



International guidelines and application – South Africa

For those who manage to
make a difference.™



Hi, we're IREM®

We're an international institute for property and asset managers, providing complete knowledge to solve real estate management challenges.

For over 85 years, our members have made us the world's strongest voice for all things real estate management. Today, almost 20,000 leaders in commercial and residential management call this home for learning, certifications, and networking.

We offer:

Industry-leading learning

For new and experienced managers, IREM offers courses, tools, publications, and news developed by the brightest real estate managers. Regardless of the topic, IREM offers the most complete real estate management knowledge.

Internationally recognized certifications

IREM's certifications are symbols of ethical leadership and a well-managed property worldwide. The IREM CPM® is the premier property management certification and our early-career certifications for residential and commercial managers help those starting out to develop command of the fundamentals. Property management firms may also pursue the prestigious AMO® (Accredited Management Organization) designation.

Powerful networking

IREM members make up an international community of residential, commercial, retail, and mixed-use managers. Connect with 80 U.S. Chapters and 17 International partners or network with IREM and industry leadership at the IREM Global Summit and other IREM events.

If you know real estate management, come get to know IREM.

Membership and education outside the U.S.

IREM membership can help create opportunities, secure a professional advantage, and develop successful strategies in today's competitive real estate market.

Individuals from South Africa have the added option to apply for membership and take courses through IREM's international partnership – South Africa Gauteng Chapter.

South Africa Gauteng Chapter

Email: admin@iremgauteng.org.za

Phone: +27 11 325 7408

Website: <http://iremsagauteng.org.za/>

Invest in your career

Become a CPM®

The CPM is the most recognized certification for property managers world-wide. Owners, investors, and employers know that if you hold an IREM CPM designation, you can maximize the value of any property in any asset class. CPMs are recognized as the ultimate asset performance experts. The designation is known and trusted throughout the industry and earned through education and experience.

CPMs say earning the designation is essential for:

- Recognition within the industry as a trusted professional
- Access to timely information, ongoing learning and professional development
- Respect of peers, colleagues, and owners
- Commitment to advancing the real estate management profession

CPMs can:

1. Make more money.

- CPMs earn credibility, respect, and higher earnings. Employers consider the CPM the most important real estate management designation
- More than half of CPMs hold senior-level management positions
- CPMs have the potential to make over twice as much as the average property manager
- IREM promotes the CPM designation to potential clients and employers – and you reap the reward

2. Be a more effective, efficient professional.

- Get solutions to the challenges you face every day with member discounts on IREM courses, publications and research
- Access the tools you need, when you need them, with online solutions like webinars and on-demand courses
- Receive the personal care and support you need from IREM – locally, nationally, and globally

3. Join a community of professionals.

- Expand your network and establish new contacts: make deals, exchange tips, identify future employers and employees, and learn new industry trends and best practices
- Attend events for professional education and to share ideas with fellow IREM members face to face

CPM designation requirements

Checklist

The following provides an overview of the requirements that are required before you can apply for the CPM. It is highly recommended that the education requirement be completed prior to attempting the management plan/MPSA® and the CPM certification exam.

Experience

Three years (36 months) of qualifying real estate management experience as defined by IREM ([meeting portfolio and function minimums](#)). All experience must be documented using the experience forms included in this application.

Education

Two options in which the education requirement can be completed: Option 1 or 2 must be done before submitting a CPM Application

Option 1: Take the 7 IREM Courses – if you do not have one of the degrees listed under Option 2 →

1. FIN402
2. MKL406
3. HRS402
4. MNT402
5. ASM603
6. ASM604
7. ASM605

Option 2: Hold both or one of the listed degrees from Wits University

Postgraduate Diploma in Property Development and Management

AND/OR

Bachelor of Science Degree in Real Estate

Degrees Submitted from other universities will be reviewed on a case by case basis

Winter School Program – Block 4

- CPM Certification Exam (includes CPM001)
- MPSA Preparation
- Management Plan Skills Assessment (MPSA)
- Ethics for the Real Estate Manager (ETH800)

Requirements to become a CPM – detailed version of checklist

Education

Meet one of following education options.

Option 1. IREM Courses.

Most applicants complete the education requirement by taking these courses covering the full property management curriculum:

1. "Property Maintenance and Risk Management" (MNT402)
2. "Human Resource Essentials for Real Estate Managers" (HRS402)
3. "Marketing and Leasing: Retail Properties" (MKL404) or "Marketing and Leasing: Multifamily Properties" (MKL405) or "Marketing and Leasing: Office Buildings" (MKL406)
4. "Investment Real Estate: Financial Tools" (FIN402)
5. "Investment Real Estate Financing and Valuation – Part One" (ASM603)
6. "Investment Real Estate Financing and Valuation – Part Two" (ASM604)
7. "Investment Real Estate Financing and Valuation – Part Three" (ASM605)

Note: taking [FIN402](#), [ASM603](#), [ASM604](#), and [ASM605](#) in consecutive order is strongly recommended.

Option 2. CPM Fast Track

You may be able to bypass the education requirement if you hold one of the following through University of Witswatersrand (Wits University):

- ❑ Postgraduate Diploma in Property Development and Management
- ❑ Bachelor of Science Degree in Real Estate from the University of Witswatersrand (Wits University).

An official transcript that lists your degree and a copy of the degree from a college or university, is required at the time you submit your application

CPM Certification Exam

Pass the CPM certification exam, which covers these competency areas: financial operations and asset management, human resource management, legal and risk management, maintenance and operations, and marketing and leasing.

Includes a CPM Certification exam preparation seminar, including financial spreadsheet review (CPM001) followed by completion of the CPM Certification Exam.

Management Plan (MPSA)

Attend the MPSA Preparation seminar and successfully complete the Management Plan Skills Assessment

Ethics

Take and pass "Ethics for the Real Estate Manager" (ETH800) and continue to commit to uphold the IREM Code of Professional Ethics. A copy of the Code is included in this application.

Experience

To earn the CPM, you must have at least 36 months of qualifying real estate management experience – managing a minimum size portfolio and performing at least 19 of 36 real estate management functions on that portfolio. Use the information below to determine if your portfolio would qualify. You will then use the experience forms, found in the CPM application to report your qualifying experience.

What types of real estate portfolios can qualify?

You can manage any combination of the property types listed below. If your portfolio meets the minimum requirement for any one of the property types (e.g., you have 120,000 square feet of commercial square footage at 1 site) your portfolio qualifies. If not, read about mixed portfolios below.



Residential property

IREM defines residential properties as apartments, condominiums, homeowners' associations, mobile homes, mobile home parks, single-family homes, hotels, and motels



Commercial property

IREM defines commercial properties as office buildings, retail building, shopping centers, multi-tenant industrial property, research and development properties and self-storage centers



Industrial property

IREM defines industrial property as single-tenant space.

| Minimum requirement | | Minimum requirement | | Minimum requirement | |
|---------------------|--------------------|----------------------|--------------------|----------------------|--------------------|
| Units | Sites ¹ | Sq. ft. / Sq. meters | Sites ¹ | Sq. ft. / Sq. meters | Sites ¹ |
| 200 | 1-4 | 120,000 / 11,000 | 1 | 200,000 / 18,500 | 1+ |
| 100 | 5+ | 80,000 / 7,500 | 2+ | | |

How to calculate a mixed portfolio

Perform this calculation for each property type you manage, then add up the percentages. If the total is equal or greater to 100%, then your mixed portfolio qualifies.

| | | | |
|---------------------------------------|---|----------------|--------------|
| Number of units or sq. ft. you manage | Minimum requirement for the property type | $\times 100 =$ | % of minimum |
|---------------------------------------|---|----------------|--------------|

Sample calculation

| | | | |
|---------------------------------------|---------------------------------------|---------|-----|
| 150 residential units at one site | ÷ 200 units minimum requirement | x 100 = | 75% |
| 75,000 commercial sq. ft. at one site | ÷ 120,000 sq. ft. minimum requirement | x 100 = | 63% |

138% this portfolio qualifies

1) IREM defines a "site" as a property that is a geographically separate facility. If your facilities don't have geographic separation, other factors IREM may consider to establish separate sites are: separate site offices, separate site owners, or separate site financial statements. Generally, managing raw land or a new property under construction does not qualify for experience credit until such time as a certificate of occupancy has been granted. In addition, parking structures, including garages, lots and/or spaces, are not qualifying portfolio types

Managing raw land, a new property under construction and parking garages do not count toward the portfolio requirement

Other requirements

Additional requirements for the CPM designation are as follows:

- **Real estate license** – If you are required by law to hold a real estate license to perform your job in your country or jurisdiction, then you must submit a copy of a valid real estate license to show that you are in compliance with all licensing laws and regulations. If you are not required by law or regulation to hold a real estate license, then no license is required, and you should report this on your CPM application.
- **Application** – You must use this application and the experience forms provided to apply for the CPM. We will not review any experience that is submitted through other documents – such as cover letters, resume, etc.
- **Annual Dues** – Whether you are approved as a CPM Candidate or CPM Designee, you must continue to pay annual membership dues set by IREM every year and abide by the IREM bylaws, policies, and IREM Code of Professional Ethics.

Membership benefits

Membership in IREM brings with it a broad range of benefits. Among them:

- Access to IREM's online library of members-only resource material
- Member discounts of up to 20% on IREM textbooks, research studies, and other publications purchased through IREM Headquarters
- Regular electronic updates from IREM on IREM activities and events as well as industry news
- Opportunities to network with other real estate management professionals – through volunteering on IREM boards and committees, attending IREM meetings or virtually through online forums
- Your listing in the IREM online membership directory of professionals
- Access to a digital badge, a digital version of your CPM pin that you can download and include in your email signatures, on websites, and share on social media
- For CPMs, one complimentary copy of the IREM Income/Expense Analysis® report of your choice, to be received annually. IREM publishes income and expense data on five properties types: conventional apartments, office buildings, federally assisted apartments, shopping centers, and condominiums
- Access to materials to promote yourself as a CPM

CPM Candidacy Option

For those who successfully passed the education and exam requirements, but still need 3 years of qualifying experience – you may submit your CPM Application only if you wish to be approved as a CPM Candidate. As a CPM Candidate member, you will still be invoiced and required to pay Candidate Member dues every year. Once you have 3 years of qualifying experience, then you must submit the experience forms (found in this application) to IREM, to be approved for the CPM Designation.

Institute of Real Estate Management Code of Professional Ethics

Introduction

The purpose of this Code of Professional Ethics is to establish and maintain public confidence in the honesty, integrity, professionalism, and ability of the professional real estate manager. The Institute of Real Estate Management and its Members intend that this Code and performance pursuant to its provisions will be beneficial to the general public and will contribute to the continued development of a mutually beneficial relationship among Certified Property Manager® Members, CPM® Candidates, Accredited Residential Manager® Members, Accredited Commercial Manager Members, Associate Members, and other Members, national and international professional real estate associations and organizations, and clients, employers, and the public. The Institute of Real Estate Management, as the professional society of real estate management, seeks to work closely with all other segments of the real estate industry to protect and enhance the interests of the public. To this end, Members of the Institute have adopted and, as a condition of membership, subscribe to this Code of Professional Ethics.

IREM® Member Pledge

I pledge myself to the advancement of professional real estate management through the mutual efforts of Members of the Institute of Real Estate Management and by any other proper means available to me. I pledge myself to maintain the highest moral and ethical standards consistent with the objectives and higher purpose of the Institute. I pledge myself to seek and maintain an equitable, honorable, and cooperative association with fellow Members of the Institute and with all others who may become a part of my business and professional life. I recognize and support the need to preserve and encourage fair and equitable practices and competition among all who are engaged in the profession of real estate management. I pledge myself to place honesty, integrity, and industriousness above all else and to pursue my gainful efforts with diligent study and ongoing education so that my services shall be beneficial to the general public and my obligations to my clients shall always be maintained at the highest possible level. I pledge myself to comply with the principles and declarations of the Institute of Real Estate Management as set forth in its Bylaws, Statement of Policies, and this Code of Professional Ethics.

Article 1. Loyalty to Client, Firm, and/or Employer

A Certified Property Manager®, CPM® Candidate, Accredited Residential Manager®, Accredited Commercial Manager or Associate Member (hereinafter referred to as MEMBER) shall at all times exercise loyalty to the interests of the client and the employer or firm with whom the MEMBER is affiliated. A MEMBER shall be diligent in the maintenance and protection of the interests and property of the employer and of the client. A MEMBER shall not engage in any activity, that could be reasonably construed as contrary to the interests of the client or employer. If an activity would result in a conflict between the interests of the firm or employer and the interests of the client, then the interests of the client shall take precedence.

Article 2. Confidentiality

A MEMBER shall not disclose to a third party any confidential or proprietary information which would be injurious or damaging to a client concerning the client's business or personal affairs without the client's prior written consent, unless such disclosure is required or compelled by applicable laws and regulations.

Article 3. Accounting and Reporting

Pursuant to the terms of the management agreement, a MEMBER shall use reasonable efforts to provide accurate, auditable financial and business records and documentation concerning each asset managed for the client, which records shall be available for inspection at all reasonable times by the client. A MEMBER shall furnish to the client, at mutually agreed upon intervals, regular reports concerning the client's assets under management. A MEMBER shall not exaggerate, misrepresent, or conceal material facts concerning the client's assets or any related transaction.

Article 4. Protection of Funds

A MEMBER shall at all times serve as a fiduciary for the client and shall not commingle personal or company funds with the funds of a client or use one client's funds for the benefit of another client, but shall keep the client's funds in a fiduciary account in an insured financial institution or as otherwise directed in writing by the client. A MEMBER shall at all times exert due diligence for the maintenance and protection of the client's funds against all reasonably foreseeable contingencies and losses.

Article 5. Relations with Other Members of the Profession

A MEMBER shall not make, authorize or otherwise encourage any false or misleading comments concerning the practices of Members of the Institute of Real Estate Management. A MEMBER shall truthfully represent material facts in their professional activities. A MEMBER shall not exaggerate or misrepresent the services offered as compared with the services offered by other real estate managers. Nothing in this Code, however, shall restrict legal and reasonable business competition by and among real estate managers.

Article 6. Contracts

Any written contract between a MEMBER and a client shall be in clear and understandable terms, and shall set forth the specific terms agreed upon between the parties, including a general description of the services to be provided by and the responsibilities of the MEMBER.

Article 7. Conflict of Interest

A MEMBER shall not represent personal or business interests divergent from or conflicting with those of the client or employer and shall not accept, directly or indirectly, any rebate, fee, commission, discount, or other benefit, monetary or otherwise, which could reasonably be seen as a conflict with the

interests of the client, employer or firm, unless the client or employer is first notified in writing of the activity or potential conflict of interest, and consents in writing to such representation.

Article 8. Managing the Assets of the Client

A shall exercise due diligence in the maintenance and management of the client's assets and shall make all reasonable efforts to protect it against all reasonably foreseeable contingencies and losses.

Article 9. Duty to Former Clients and Former Firms or Employers

All obligations and duties of a MEMBER to clients, firms, and employers as specified in this Code shall also apply to relationships with former clients and former firms and employers. A MEMBER shall act in a professional manner when, for whatever reason, relationships are terminated between a MEMBER and a client and firm or employer. Nothing in this section, however, shall be construed to cause a MEMBER to breach obligations and duties to current clients and firm or employer.

Article 10. Compliance with Laws and Regulations

A MEMBER shall at all times conduct business and personal activities with knowledge of and in compliance with all applicable laws and regulations.

Article 11. Equal Opportunity

A MEMBER shall not deny equal employment opportunity or equal professional services to any person for reasons of race, color, religion, sex, familial status, national origin, age, sexual orientation, or handicap and shall comply with all applicable laws and regulations regarding equal opportunity.

Article 12. Duty to Tenants and Others

A MEMBER shall competently manage the property of the client with due regard for the rights, responsibilities, and benefits of the tenants or residents and others lawfully on the property. A MEMBER shall not engage in any conduct that is in conscious disregard for the safety and health of those persons lawfully on the premises of the client's property.

Article 13. Duty to Report Violations

Each MEMBER has a responsibility to provide the Institute of Real Estate Management with any significant factual information that reasonably suggests that another MEMBER may have violated this Code of Professional Ethics. Such information must be presented as outlined in the Institute of Real Estate Management's Bylaws and Statement of Policies.

Article 14. Enforcement

The interpretation of compliance with this Code is the responsibility of the Ethics and Discipline Committee of the Institute of Real Estate Management. Any violation by a MEMBER of the obligations of this Code and any disciplinary action for violation of any portion of this Code shall be determined and carried out in accordance with and pursuant to the terms of the Bylaws and Statement of Policies of the Institute of Real Estate Management. The result of such disciplinary action shall be final and binding upon the affected MEMBER and without recourse to the Institute, its officers, Governing Councillors, Members, employees, or agents. The pressures of today's competitive market make it difficult to get ahead. You're looking to sharpen your skills and reputation, study the most recent issues and best practices affecting your business, and meet colleagues with whom to share experiences, swap ideas, and discover solutions. You value the great benefits and the distinction that comes with associating with a proven industry leader.

CPM application

Please type or print clearly in English

You must successfully complete the CPM Education (met through IREM courses or a qualifying degree) and Exam requirements before you can submit this CPM application. The South Africa Gauteng Chapter will only forward your application to IREM once both, the Education and Exam, CPM Requirements have been met.

| | | | | | | | |
|---|--|--|--|--|--|---|--|
| Last/ Family Name | | First/Given Name | | Middle Name or Initial | | Gender <input type="checkbox"/> Male <input type="checkbox"/> Female | |
| Company Name | | | | Residence Address | | | |
| Company Address | | | | City/Country/Postal Code | | | |
| City/Country/Postal Code | | | | Residence Telephone | | | |
| Daytime Telephone | | Mailing Address (check one): <input type="checkbox"/> Business <input type="checkbox"/> Residence | | Directory Address (check one): <input type="checkbox"/> Business <input type="checkbox"/> Residence | | | |
| Daytime Fax Number | | Citizenship | | Date of Birth (Month/Day/Year) | | | |
| E-mail Address | | Were you referred by an IREM Member? <input type="checkbox"/> Yes <input type="checkbox"/> No | | If yes, who: | | | |
| Are you proficient in English? <input type="checkbox"/> Yes <input type="checkbox"/> No | | If yes, what is your level of proficiency: <input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Fluent <input type="checkbox"/> Native | | List any other languages you speak and proficiency. | | | |

| | |
|---|---------------------------------------|
| Have you ever taken an IREM course(s)? <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, what is your ID number? _____ |
| If yes, did you take any IREM course under another name? <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, under what name? _____ |
| If yes, what IREM courses have you completed? _____ | |

| | |
|---------------------|---|
| Real Estate License | <input type="checkbox"/> I am required by law to have a real estate license and a copy is enclosed. |
| Check one: | <input type="checkbox"/> I am not required by law to have a real estate license. |

| | |
|---|------|
| Name and Signature of Immediate Supervisor | |
| This verifies the accuracy of the information on this application as to the applicant's current responsibilities. | |
| Name | |
| Signature X | Date |

| | |
|--|---|
| If you hold the CCIM, RPA, CSM, or PCAM designation, you may meet the education requirement. To receive credit, attach verification from the sponsoring organization confirming that you hold the designation and are a member in good standing. | |
| Check here the designations for which you are attaching verification: | <input type="checkbox"/> CCIM <input type="checkbox"/> RPA <input type="checkbox"/> CFM <input type="checkbox"/> CSM <input type="checkbox"/> PCAM <input type="checkbox"/> SIOR <input type="checkbox"/> Not Applicable |

| | |
|---|--|
| If you have a Bachelor's/undergraduate or Master's/graduate degree in real estate or property management from Wits University, you may meet the education requirement. Certificate programs do not qualify. | |
| To receive credit, attach a copy of an official transcript indicating the degree earned. Further documentation may be requested. | |
| Check here the degree credit for which you are attaching a transcript(s): | <input type="checkbox"/> Bachelor's/undergraduate degree in: _____ <input type="checkbox"/> Master's/graduate degree in: _____ <input type="checkbox"/> Not Applicable |

| |
|--|
| When you become a CPM, you will receive your official CPM certificate and pin. |
| Your name exactly as it should appear on your CPM certificate: _____ |

Experience Report for **current** position. If you have no relevant property management experience, leave blank.

| For Period from (month/year) _____ to (month/year) _____ current | Check the boxes below for every function you perform in the capacity of a real estate manager; a minimum of 19 is required. | | | | | | | | | |
|---|---|--------------------------------|-------------------------------|-------|--------------------------------------|-------|--------------------------------------|-------|--|--|
| Your Title | <input type="checkbox"/> 1. Hire, manage, and evaluate site personnel and/or off-site management staff or contracted management firms, directly or through others. | | | | | | | | | |
| Company Name | <input type="checkbox"/> 2. Identify staffing requirements and develop, or approve, job descriptions and/or develop and monitor, or approve, human resource policies, and training and development plans. | | | | | | | | | |
| Number of Employees Reporting Directly to You | <input type="checkbox"/> 3. Identify, implement, and monitor, or approve, sustainable practices; including but not limited to energy use/conservation programs for the property. | | | | | | | | | |
| Titles of Positions Reporting Directly to You | <input type="checkbox"/> 4. Determine which items or services are to be purchased for the property, prepare specifications, solicit and evaluate bids for contract services, negotiate or approve contracts, and monitor contracts. | | | | | | | | | |
| Name of Immediate Supervisor | <input type="checkbox"/> 5. Oversee operation of building systems, supervise employees or monitor contractors who perform routine maintenance and repair work, and/or oversee planning and construction of tenant improvements and interior design. | | | | | | | | | |
| Title of Immediate Supervisor | <input type="checkbox"/> 6. Design, implement, and monitor or approve, routine and preventive maintenance programs for the property. | | | | | | | | | |
| Portfolio You Manage - both columns required: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; text-align: center;">Total Number of Units or Square Meters</th> <th style="width: 50%; text-align: center;">Total Number of Sites or Bldgs</th> </tr> </thead> <tbody> <tr> <td>Residential: (Units) _____</td> <td>_____</td> </tr> <tr> <td>Commercial: (Square Meters) _____</td> <td>_____</td> </tr> <tr> <td>Industrial: (Square Meters) _____</td> <td>_____</td> </tr> </tbody> </table> | Total Number of Units or Square Meters | Total Number of Sites or Bldgs | Residential: (Units) _____ | _____ | Commercial: (Square Meters) _____ | _____ | Industrial: (Square Meters) _____ | _____ | <input type="checkbox"/> 7. Establish or maintain and enforce the property's operating policies and procedures and occupancy/usage guidelines. | |
| | Total Number of Units or Square Meters | Total Number of Sites or Bldgs | | | | | | | | |
| | Residential: (Units) _____ | _____ | | | | | | | | |
| | Commercial: (Square Meters) _____ | _____ | | | | | | | | |
| Industrial: (Square Meters) _____ | _____ | | | | | | | | | |
| <input type="checkbox"/> 8. Establish, maintain, and monitor adherence to, or approve, the property's record keeping system. | | | | | | | | | | |
| <input type="checkbox"/> 9. Identify, analyze, and implement, or approve, capital improvement or replacement programs, including but not limited to maintenance or remodeling programs, resident/tenant improvements, and amenity enhancements. | | | | | | | | | | |
| <input type="checkbox"/> 10. Perform regular property inspections and take appropriate action in accordance with established policies and procedures. | | | | | | | | | | |
| <input type="checkbox"/> 11. Design and implement, or approve, resident/tenant retention, orientation, and property familiarization programs. | | | | | | | | | | |
| <input type="checkbox"/> 12. Communicate routinely with occupants of the property concerning level of service and other management matters and/or investigate and resolve resident/tenant complaints. | | | | | | | | | | |
| <input type="checkbox"/> 13. Administer the leasing and lease renewal process and/or negotiate or approve leases, including assessing the financial impact of the lease. | | | | | | | | | | |
| <input type="checkbox"/> 14. Prepare, market, and show leasable space. | | | | | | | | | | |
| <input type="checkbox"/> 15. Develop, implement, and monitor, a marketing plan and/or leasing plan for the property. | | | | | | | | | | |
| <input type="checkbox"/> 16. Analyze market conditions and recommend or approve the property's rental rates. | | | | | | | | | | |
| <input type="checkbox"/> 17. Design, implement, or approve life-safety and emergency preparedness programs for the property. | | | | | | | | | | |
| <input type="checkbox"/> 18. Develop, implement, or approve a risk management program for the property to mitigate the property's insurable risk and/or identify the property's insurable risks and recommend, secure and monitor insurance coverage. | | | | | | | | | | |
| <input type="checkbox"/> 19. Recommend and/or initiate legal actions for violations of leases, contracts or governing documents, including but not limited to evictions and filing of liens. | | | | | | | | | | |
| <input type="checkbox"/> 20. Ensure the property's compliance with government and environmental regulations. | | | | | | | | | | |
| <input type="checkbox"/> 21. Process, and/or monitor, or approve property payables. | | | | | | | | | | |
| <input type="checkbox"/> 22. Supervise property collections, including the handling of property receipts, journal entries, records of account, bank deposits, and delinquent accounts. | | | | | | | | | | |
| <input type="checkbox"/> 23. Prepare, present, and implement annual property budgets, including capital expenditure budgets, or review, authorize, and monitor such budgets prepared by others. | | | | | | | | | | |
| <input type="checkbox"/> 24. Prepare, analyze, and/or approve the property's financial and operating statements and variance reports. | | | | | | | | | | |
| <input type="checkbox"/> 25. Approve major deviations from the budget, exclusive of emergencies. | | | | | | | | | | |
| <input type="checkbox"/> 26. Identify and analyze the property's financial requirements and financing options, and/or replacement reserve requirements, and recommend funding sources to the owner. | | | | | | | | | | |
| <input type="checkbox"/> 27. Estimate and monitor the market value of the property and assess the implications that estimates of value have on the owner; determine the reasonableness of assessed value and insurable value. | | | | | | | | | | |
| <input type="checkbox"/> 28. Identify, analyze alternate uses of the property and implement or approve a plan to change the property's use (e.g., converting a residential building to commercial use). | | | | | | | | | | |
| <input type="checkbox"/> 29. Identify, analyze, and propose property improvements relative to the future value and return on investment. | | | | | | | | | | |
| <input type="checkbox"/> 30. Establish or maintain management controls and analyze the property's performance. | | | | | | | | | | |
| <input type="checkbox"/> 31. Determine the goals and objectives of the property owner. | | | | | | | | | | |
| <input type="checkbox"/> 32. Evaluate real estate tax assessments and recommend an appeal strategy to the owner when appropriate. | | | | | | | | | | |
| <input type="checkbox"/> 33. Prepare a management plan for the property. | | | | | | | | | | |
| <input type="checkbox"/> 34. Identify and recommend or approve other sources of income for the property and implement programs accordingly. | | | | | | | | | | |
| <input type="checkbox"/> 35. Acquire new clients, and/or establish and maintain client relationship(s). | | | | | | | | | | |
| <input type="checkbox"/> 36. Fulfill the company's contractual obligations including, recommending, implementing, and managing modifications for management contracts and/or governing documents. | | | | | | | | | | |
| Total Functions Performed: <input style="width: 150px;" type="text"/> | | | | | | | | | | |

Experience Report for **previous** position. If you have no previous relevant property management experience, leave blank.

| | | |
|--|--|--|
| For Period from (month/year) _____ to (month/year) _____ | | <p>Check the boxes below for every function you perform in the capacity of a real estate manager; a minimum of 19 is required.</p> <p><input type="checkbox"/> 1. Hire, manage, and evaluate site personnel and/or off-site management staff or contracted management firms, directly or through others.</p> <p><input type="checkbox"/> 2. Identify staffing requirements and develop, or approve, job descriptions and/or develop and monitor, or approve, human resource policies, and training and development plans.</p> <p><input type="checkbox"/> 3. Identify, implement, and monitor, or approve, sustainable practices; including but not limited to energy use/conservation programs for the property.</p> <p><input type="checkbox"/> 4. Determine which items or services are to be purchased for the property, prepare specifications, solicit and evaluate bids for contract services, negotiate or approve contracts, and monitor contracts.</p> <p><input type="checkbox"/> 5. Oversee operation of building systems, supervise employees or monitor contractors who perform routine maintenance and repair work, and/or oversee planning and construction of tenant improvements and interior design.</p> <p><input type="checkbox"/> 6. Design, implement, and monitor or approve, routine and preventive maintenance programs for the property.</p> <p><input type="checkbox"/> 7. Establish or maintain and enforce the property's operating policies and procedures and occupancy/usage guidelines.</p> <p><input type="checkbox"/> 8. Establish, maintain, and monitor adherence to, or approve, the property's record keeping system.</p> <p><input type="checkbox"/> 9. Identify, analyze, and implement, or approve, capital improvement or replacement programs, including but not limited to maintenance or remodeling programs, resident/tenant improvements, and amenity enhancements.</p> <p><input type="checkbox"/> 10. Perform regular property inspections and take appropriate action in accordance with established policies and procedures.</p> <p><input type="checkbox"/> 11. Design and implement, or approve, resident/tenant retention, orientation, and property familiarization programs.</p> <p><input type="checkbox"/> 12. Communicate routinely with occupants of the property concerning level of service and other management matters and/or investigate and resolve resident/tenant complaints.</p> <p><input type="checkbox"/> 13. Administer the leasing and lease renewal process and/or negotiate or approve leases, including assessing the financial impact of the lease.</p> <p><input type="checkbox"/> 14. Prepare, market, and show leasable space.</p> <p><input type="checkbox"/> 15. Develop, implement, and monitor, a marketing plan and/or leasing plan for the property.</p> <p><input type="checkbox"/> 16. Analyze market conditions and recommend or approve the property's rental rates.</p> <p><input type="checkbox"/> 17. Design, implement, or approve life-safety and emergency preparedness programs for the property.</p> <p><input type="checkbox"/> 18. Develop, implement, or approve a risk management program for the property to mitigate the property's insurable risk and/or identify the property's insurable risks and recommend, secure and monitor insurance coverage.</p> <p><input type="checkbox"/> 19. Recommend and/or initiate legal actions for violations of leases, contracts or governing documents, including but not limited to evictions and filing of liens.</p> <p><input type="checkbox"/> 20. Ensure the property's compliance with government and environmental regulations.</p> <p><input type="checkbox"/> 21. Process, and/or monitor, or approve property payables.</p> <p><input type="checkbox"/> 22. Supervise property collections, including the handling of property receipts, journal entries, records of account, bank deposits, and delinquent accounts.</p> <p><input type="checkbox"/> 23. Prepare, present, and implement annual property budgets, including capital expenditure budgets, or review, authorize, and monitor such budgets prepared by others.</p> <p><input type="checkbox"/> 24. Prepare, analyze, and/or approve the property's financial and operating statements and variance reports.</p> <p><input type="checkbox"/> 25. Approve major deviations from the budget, exclusive of emergencies.</p> <p><input type="checkbox"/> 26. Identify and analyze the property's financial requirements and financing options, and/or replacement reserve requirements, and recommend funding sources to the owner.</p> <p><input type="checkbox"/> 27. Estimate and monitor the market value of the property and assess the implications that estimates of value have on the owner; determine the reasonableness of assessed value and insurable value.</p> <p><input type="checkbox"/> 28. Identify, analyze alternate uses of the property and implement or approve a plan to change the property's use (e.g., converting a residential building to commercial use).</p> <p><input type="checkbox"/> 29. Identify, analyze, and propose property improvements relative to the future value and return on investment.</p> <p><input type="checkbox"/> 30. Establish or maintain management controls and analyze the property's performance.</p> <p><input type="checkbox"/> 31. Determine the goals and objectives of the property owner.</p> <p><input type="checkbox"/> 32. Evaluate real estate tax assessments and recommend an appeal strategy to the owner when appropriate.</p> <p><input type="checkbox"/> 33. Prepare a management plan for the property.</p> <p><input type="checkbox"/> 34. Identify and recommend, or approve other sources of income for the property and implement programs accordingly.</p> <p><input type="checkbox"/> 35. Acquire new clients, and/or establish and maintain client relationship(s).</p> <p><input type="checkbox"/> 36. Fulfill the company's contractual obligations; including, recommending, implementing, and managing modifications for management contracts and/or governing documents.</p> |
| Your Title _____ | | |
| Company Name _____ | | |
| Number of Employees Reporting Directly to You _____ | | |
| Titles of Positions Reporting Directly to You _____ | | |
| Name of Immediate Supervisor _____ | | |
| Title of Immediate Supervisor _____ | | |
| Portfolio You Manage – both columns required: | | |
| Residential: (Units) _____ | Total Number of Units or Square Meters _____ Total Number of Sites or Bldgs _____ | |
| Commercial: (Square Meters) _____ | _____ | |
| Industrial: (Square Meters) _____ | _____ | |
| Briefly describe your portfolio and position in a narrative form. This must be included for your application to be complete. (Attach additional sheet only if necessary) | | |
| For IREM use only: Total Functions Performed _____ | | |

Please answer the questions below. If you answer "yes" to any of the questions, provide a detailed, written explanation on an attached sheet.

- Yes No Have you ever been involved in a reorganization for the benefit of creditors or in personal or business bankruptcy proceedings as a debtor?

- Yes No Have you ever been involved in either civil or criminal legal proceedings as a defendant in which there were allegations of fraud, misrepresentation, misappropriation of funds or property, etc.?
- Yes No Have you ever been refused bonding?

- Yes No Have you ever been subject to disciplinary action by the Institute of Real Estate Management, the NATIONAL ASSOCIATION OF REALTORS®, or any other professional association?

- Yes No Have you ever had your real estate license suspended or revoked or otherwise been subject to disciplinary action by any real estate licensing agency?

Please read these rules and regulations before signing and submitting this CPM Application.

In connection with the Institute of Real Estate Management, upon submission of application for the CPM designation, I agree that:

- A. All of the information provided by me is complete and correct to the best of my knowledge and belief. If I made or at any time make any statement with knowledge of its falsity, I understand that it shall be cause for denial of CPM or CPM Candidate status and membership in the Institute. I further agree to submit to the jurisdiction of the IREM Ethics and Discipline Committee in the event that allegations of unethical or improper conduct arise during the pendency of this application.
- B. All additional information that may be needed by IREM shall be supplied by me upon request.
- C. I shall conduct my real estate management activities in accordance with the IREM Code of Professional Ethics and shall also be bound by the bylaws and policies of the Institute as they are now or as they may be amended from time to time subsequent to this application and the decisions of any Institute committee and the Governing Council affecting my membership in the Institute.
- D. I agree that the Institute may censure, suspend, expel, or otherwise terminate this membership, if granted, in accordance with the Institute's bylaws, policies, and item A above, and that the Institute, its officers, members, employees, and agents may disclose its actions, in full or part, to the members of the Institute and the general public.
- E. I shall pay annual dues and fees as set by the Institute in order to retain my rights to use the CPM designation.
- F. I, for and on behalf of myself, and my heirs, assigns, administrators, and each of them waive and forever release all claims and demands, or causes of action and each of them, that I or they may have now or may in the future have against the Institute, its members, its officers, councilors, employees, chapters, or others who may supply information or material to the Institute, and each of them, for any act or omission of the Institute, its members, its officers, councilors, employees, chapters, or any others and each of them including but not in any way limited to its or their acts or omissions in granting candidacy or CPM membership in the Institute, failing to grant candidacy or CPM membership, or in censuring, suspending, expelling, or terminating such a candidacy or CPM membership.
- G. The Institute shall take necessary and appropriate steps to verify all information provided on my CPM application.
- H. I hereby confirm that I am not a vendor, supplier, or service provider to the real estate industry.

- I. I acknowledge that as a CPM, I will be licensed to use the CPM® trademarks to indicate such membership, and I agree to abide by the rules of the Institute of Real Estate Management governing use of those trademarks. **I understand that I cannot use the CPM trademarks until I have completed the Designation requirements and have been notified in writing that is has been officially awarded to me. Such misuse will cause the summary termination of my membership.**

Your signature verifies the accuracy of the information on this application, acknowledges that you have read the rules and regulations stated above, and confirms that your application is complete.

Signature **X** _____ Date _____