter Members. The ballots will be secret with no conversations or discussions amongst past recipients. The ballot will have an option to vote for and select, "None of the Candidates".
- 67% of the votes are required to win otherwise no winner for that year.
- The Ballot results will be viewed by the Chapter President, President Elect and Chapter Administrator.
- The process will be governed by "Robert's Rules"
- The President will be responsible for ordering the award recipient's plaque and the award shall remain anonymous until it is presented to the recipient at the next Winter Business meeting.

C. District Awards

Each District will develop its own awards program which will be subject to the Chapter's review.

X. SPONSORSHIPS

A. Sponsors

The Chapter and the Districts may solicit sponsors for their respective organizations or for special events.

The member soliciting such sponsorships for the Chapter may use the attached Chapter Sponsorship Program, when necessary, as revised and approved by the Executive Committee.

Each District may have its own respective sponsorship program subject to the approval of the Chapter Executive Committee and/or Chapter Sponsorship Committee Chair.

XI. USE OF THE CCIM DESIGNATION GUIDELINES

A. CCIM Designation Misuse

Misuse of the CCIM designation by a candidate or anyone who is not a designee is strictly prohibited and subject to disciplinary action, including recourse by the Institute and the National Association of REALTORS® to state real estate licensing agencies in order to protect the integrity of the CCIM designation.

B. References to Candidate Status

Institute candidates may not refer to their candidate status, except in a resume to prospective employers and must never place CCIM before Candidate.

The correct wording on membership applications, in articles, on flyers, etc. is "Institute Candidate" not CCIM Candidate. To be an Institute Candidate, you must make formal application and be current on your institute dues. Chapters are chartered with the CCIM Institute and the dues of the two are paid separately. For further information please visit www.ccim.com

C. SUBORDINATION TO CCIM INSTITUTE

To avoid conflicts between the activities of Chapters and between activities of CCIM Institute, local boards, state associations, the NATIONAL ASSOCIATION OF REALTORS®, and its Institutes, Societies and Councils, the CCIM Institute shall issue from time to time, regulations and directives to which the Chapter shall conform.

FLORIDA CCIM CHAPTER EXPENSE REIMBURSEMENT POLICY & GUIDELINES

(APPROVED AUGUST 20, 2015)

* ALL EXPENSES MUST BE SUBMITTED WITHIN THIRTY (30) DAYS OF EXPENSE

FUNDS PERMITTING, THE FLORIDA CCIM CHAPTER WILL REIMBURSE EXPENSES FOR ATTENDANCE AT STATE CHAPTER MEETINGS FOR THE CHAPTER OFFICERS, COMMITTEE CHAIRS, DISTRICT PRESIDENTS AND DISTRICT VICE PRESIDENTS, AS FOLLOWS (EXCEPTIONS REQUIRE THE PRIOR APPROVAL OF THE CHAPTER PRESIDENT OR AS DIRECTED OTHERWISE.)

PRIOR TO EACH CALENDAR YEAR, THE VICE PRESIDENT OF FINANCE OR THE CHAPTER BOOKKEEPER SHALL PROVIDE CHAPTER OFFICERS, COMMITTEE CHAIRS, DISTRICT PRESIDENTS AND DISTRICT TREASURERS (AND ANY ADDITIONAL MEMBERS UPON REQUEST) AN INVITATION VIA AN E-MAIL WEB LINK TO A FILE SHARING FOLDER DIRECTORY IN DROPBOX. THE DROPBOX DIRECTORY SHALL CONTAIN FOLDERS FOR ALL CHAPTER RELATED DEPOSITS AND EXPENSES. CONCISE DIRECTIONS FOR THE PROPER UTILIZATION OF DROPBOX FOR THE PROPER PROCESSING OF CHAPTER RELATED DEPOSITS AND EXPENSES SHALL BE INCLUDED IN THE E-MAIL INVITATION.

WITHIN DROPBOX, SEPARATE FILES SHALL BE CREATED FOR CHAPTER, DISTRICT AND LICENSE DELIVERY BUSINESS. ALL DEPOSITS, EXPENSES AND REIMBURSEMENT REQUESTS PERTAINING TO CHAPTER, DISTRICT AND LICENSE DELIVERY BUSINESS ARE TO BE PLACED WITHIN THE APPROPRIATE FOLDER FOR PROMPT PROCESSING AND PAYMENT BY THE BOOKKEEPER IN ACCORDANCE WITH SECTION V., PARAGRAPH C OF THE FLORIDA CCIM CHAPTER POLICIES & PROCURES MANUAL.

TRAVEL RELATED EXPENSES

AIR TRAVEL

COACH OR ECONOMY IS REIMBURSED (WHEN POSSIBLE, BOOK SUFFICIENTLY IN ADVANCE TO GET THE LOWEST AVAILABLE RATES). IF AIRFARE, (INCLUDING AIRPORT PARKING FEES AND GROUND TRANSPORTATION) IS LESS THAN MILEAGE, THE REIMBURSEMENT AMOUNT WILL EQUATE TO THE LESSER OF THE TWO AMOUNTS. ONE CHECKED BAG WILL BE REIMBURSED IF THERE IS A FEE CHARGED BY THE AIRLINE. EXTRA BAGGAGE/OVERWEIGHT BAGGAGE WILL NOT BE REIMBURSED.

AIRPORT, LIMO, TAXI, BUS OR SIMILAR

REIMBURSED AT ACTUAL COST. RENTAL CAR REIMBURSEMENT NOT TO EXCEED \$60/DAY.

TRAVEL BY PERSONAL AUTO

MAPQUEST OR SIMILAR MUST ACCOMPANY EXPENSE REPORT. MILEAGE WILL BE REIMBURSED AT THE IRS ALLOWABLE RATE, WHICH IS CURRENTLY \$0.575/MILE. BEFORE SUBMITTING EXPENSE REPORT, PLEASE VERIFY MILEAGE RATE WITH WWW.IRS.GOV.

PARKING AND TOLL CHARGES

REIMBURSED AT ACTUAL RATE. RECEIPTS REQUIRED (IF ELECTRONIC PASS USED, I.E., E- PASS/SUNPASS, THEN PROVIDE A COPY OF THE E-STATEMENT WITH THE ITEMS CIRCLED PERTAINING TO RESPECTIVE TRAVEL).

LODGING

HOTEL, MOTEL OR LIKE ACCOMODATIONS REQUIRED FOR THE APPROVED CHAPTER MEETINGS. ADDITIONAL NIGHTS LODGING NOT REQUIRED BY CHAPTER BUSINESS IS THE RESPONSIBILITY OF THE INDIVIDUAL AND WILL NOT BE REIMBURSED. IF THE TRAVEL DISTANCE IS LESS THAN 240 MILES, ONE (1) NIGHT'S LODGING IS AUTHORIZED AND WILL BE REIMBURSED AT A RATE NOT TO EXCEED THE RATE FOR THE MEETING SITE HOTEL. IF THE TRAVEL DISTANCE EXCEEDS 240 MILES, THEN TWO (2) LODGING NIGHTS SHALL BE REIMBURSED AT A RATE NOT TO EXCEED THE RATE FOR THE MEETING SITE HOTEL.

MEALS

CHAPTER PER DIEM ALLOWANCE IS \$50.00 PER DAY, INCLUDING THE TRAVEL DAY, WHICH INCLUDES TIPS (RECEIPTS ABSOLUTELY REQUIRED FOR MEAL CHARGES). NOTE: THE CHAPTER WILL NOT REIMBURSE MEALS TAKEN WHEN THE MEALS ARE PROVIDED BY THE CHAPTER – E.G. BREAKFAST AND LUNCH DURING CHAPTER MEETINGS.

TELEPHONE

ALL DOCUMENTED CHAPTER RELATED BUSINESS CALLS ARE REIMBURSABLE.

OTHER

INCLUDES ITEMS SUCH AS POSTAGE.

NON-REIMBURSABLE EXPENDITURES

THE FOLLOWING EXPENSES ARE NOT REIMBURSED: PERSONAL ENTERTAINMENT (IN—ROOM MOVIES, HEALTH CLUB FEES, AIRLINE MOVIES); PURCHASE OF BOOKS AND MAGAZINES; BARBER AND BEAUTICIAN FEES; KENNEL FEES; PERSONAL TELEPHONE CALLS; PERSONAL ATTIRE FOR BANQUETS; IN-ROOM SERVI-BARS; LIQUOR PURCHASES; LAUNDRY.

CHAPTER PRESIDENT

SHALL BE REIMBURSED ALL EXPENSES TO ALL STATE CHAPTER MEETINGS, CCIM INSTITUTE MEETINGS, AND OTHER MEETINGS IN THE NAME OF CHAPTER BUSINESS, INCLUDING VISITS TO THE CHAPTER DISTRICTS. IN THE EVENT THE PRESIDENT IS ATTENDING A STATE CHAPTER FUNCTION IN THE CAPACITY AS FIRST REGIONAL VICE PRESIDENT, THE CHAPTER SHALL REQUEST REIMBURSEMENT FOR EXPENSES FROM THE CCIM INSTITUTE.

CHAPTER PRESIDENT ELECT

SHALL BE REIMBURSED UP TO \$750.00 PER ATTENDED STATE CHAPTER MEETINGS AND CCIM INSTITUTE MEETINGS WITH APPROPRIATE RECEIPTS. ALL EXPENSES TO ALL STATE CHAPTER MEETINGS, CCIM INSTITUTE MEETINGS, AND OTHER MEETINGS IN THE NAME OF CHAPTER BUSINESS. CODE #7015 DISTRICT EXP:LEADERSHIP TRAVEL TO CHP MTG, #7020 DISTRICT EXP:LEADERSHIP TRAVEL TO NAT'L MTG, #7025 DISTRICT EXP:LEADERSHIP TRAVEL TO STATE CHAPTER LDR TRAINING, #7030 DISTRICT EXP:LEADERSHIP TRAVEL TO NAT'L LDR

REGIONAL VICE PRESIDENT

SHALL BE REIMBURSED FOR ALL EXPENSES INCURRED WHEN ATTENDING STATE CHAPTER MEETINGS AND CCIM INSTITUTE MEETINGS. THE CHAPTER SHALL REQUEST REIMBURSEMENT FOR EXPENSES FROM THE CCIM INSTITUTE WHEN CONDUCTING BUSINESS ON THE CCIM INSTITUTE'S BEHALF.

COMMITTEE CHAIRS

SHALL BE REIMBURSED ALL EXPENSES IN ACCORDANCE WITH THE POLICIES AND GUIDELINES BELOW.

DISTRICT PRESIDENTS & VICE PRESIDENTS

SHALL BE REIMBURSED ALL EXPENSES IN ACCORDANCE WITH THE POLICIES AND GUIDELINES BELOW.

DOCUMENTATION REQUIRED

- ALL EXPENSE REIMBURSEMENT CLAIMS MUST BE ACCOMPANIED WITH ORIGINAL RECEIPTS. IF ORIGINALS WERE NOT PROVIDED BY VENDOR, A COMPARABLE RECEIPT, (I.E., INTERNET RECEIPT), MUST ACCOMPANY DOCUMENTATION. YOU MAY EMAIL OR FAX YOUR EXPENSE REPORT ALONG WITH APPROPRIATE BACK UP. PLEASE KEEP ALL ORIGINAL RECEIPTS/REPORTS ON FILE IN CASE NEEDED BY THE CHAPTER.
- ORIGINAL AIR, RAIL, BUS OR TAXI TICKETS MUST BE INCLUDED WITH EXPENSE REIMBURSEMENT FORMS OR AN ELECTRONIC COPY OF THE CONFIRMATION IF APPROPRIATE.
- CAR MILEAGE TO AND FROM AN APPROVED MEETING MUST BE DETAILED WITH BACK-UP SUCH AS MAPQUEST.
- ORIGINAL BREAKFAST, LUNCH, DINNER AND SNACK RECEIPTS FOR AN APPROVED MEETING MUST ACCOMPANY THE FORM. MEALS FOR MORE THAN ONE PERSON SHOULD HAVE DOCUMENTED NAMES OF ATTENDEES AND THE BUSINESS DISCUSSION.
- BILLS FROM HOTEL, MOTEL OR LIKE ACCOMMODATION MUST BE ATTACHED.
- RECEIPTS FOR MISCELLANEOUS EXPENSES AND INCIDENTAL ITEMS. INCIDENTALS DO NOT INCLUDE MOVIES, DRUGS, TOILETRIES OR ITEMS THAT A PERSON WOULD NORMALLY PURCHASE WHILE NOT ON BUSINESS TRAVEL.
- ANY EXPENSE OVER \$25 NEEDS PROPER DOCUMENTATION.
- PLEASE FORWARD THE EXPENSE REPORT WITH APPROPRIATE BACK-UP TO THE ATTENTION OF THE FL CCIM ADMINISTRATOR AT info@flccim.com
- PLEASE RETAIN ALL COPIES FOR YOUR RESPECTIVE DISTRICT. ADMINISTRATOR MAY REQUIRE FOR ACCOUNTING PURPOSES AT A LATER DATE.
- PLEASE AVOID SENDING DUPLICATE DOCUMENTS, I.E., DO NOT FAX/EMAIL A REPORT AND THEN SEND AGAIN VIA MAIL.

2016 CHART OF ACCOUNTS
Florida CCIM Chapter
Exhibit "B" to SOPs

INCOME

4000	CHAPTER MEMBERSHIP INCOME
4010	CHAPTER MEMBERSHIP INCOME - (Special Events Only)
4020	CHAPTER Sponsors (Annual)
4025	CHAPTER Sponsors (Special Events & Meetings)
4020	CHAPTER Sponsors
4030	CHAPTER CCIM Institute Reim for Leadership Training
4040	CHAPTER Interest Income
4050	CHAPTER Activities (RPAC Income)
4060	CHAPTER Other Income
<u>Licensed Delivery</u>	
4100	LD · Education Activities Income
4110	LD · CORE Course Income
4120	LD · Intro Course Income
<u>District Income</u>	
4200	DISTRICT INCOME
4210	DISTRICT INCOME: Memberships
4217	DISTRICT INCOME: Affiliate Member Income
4218	DISTRICT INCOME: Members (Special Events Only)
4220	DISTRICT INCOME: Board of Directors Meetings
4221	DISTRICT INCOME: Core Course Profit Split
4223	DISTRICT INCOME: Intro Course Profit Split
4225	DISTRICT INCOME: Candidate Development Workshops
4230	DISTRICT INCOME: Sponsorships (Annual)
4235	DISTRICT INCOME: Sponsorships (Special Events Only)
4240	DISTRICT INCOME: Outlook Conferences (Attendee Income)
4245	DISTRICT INCOME: Outlook Conferences (Sponsorship Income Only)
4250	DISTRICT INCOME: Socials (Bkft, Lunch & Dinner)
4251	DISTRICT INCOME: Reimburse CORE Course Socials
4255	DISTRICT INCOME: Education Special Events
4260	DISTRICT INCOME: Golf Events
4270	DISTRICT INCOME: Recognition/Awards Events
4275	DISTRICT INCOME: Designation Promotion
4280	DISTRICT INCOME: Mentoring Program
4290	DISTRICT INCOME: Other
<u>Chapter Education Income</u>	
4400	CHAPTER Education Income
4420	CHAPTER Licensed Delivery Admin Fee
4450	CHAPTER Education Income: Specialty Courses
4900	Past Presidents Contributions


EXPENSES

<u>Chapter Administration</u>	
5000	CHAPTER ADMINISTRATION
5001	CHAPTER ADM. Bank Charges
5002	CHAPTER ADM. Credit Card Processing
5004	CHAPTER ADM. Insurance
5010	CHAPTER ADM. Management Fee
5012	CHAPTER ADM. Management Travel
5015	CHAPTER ADM. Bookkeeping
5021	CHAPTER ADM. Chapter Website Expenses
5030	CHAPTER ADM. Printing
5040	CHAPTER ADM. Corporate Filing Fees
5042	CHAPTER ADM. Tax Preparation & Fin Review
5060	CHAPTER ADM. Office Expense General
5062	CHAPTER ADM. Postage General
5088	CHAPTER ADM. Core Course Social Reimbursement
5090	CHAPTER ADM. Miscellaneous Adm
5580	CHAPTER ADM. Office Supplies
5583	CHAPTER ADM. Internet
5200	CHAPTER CCIM Institute Meetings
5201	CHAPTER CCIM Institute Meetings:Chapter President
5202	CHAPTER CCIM Institute Meetings:Chapter President-Elect
5203	CHAPTER CCIM Regional VP
5204	CHAPTER CCIM Candidate Guidance
5205	CHAPTER CCIM VP Finance
5230	CHAPTER CCIM Institute Meetings:Chap Contrib to Nat'l Inaugural
5240	CHAPTER CCIM Institute Meetings:Chapter Pres-Elect to Leader
5241	CHAPTER CCIM Institute Meetings:Other Chap Ofc to Leadership
5245	CHAPTER CCIM Institute Meetings:Other Chap Officer to Trainging
5250	CHAPTER CCIM Institute Meetings:New Designee Dinner
5251	CHAPTER CCIM Institute Meetings:Gifts for New Designees
5300	CHAPTER Florida Assoc of Realtor Mtgs
5302	CHAPTER Florida Assoc of Realtor Mtgs:Contributions to Inaugural
5400	CHAPTER MEETINGS
5410	CHAPTER MEETINGS:President
5411	CHAPTER MEETINGS:President Elect
5412	CHAPTER MEETINGS:VP Opns
5413	CHAPTER MEETINGS:VP Admin
5414	CHAPTER MEETINGS:VP Finance
5415	CHAPTER MEETINGS:Membership Ch
5416	CHAPTER MEETINGS:Technology
5417	CHAPTER MEETINGS:VP Education
5418	CHAPTER MEETINGS:Newsletter/Communications

5419	CHAPTER MEETINGS:Marketing
5420	CHAPTER MEETINGS:Com Alliance
5421	CHAPTER MEETINGS:Legislation
5422	CHAPTER MEETINGS:Sponsors
5423	CHAPTER MEETINGS:RPAC
5424	CHAPTER MEETINGS:Scholarship
5425	CHAPTER MEETINGS:Counselor Dir
5426	CHAPTER MEETINGS:At Large Dir #1
5427	CHAPTER MEETINGS:At Large Dir #2
5428	CHAPTER MEETINGS:At Large Dir #3
5429	CHAPTER MEETINGS:Other
5430	CHAPTER MEETINGS:Designation Promotion
5431	CHAPTER MEETINGS:Candidate Development
5432	CHAPTER MEETINGS:Past President
5450	CHAPTER MEETINGS:Bkft/Lunch/Snacks
5460	CHAPTER MEETINGS:Dinners
5470	CHAPTER MEETINGS:Meeting Room Chg
5480	CHAPTER MEETINGS:FAR Room/Food/AV Costs
5700	CHAPTER LEADERSHIP DIS VISIT
5710	CHAPTER LEADERSHIP DIS VISIT:President
5720	CHAPTER LEADERSHIP DIS VISIT:President Elect
5730	CHAPTER LEADERSHIP DIS VISIT:VP Operations
5740	CHAPTER LEADERSHIP DIS VISIT:Other Officers
Chapter Committee Activities	
5800	CHAPTER COMMITTEE ACTIVITIES
5810	CHAPTER COMMITTEE ACTIVITIES:Finance
5820	CHAPTER COMMITTEE ACTIVITIES:Membership
5830	CHAPTER COMMITTEE ACTIVITIES:Technology
5840	CHAPTER COMMITTEE ACTIVITIES:Designation Promotion
5850	CHAPTER COMMITTEE ACTIVITIES:Newsletter/Communications
5856	CHAPTER COMMITTEE ACTIVITIES:Marketing Activities
5860	CHAPTER COMMITTEE ACTIVITIES:Commercial Alliances
5865	CHAPTER COMMITTEE ACTIVITIES:Total Commercial
5870	CHAPTER COMMITTEE ACTIVITIES:Legislation
5880	CHAPTER COMMITTEE ACTIVITIES:Sponsorship
5885	CHAPTER COMMITTEE ACTIVITIES:Scholarship
5890	CHAPTER COMMITTEE ACTIVITIES:Nominating
5895	Foundation Course Fee
5910	Counselor & Director-at-Large Expenses
6802	Scholarships: Chapter 50/50 Program
6850	University Alliance
6900	Jay Levine Ldr Acad
6910	Jay Levine Tuition
6920	Jay Levine Travel Expenses

<u>License Delivery Expenses</u>	
6000	LD Expense
6086	LD - License Delivery Adm. Fee
6302	LD - Profit Split to Dist
6400	LD - Instructor Fee (Core)
6450	LD - Instructor Fee (Intro)
6520	LD - Meeting Rooms
6530	LD - Marketing
6540	LD - Food/Beverages
6550	LD - On-Site Admin
6560	LD - CORE Course Reimburse Social to District
6565	LD - A/V Equipment
6570	LD - Misc
<u>District Expenses</u>	
7000	District Exp
7002	District Exp: Credit Card Processing
7010	District Exp:District Board of Dir Mtg
7015	District Exp:Leadership Travel to Chp Mtg
7020	District Exp:Leadership Travel to Nat'l Mtg
7021	District Exp:Website Expense
7022	District Exp:Pro-Rate Share of Chapter Website Expenses
7025	District Exp:Leadership Travel to State Chapter Ldr Training
7030	District Exp:Leadership Travel to Nat'l Ldr
7035	District Exp:Pro-Rata Share of Chp Admin Cos
7038	District Exp:Pro-Rata Share of Chp Bookkeeping Cost
7040	District Exp:District Admin Assist
7050	District Exp:CCIM CORE Course Socials
7055	District Exp:Outlook Conf Expense
7060	District Exp:Other Education Events
7061	District Exp:District Charitable Donations
7065	District Exp:Prorate Share of Cornerstone Publishing - Rick Orr
7100	District Exp:Designation Promotion Adv
7200	District Exp:Scholarships
7216	District Exp:Mentoring Program
7250	District Exp:New Designee Dinner
7330	District Exp:Marketing/Social Events
7350	District Exp:Holiday Appreciation Party
7400	District Exp:Golf Events Expenses
7500	District Exp:Awards
7600	District Exp:Profit Sharing with Event JV Partners
7700	District Exp:Postage/Mail/Print/Copy
7701	District Exp:Office Supplies
7710	District Exp:Other

<u>Additional Chapter Expenses</u>	
7300	CHAPTER Networking/Mkting/Social Events
8000	CHAPTER Hank Thompson Award
9000	CHAPTER Past President's Expenses

 denotes a new account for this year