Candidate Guidance Workshop



THE CCIM INSTITUTE
Northern Nevada Chapter

What is CCIM?

- What does it stand for?
  - Certified Commercial Investment Member

67%

of CCIM designees hold the title of owner, partner, principal, president, vice president, or broker.



42%

CCIMs average 42% more transactions annually than a typical brokerage specialist.



95%

of CCIM members said the CCIM designation is important to their careers.



Who can qualify to become a CCIM?

- Commercial Real Estate Broker/Agent/Investor/Leasing
- Residential Investment
- Mortgage/Finance
- Asset/Portfolio Manager
- Managing Brokers/Owners
- Consultants/Exchange Facilitators
- Developer
- Corporate Executives

Identify your specific profession and follow the guidelines in the portfolio handbook

The CCIM Institute



Mission Statement

The mission of the CCIM Institute is to elevate our members to the highest levels of success in the commercial real estate profession.



Vision Statement

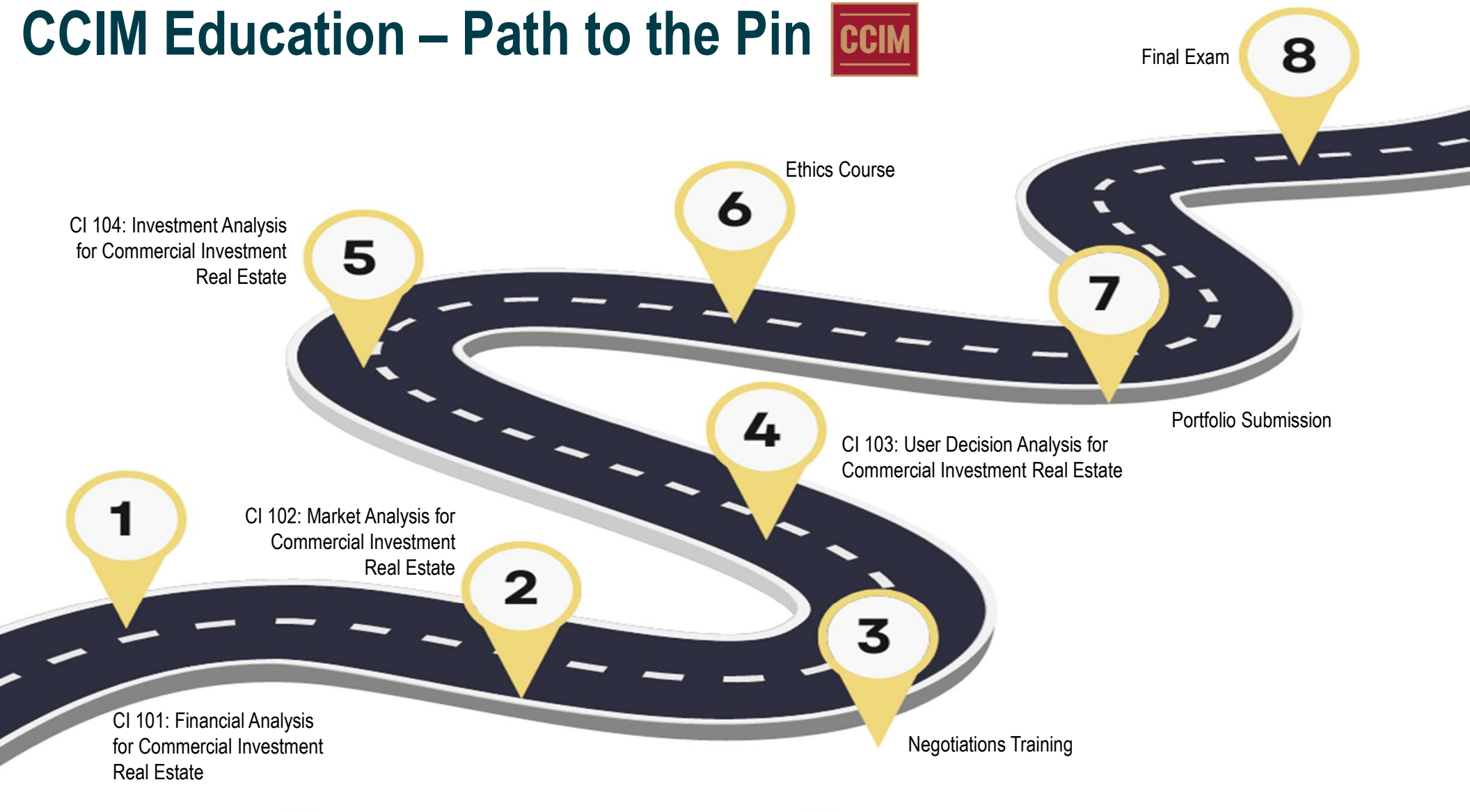
To shape the future of the commercial real estate industry by being the most influential & internationally recognized innovators.

Scholarships Available



THE CCIM INSTITUTE
Northern Nevada Chapter

CCIM Education – Path to the Pin



Save $$$ - Local Classes



THE CCIM INSTITUTE
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CCIM Institute Facts

There are **four formats** for Institute courses:

1. In Class
2. Online, instructor led
3. Online, self paced
4. Blended

All final exams are administered online.
Core courses (CI 101-104) are offered in all formats.
Ward Center courses are offered in-class and online, instructor-led.

Designation Requirements

To earn the CCIM designation through the general candidacy program you must complete the following:

I. **Become a member of the Institute**.

Institute membership is required prior to submitting the Portfolio of Qualifying Experience and sitting for the Comprehensive Exam. Students are encouraged to become members as soon as they start the program to take advantage of the tuition discounts, STDB, and other benefits.

II. **Successfully complete the Designation Courses**:

a. **CI 101**: Financial Analysis – This is a pre-requisite for all designation courses except Ethics.
b. **CI 102**: Market Analysis
c. **Eight hours of negotiations* training through one of these two courses:**
    i. **Preparing to Negotiate** (online, self-paced)
    -or-
    i. **Commercial Real Estate Negotiations** (in-class)
    *This is a pre-requisite for CI103 and CI104.
d. **CI 103:** User Decision Analysis
e. **CI 104:** Investment Analysis
f. **Ethics Course** (online)

Designation Requirements

III. **Earn two elective credits**. Credits can be earned through non-designation courses, taking the Course Concepts Review (CCR), and for every 12-months of continuous membership. A full list of qualifying electives is online. (Foundations for Success is a great one to start with also).

III. **Submit the portfolio of qualifying experience**. The portfolio may be submitted any time after the completion of the CI101 and before registering for the Comprehensive Exam. The portfolio has to be approved before taking the Comprehensive Exam. (Information on the requirements can be found in the portfolio handbook.)

III. **Pass the Comprehensive Exam**. This is offered twice a year in the U.S. at various locations.

Fast Track and University Fast Track

Fast Track = Professionals with these designations can apply for the Fast Track Program:

- AACI
- CLO
- CMB
- CRF
- CRE
- FRI - Proof of qualifying commercial real estate activities is required
- MAI/SRPA
- RICS (MRICS or FRICS)
  - *RICS members with 10 or more years of experience are eligible for the RICS Direct Track.*
- RPA
- CPM
- SIOR

Fast Track members need to complete the six designation courses and sit for the Comprehensive Exam with 24 months from starting the program. **The elective credit and portfolio requirements are waived**.

Fast Track and University Fast Track

University Fast Track

- Graduates of real estate master's programs from approved colleges and universities **can receive credit for three CCIM core courses - CI 101, CI 102, CI103 or CI 104 - and have the elective credit requirement waived**.

- University Fast Track members need to complete one core course (CI 103 or CI 104 depending on the university program they graduated from), Ethics, eight hours of negotiation training, submit a portfolio, and sit for the Comprehensive Exam with 24 months from starting the program.

Membership

Membership with the CCIM Institute is $695 for a calendar year for U.S. members. New members pay prorated dues based on the month they join. The local chapter is an additional $175

Candidates	Designees
· Tuition discounts on all Institute courses · Free access STDB – Platinum level · MailBridge – receive & manage e-blasts from designees · Subscription to the Institute's award- winning magazine: Commercial Investment Real Estate (CIRE) · Free web conferences · Discounts on conferences · CCIM Quarterly Market Trends	· Life After the Pin (LAP) tuition discounts on core courses · Free access STDB – Platinum level + additional reports · MailBridge – send messages to all CCIM members · Subscription to the Institute's award- winning magazine: Commercial Investment Real Estate (CIRE) · Free web conferences · Discounts on conferences · CCIM Quarterly Market Trends · Designation promotion materials · Find-A-Professional Directory

Non-Transactional Roles

- Active Managers of Commercial Investment Real Estate
  - Representatives/Agents
- Commercial Investment Real Estate Active Advisor
  - ($500,000 in fees)
- *Non-Transactional Professionals - Asset Managers/Corporate RE Exec, etc. (large commercial organizations)*

Non-Qualifying Activities

- Apartment Management and Apartment/Residential Leasing
- Assumption Loans
- Construction/Building, Space Planning, Remodeling, Project Management of commercial or investment real estate
- Sale of Businesses
- Land: sales of less than four single-family unimproved lots i.e. residential land
- Leasing of self storage units, boat slips, billboards
- Mortgage financing on residential property of four or less units.
- Property Management Duties
- Referral fees from any source including commercial real estate
- Secondary or underlying loans of commercial real estate
- The sale or purchase or exchange of personal residences
- Auctioning of Real Estate - may qualify if certain functions were performed (see Exchange/Sales/Acquisition)
- Academic analysis/consulting/coursework
- Real Estate Notes (mortgage)
- Flipping houses
- Broker Opinion of value
- Residential appraisals
- Investment Activities (REITS, Stock Funds, Limited Partnerships, etc.)
- All residential investments leases, including apartment lease condominiums and student housing

Other activities not listed here may not qualify. If you have a question on Qualification, please review the Portfolio Handbook.

Questions About Qualifications

The Portfolio Handbook is your main resource for compiling your Portfolio of Qualifying Experience.

Portfolio Types

- **Streamlined** – The Streamlined Portfolio is *only* available for Commercial Real Estate Professionals with **five (5) or more consecutive full-time years in the commercial real estate industry**.

- **Traditional -** The Traditional Portfolio is for those Commercial Real Estate Professionals with a minimum of 2 years full time experience in **the commercial real estate industry.**

- **Streamlined Non-Transactional** -This category is made up of those high-level full time commercial professionals at large companies whose primary function is a substantial contribution to commercial property which does not include brokering actual transactions. **Five (5) or more consecutive years from date of application in same role / leadership responsibility is required to submit under this category.**

Streamlined

- Submit Streamlined online application
- Submit a professional resume of real estate experience (employment history)
- Submit a summary of your qualifying activities, transactions, projects or work products
- Submit a signed and notarized Affidavit from CFO, CPA or Managing Broker (Affidavits are returned to the candidate for uploading)
- Provide a detailed explanation of role and responsibilities in your position
- Provide three recommendation forms from a:
- CCIM Designee (who does not work in the same firm or is related to you)
- Client (someone whom you have worked for in a professional capacity)
- Local chapter representative (or authorized representative)

Traditional

- Submit traditional online application
- Submit a professional resume of real estate experience (employment history)
- Submit activity data form for each activity
- Submit a summary of qualifying activities, transaction, projects or work products
- Provide copies of closing or settlement for each activity
- Provide a detailed explanation of role and responsibilities in your position
- Provide a recommendation from the local chapter representative (or authorized representative)
- Provide at **least two proofs** of material participation in each activity.

Streamlined/Non-Traditional

- This category consists of those high-level full-time commercial professionals whose primary function is a substantial contribution to commercial property that does not include brokering actual transactions; thus no volume is applicable. *Five or more consecutive years in the same role/leadership responsibility at the time of submission is required to submit under this category.* This category includes:
  - Bank and Trust Real Estate Asset Managers/Institutional Portfolio Managers
  - Large and Institutional Corporate Real Estate Department (Leaders/Officers/Managers/CPA firms)
  - Managing Brokerage Officers/Managers of large firms (supervising 20+ fulltime commercial agents)
  - Large Public Private Venture Program Directors/Managers/Specialists

Streamlined/Non-Traditional

- Required Contents:

- Streamlined Non-Transactional Application
- Professional Resume of real estate experience (employment history)
- Signed and notarized Affidavit which includes verification of at least five years in the same role
- Detailed explanation of Role and Responsibilities in your position
- Company Organizational Chart
- Three letters of recommendation:
  - **CCIM Designee** (who does not work in the same firm and not related to you)
  - **Client** (someone whom you have worked for in a professional capacity)
  - **Local Chapter Representative** (an authorized representative)

Volume Qualifications

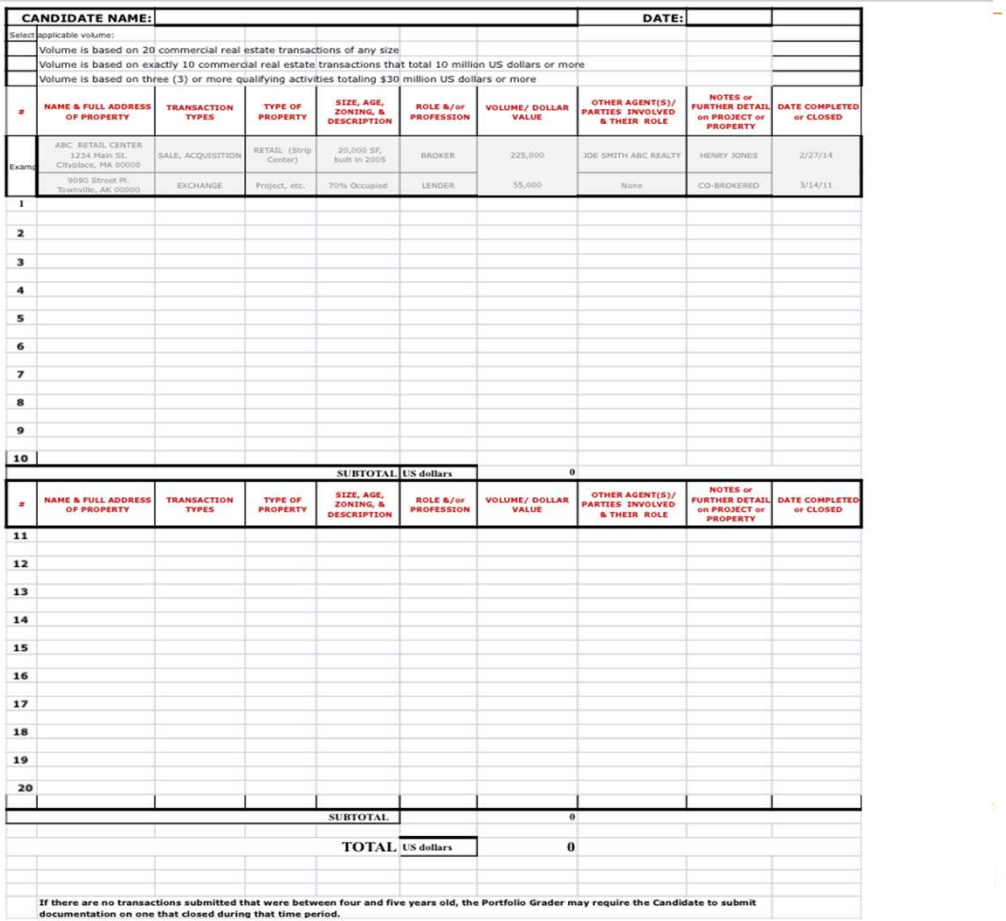
- Volume is based on 20 commercial real estate transactions of any size

or

- Exactly 10 commercial real estate transactions that total 10 million US dollars or more

or

- Three (3) or more qualifying activities totaling $30 million US dollars or more



CANDIDATE NAME:						DATE:		
Select applicable volume:								
	Volume is based on 20 commercial real estate transactions of any size							
	Volume is based on exactly 10 commercial real estate transactions that total 10 million US dollars or more							
	Volume is based on three (3) or more qualifying activities totaling $30 million US dollars or more							
#	NAME & FULL ADDRESS OF PROPERTY	TRANSACTION TYPES	TYPE OF PROPERTY	SIZE, AGE, ZONING, & DESCRIPTION	ROLE &/or PROFESSION	VOLUME/ DOLLAR VALUE	OTHER AGENT(S)/ PARTIES INVOLVED & THEIR ROLE	NOTES or FURTHER DETAIL on PROJECT or PROPERTY	DATE COMPLETED or CLOSED
Example	ABC RETAIL CENTER 1234 Main St. Cityplace, MA 00000	SALE, ACQUISITION	RETAIL (Strip Center)	20,000 SF, built in 2005	BROKER	225,000	JOE SMITH ABC REALTY	HENRY JONES	2/27/14
	9090 Street Pl. Townville, AK 00000	EXCHANGE	Project, etc.	70% Occupied	LENDER	55,000	None	CO-BROKERED	3/14/11
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
				SUBTOTAL	US dollars	0			
#	NAME & FULL ADDRESS OF PROPERTY	TRANSACTION TYPES	TYPE OF PROPERTY	SIZE, AGE, ZONING, & DESCRIPTION	ROLE &/or PROFESSION	VOLUME/ DOLLAR VALUE	OTHER AGENT(S)/ PARTIES INVOLVED & THEIR ROLE	NOTES or FURTHER DETAIL on PROJECT or PROPERTY	DATE COMPLETED or CLOSED
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
				SUBTOTAL		0			
				TOTAL	US dollars	0			

If there are no transactions submitted that were between four and five years old, the Portfolio Grader may require the Candidate to submit documentation on one that closed during that time period.

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Northern Nevada Chapter

Traditional Portfolio – (first 2 pages of Activity Data Form)

Activity #_____

CCIM Institute
Commercial Real Estate's Global Standard for Professional Achievement

Activity Data Form
for Traditional Portfolio Submissions

An Activity Data form is required for each transaction/activity you are including. If submitting a hardcopy portfolio, use this form as the first page as the first page of every activity. Title each activity and use the same name and activity number as on your Summary of Qualifying Activities. Please note that this activity data form is being used for all commercial professions. It is understood that not all questions work for everyone. Please adapt them to fit your case and answer as completely as possible.

Activity #:

Candidate Information
Please fill out this information with your responsibilities, position, etc. as it was at the time of the activity.

Full Name: _____ Position in Company: _____

Company: _____

Company Address: _____

City: _____ State/Province: _____ Postal Code: _____ Country: _____

Business Phone: _____ Cell Phone: _____

Email: _____

Supervisor's Name: _____ Supervisor's Position in Company: _____

Supervisor's Business Phone: _____ Supervisor's Email: _____

Subject Property

Property Name: _____

Property Address: _____

City: _____ State/Province: _____ Postal Code: _____ Country: _____

Year Built: _____ Occupancy at Sale: _____ % Size: _____ square feet

New or Resale: _____ # of Units: _____ Land area: _____ acres

Type: ☐ Office ☐ Retail ☐ Industrial ☐ Multifamily ☐ Hospitality
☐ Project ☐ Residential Investment ☐ Other (describe): _____

Activity #_____

Activity

Date Activity Completed: _____

Profession:	☐ Sale/Purchase/ Exchange	☐ Leasing Broker of CRE	☐ Developer of CRE	☐ Broker of CRE	☐ Consultant of CRE
	☐ Residential Investor	☐ Active Advisor of CRE	☐ Corporate Officer of CRE	☐ Other (describe):	
Buyer:	☐ Insurance Company	☐ Pension Fund	☐ Bank	☐ REIT	☐ Credit Corporation
	☐ LTD Partnership	☐ Government	☐ Developer	☐ Owner-User	☐ Foreigner
	☐ Private Investor	☐ Other (describe):			
Seller:	☐ Insurance Company	☐ Pension Fund	☐ Bank	☐ REIT	☐ Credit Corporation
	☐ LTD Partnership	☐ Government	☐ Developer	☐ Owner-User	☐ Foreigner
	☐ Private Investor	☐ Other (describe):			

Mortgage Amount: $ _____ Interest Rate: _____ % Terms: _____ years

Capitalization Rates: Initial Cap Rate _____ % IRR: _____ %

In the following sections you must address each of the following:

- Explain the activity from its inception to completion.
- Explain your role in the activity and the perspective from which the case study was written.
- Describe how you achieved or helped to achieve the principal's goal(s) and objective(s).
- Discuss alternative courses of action that were available, how they were evaluated, and the basis on which the ultimate course of action was selected and other alternatives were rejected.
- Describe the negotiation process and/or recommended course of action, including the decision criteria and decision points.
- Detail the financing structure if applicable, including how it was selected and the benefits of choosing that form of financing.

Use as much space as necessary to answer the questions below. There is no right amount of pages, include what is necessary and be clear and precise with your information.

Client's Goals & Objectives

Traditional Portfolio

Examples of proofs of material participation:

- Commission checks
- Signature on settlement or closing documents
- Copy of deed showing Candidate as grantee or grantor
- Signed listing agreement with Candidate's name
- Notarized statement from client or supervisor
- Correspondence/proof of significant involvement in transaction

CCIM Institute
Commercial Real Estate's Global Standard for Professional Achievement

Chapter Recommendation for CCIM Designation

Candidate Full Name: _____ Date: _____

CANDIDATES:
Insert your name and today's date on the line above and send a copy of this Recommendation Report to an approved chapter representative in your area. Your Portfolio of Qualifying Experience cannot be reviewed until all required documents, including this recommendation, has been received by CCIM Institute.

This chapter recommendation must be filled out by an approved chapter representative. Please visit http://portfolio.ccim.com/pdf/Auth_Chap_Reps.pdf to find an Authorized Chapter Representative. **Chapter recommendations received from individuals not on this list may not be accepted.**

RECOMMENDATION:

- The above named applicant is requesting that you provide an official recommendation to support his/her online résumé of experience.
- Applicants are required to submit a number of documents that demonstrate they have achieved the designation criteria and standards adopted by CCIM.
- These documents include recommendation statements by current CCIM Designees and Clients.
- This form, when completed with the requested information, will constitute a statement by which you will be attesting to the professional qualifications of the applicant.
- Chapter Recommendations should be from an Authorized Representative.
- If not familiar with the applicant the chapter authorized representative should arrange an interview (in-person or by phone) or establish other criteria for the recommendation.

Did you have a face-to-face or a phone verification session with the candidate?	☐ Yes	☐ No
Did the candidate provide a copy of a professional résumé?	☐ Yes	☐ No
Did you discuss the work history and commercial background?	☐ Yes	☐ No
Did the candidate adequately provide details of his/her role over the past five years?	☐ Yes	☐ No
Did the candidate provide a copy of the summary of qualifying activity?	☐ Yes	☐ No
Did the candidate provide transaction volume that meets with the requirement?	☐ Yes	☐ No
Does the candidate adequately understand the CCIM skills and their use in commercial activity?	☐ Yes	☐ No

Do you have knowledge or reason to believe that this candidate has misused his/her candidacy status? If yes, please describe below. ☐ Yes ☐ No

Please provide any other thoughts or comments that you feel relative to the candidate and will assist the grader in understanding the commercial qualifications.

After completing this form, DO NOT RETURN TO THE APPLICANT – Please email to designation@ccim.com . If any of your answers exceed the space available below the question, please continue your answer on a separate sheet of paper and include it with your response.

RECOMMENDATION
The information that I have provided in this Recommendation Report is, to the best of my knowledge, true and correct.

By signing this document, I…

☐ …**do recommend** this candidate for the CCIM designation.

☐ …**do not recommend** this candidate for the CCIM designation.

Signature (required): _____ Date: _____

Printed Name: _____

Chapter Name: _____ City, State: _____

Business Phone: _____ Email Address: _____

Send this form -- IN CONFIDENCE -- directly to the CCIM Designation Department
Email: designation@ccim.com
Fax: 312-981-7889
Questions? Call (312) 321-4517

Getting Started- Online Submission

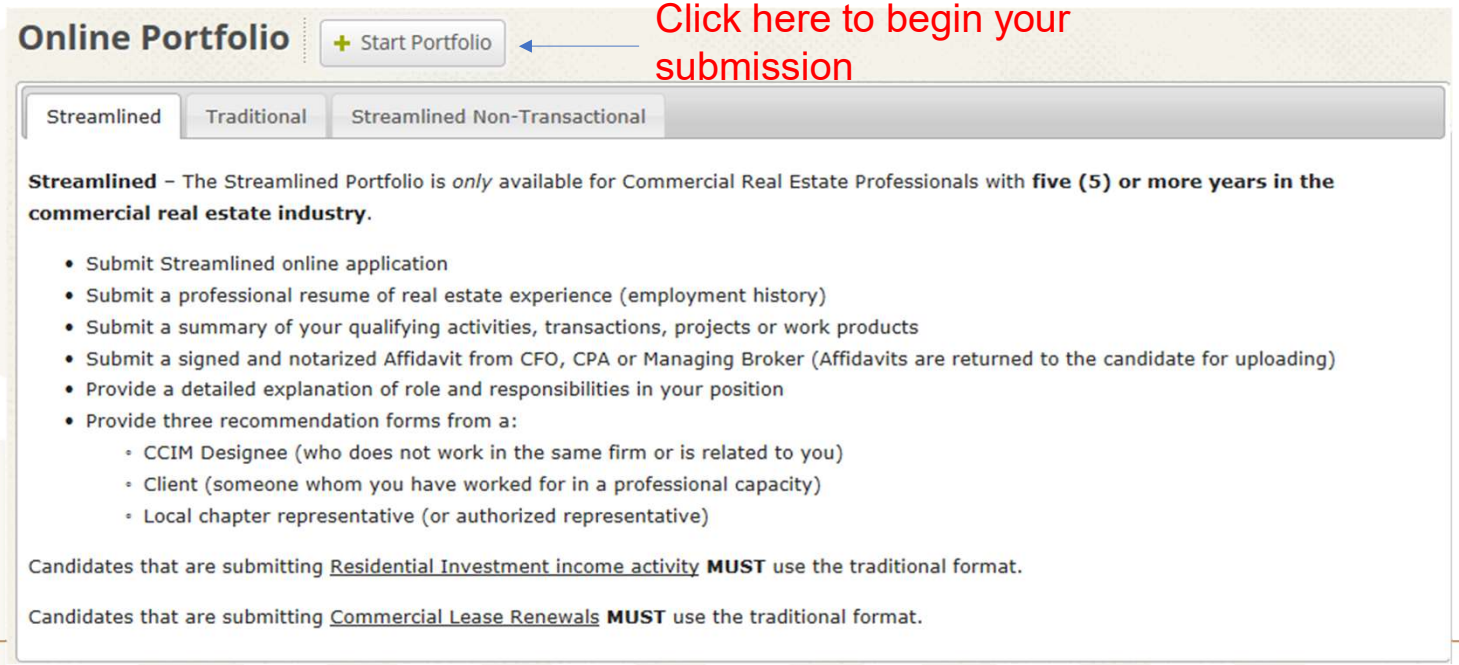
You can access your Online Portfolio account by going directly to http://portfolio.ccim.com to login.

Experiencing issues? Contact the Designation Department at 312-321-4517



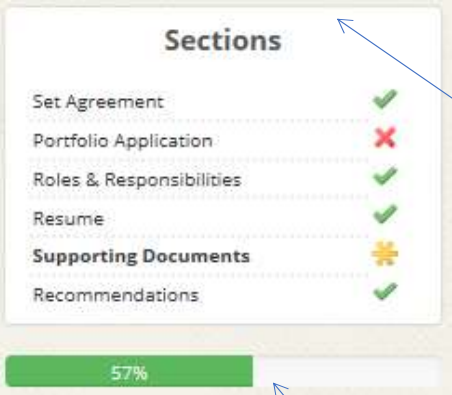
Begin Portfolio

Click “Start Portfolio” to begin your submission. You will have the opportunity to save your work and login later to continue.

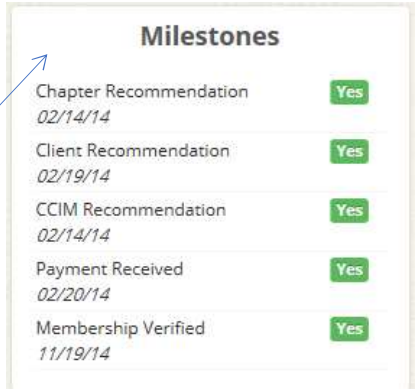


Helpful Tools

These tools will appear throughout the upload process.



Shows what documents you have uploaded, have not uploaded and are currently working on. Each title will take you to that document location.



Shows receipt of membership payment, submission fee payment and recommendations

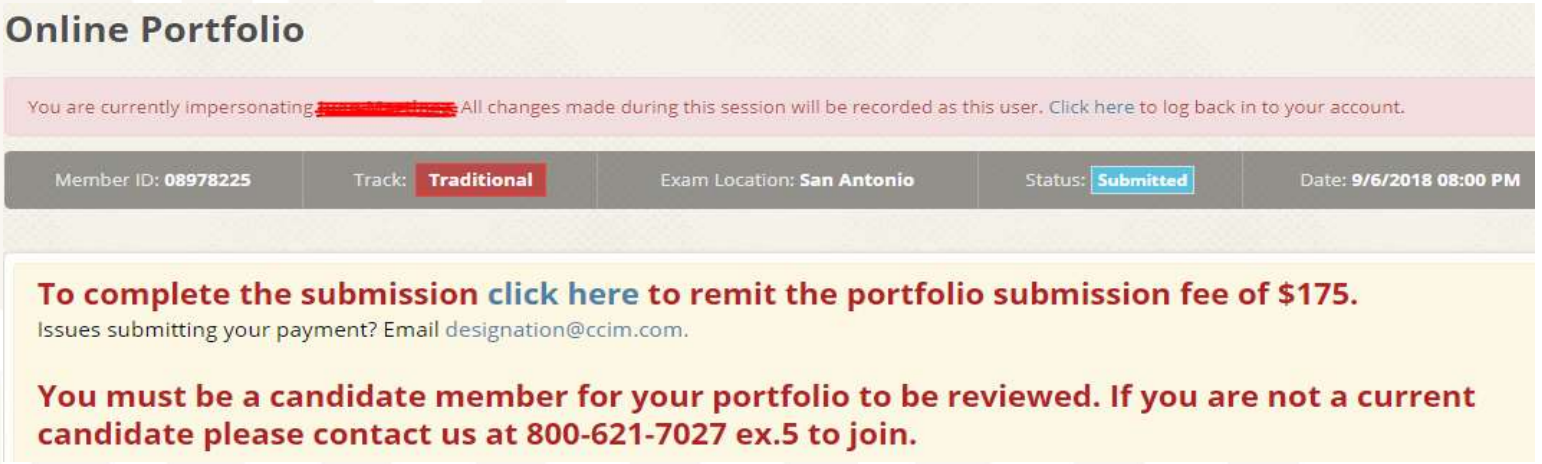
Shows your progress of completion

Navigation tools



Payment

Once you have submitted your portfolio the below screen will appear. Portfolios will not be reviewed without submission fee payment and active membership.



Assembling Traditional Hard Bound Portfolio

Each Hardcopy portfolio submitted should contain the following in this order:

- Portfolio Submission Form
- Portfolio Application
- Professional Resume
- Roles & Responsibilities
- Summary of Qualifying Activities

FOR EACH ACTIVITY:

- Activity Data Form
- Settlement Documentation
- 2 Proofs (at least) of Candidate's Role

The institute will insert the chapter Recommendation letter once it is received.



Mail to:
430 N Michigan Avenue, Suite 800
Chicago, IL 60611

THE CCIM INSTITUTE
Northern Nevada Chapter

ccim.com

Results

- Results will be emailed within one week of the review session. If you do not receive your notice within one week of the review session, check your Junk folder or login to the portfolio portal to see your status.

- Once your portfolio has been reviewed you will receive an email notifying you that your portfolio is either Approved, Disapproved or Incomplete.

Approved- Your portfolio is approved; you have completed this requirement of the designation process

Incomplete- Your portfolio has not yet been approved. You are missing minor items (i.e. signature, date, recommendation). Once you supply the missing item(s) to the Designation department your portfolio will be approved and you will receive an emailed approval notice.

Disapproved- Your portfolio does not meet the required standards. You will have 30 days to provide the requested information directly to your specified reviewer to attempt to overturn the disapproval. You and your reviewer will communicate directly.

The Comprehensive Exam

- The Comprehensive Exam is the last step towards earning the CCIM designation.
- The exam is held twice per year, and as-needed internationally.
- Applicants have the option to attend the Course Concepts Review (2 day immersive, $810) immediately prior to the exam.

Comprehensive Exam-FAQ

- Can the exam be taken online? **No**
- Is the CCR mandatory? **No**
- How long is the CCR? **10:00am-3:00pm (2 days for in-person, 4 days for virtual)**
- How long is the test? **8:00am-2:00pm**
- What is a passing score? **70%**
- Can I retake the exam if I fail? **Yes – 4x**
- Is the Exam open book? **Yes**
- Is there a test fee? **$410**

Comprehensive Exam Schedule

Spring 2025

Portfolio Due Date	January 24, 2025
Exam Registration Deadline	March 28, 2025
Core Concepts Review (CCR)	In-person April 28 - 29
Core Concepts Review (CCR)	Virtual TBD
Comprehensive Exam	April 30, 2025 | Miami | Intercontinental Hotel Miami

Fall 2025

Portfolio Due Date	July 25, 2025
Exam Registration Deadline	September 12, 2025
Core Concepts Review (CCR)	October 6 - 7, 2025
Core Concepts Review (CCR)	Virtual - TBD
Comprehensive Exam	October 8, 2025 | Vancouver | JW Marriott Parq Vancouver

Scholarships and Programs

Take Advantage of Our Programs

Eligible students should consider the following programs.

Prepaid Tuition Package

Candidates for the CCIM Designation can take the Course Concepts Review for free and lock-in current year candidate member tuition rates.

Cultural Diversity Education Discount

Course-specific scholarships are available to qualified applicants.

The CCIM Institute Foundation Diversity Scholarship

Limited scholarships for qualified diversity applicants, funded by the CCIM Foundation.

The CCIM Institute Foundation Named Education Scholarship

Limited scholarships, funded by the CCIM Foundation, are available through local CCIM chapters.

The CCIM Institute Foundation Veterans Scholarships

Limited scholarships for qualified veteran applicants, funded by the CCIM Foundation.

Questions?





THE CCIM INSTITUTE

Advancing the Commercial Real Estate Profession

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