



**Appraisal  
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*Professionals Providing  
Real Estate Solutions*

# Greater Oregon Chapter

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**Two Hour  
Seminar/Chapter  
Meeting and Social  
Thursday, March 20,  
2014**

Dr. Gerard Mildner, Director, Center for Real Estate at Portland State University will be presenting a Seminar titled "Interpreting Real Estate Trends in a Turbulent Market."

## March 2014 Field Notes

### Message from the President:

**Beth Aquilizan, SRA**

[bethomson@earthlink.net](mailto:bethomson@earthlink.net)

My granddaughter recently asked me if I would like to hear her spell her name. Preparing for the task, she took a long, deep inhale before commencing, and with good reason, since her name is J-O-S-E-P-H-I-N-E.

I have taken a deep breath as well, in preparation to follow my capable predecessors in the position of Chapter President. I received a very warm welcome 22 years ago when I came to this Chapter from the Chicago Chapter. I have always been struck by the personal and professional excellence of the GOCAI members and am proud to be "one of you."

The same encouragement and mentorship of which I was lucky enough to have been a recipient will continue to bring new leadership forward. Serving this purpose currently is the Candidate/Mentor program. The program begins its second year with 74 general and 14 residential candidates who are matched with advisor-members whose purpose is to serve as guide and cheerleader through the 4-year (general) and 3-year (residential) paths to designation.

If you are a designated member and are interested in serving as a mentor to up to three candidates, please see the short article elsewhere in this newsletter detailing how to get started.

If candidate mentorship is not your "bag" but you would like to be active within the Chapter, we have a place for you. Public Relations, Governmental Affairs, Finance and Education are all areas in which we have active committees and welcome your collaboration.

The Chapter Leadership's function is to serve its members and I am lucky enough to be assisted this year by an excellent group of people who are giving their time and expertise for that purpose. Brian Brooks, SRA is serving as our Vice President, John Donnerberg, MAI is this year's Treasurer and Timothy Holzhauer, MAI is serving as Secretary. Additionally we have three Directors who help guide our decision-making: Jeff Grose, MAI, Katie Banz, MAI and Dean Cameron, MAI. We thank Dean for beginning to serve a second three-year term as Director. Thanks also go out to Ryan Prusse, MAI, our Past President. Each of these individuals has been hard at work already this year ensuring that the Chapter functions to serve you, the membership.



**2014 AI President,  
Kenneth E. Wilson, Jr., MAI,  
SRA and Beth Aquilizan, SRA**

In this two-hour seminar Dr. Mildner will discuss the State of the US and Global Economy, Single Family Residential Markets, Multi-Family Residential Markets, Commercial Real Estate Markets, Neighborhood Change in the Portland Region, Land Use and Growth Management Issues, and Zoning Change and Development in Portland locations.

Hayden's Lakefront Grill  
8187 SW Tualatin  
Sherwood Rd  
Tualatin, OR

Seminar: 3-5pm  
Chapter Meeting: 5pm  
Hosted social (no-host bar)  
to follow the Chapter  
Meeting.

Two hours have been approved with the AI, and applied for in Oregon and Washington.

To register [click here](#)

We also have talented persons serving on the various committees and I will take the opportunity in subsequent newsletters to highlight those people and their accomplishments.

Finally, each of our Chapter Presidents has made a point at some time in their term to honor Vicki Champ, our Executive Director, for her unmatched contribution to the well-being of our Chapter. She is the "face" of our Chapter as the one person in the organization who comes in contact with each member at one time or another, and I know from experience and the comments of others that the contact is uniformly generous and competent.

Please give me a call or send me an e-mail with any ideas, suggestions, questions or concerns you may have, and best wishes to each of you for a fruitful and rewarding 2014.

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 Forward to a Friend

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## Feature Article

### Working Together: Appraisers and Real Estate Agents

*This month's feature article is a two-part discussion about the at-times complicated working relationship between appraisers and real estate agents, and about how the relationship can be improved in order to make the appraisal process more productive and less frustrating for all involved.*

*The first part of the article is written by GOCAI member Theresa C. Blake, SRA, an appraiser based in Vancouver, Washington. The second part of the article is co-written by Katie Fracasso and Jennifer Raynak, real estate brokers with Keller Williams Realty Professionals who also happen to be identical twins. Together, Theresa, Katie, and Jennifer provide a helpful perspective on the appraiser/real estate agent relationship.*

#### Part 1: An Appraiser's Perspective

By Theresa C. Blake, SRA

Appraisal Network LLC

[theresa@appraisalnetwork.info](mailto:theresa@appraisalnetwork.info)

If you are a residential appraiser accepting work from a lender and/or an AMC, chances are you have to work with a real estate agent. Over the years, the appraiser/agent relationship has been compromised by the "blame game". The appraisal profession was blamed for the savings and loan crisis in the 1980's and again was partially blamed for the burst of the housing bubble in 2008 due to aggressive valuation practices between 2004 and 2007. And, most recently appraisers have come under fire, accused of coming in too low on purchase transaction valuations thereby stifling growth. The result of all this "blame" is newly implemented appraiser independence regulation in order to protect appraisers from industry pressure to "hit" a certain value in our reports. Both appraisers and real estate agents have felt the unintended consequences of all this regulation but there are ways to facilitate a better working relationship within the constraints of these regulations. This article provides two perspectives on how to facilitate a better working relationship; first an appraiser's perspective followed by a real estate agent's perspective. You'll find that both of these perspectives have a common theme: communication.

By now, many appraisers are familiar with USPAP and Dodd Frank language or know where to find these publications. I recommend reading an informative article that was written for a chapter of the National Association of Realtors (NAR) titled Appraiser Independence - Can I Talk to the Appraiser & What Can We Discuss? Vic Knight April 2, 2013 <http://www.wsrar.com/wp-content/uploads/2013/05/Guest-Column-Can-I-talk-to-the-Appraiser-Final-EDIT.pdf>. The article was written for real estate agents and discusses appraisal regulation and what can be discussed with an appraiser; what appraisers can discuss after the report has been sent to the lender/client; and tips for real estate agents to help the appraisal process. Good information!

As an appraiser with over 24 years in this industry, I have experienced several changes along the way and have found ways to adapt. One of these adaptive strategies includes proactive communication with any and all individuals who can provide relevant data regarding my subject, neighborhood and surrounding market area. The best source of information regarding the subject is the real estate agent. I have found that information and data provided by agents can make my job easier. Recently, this became abundantly clear during an appraisal of a 5,000+ SF home that was under contract. The listing agent had the seller meet me at the property to show me around and answer my questions. Who better than the seller to disclose information about the property, right? Well, as I found out later, this owner was less familiar with the property than his co-owner who was out of town. Due to the complex nature of the property, the appraisal due date came and went. My client grew anxious, but there was a piece of information missing and I couldn't finish the report until I could reconcile this discrepancy. My indicated opinion of value was higher than the asking price and contract price. It was a beautiful, remodeled home, so why didn't it sell for more? I turned to the listing agent once again; this time my questions were about showings and feedback, specifically looking for negative reactions. What was causing this home to sell so low? The listing agent discussed some of the negative reactions from the showings but none seemed significant. One last time, I asked "is there anything else that would have affected the price?" Finally, she replied "Well, there was a stigma item that was difficult for buyers to get past: the home has L.P. siding"...BINGO! The siding had been painted regularly and "looked" fine. The increased levels of maintenance of the siding made it difficult for the untrained eye to recognize and no, I didn't have the seller disclosure. So without this information from the real estate agent, appraised value would have been too high.

Obtaining this information up front prevents a lot of the back-end communication with reviewer, lender, management company, agents, etc... and makes my job easier. My goal on every report...once a report leaves my desk: I don't want to see it again! So, you can imagine my surprise when I still hear appraisers make comments like "I'm not allowed to talk to a real estate agent" or "I can't accept comparable market data from a real estate agent" or even "I don't have time to talk to real estate agents".

First and foremost, to all those who say "I don't have time to talk to agents", I say you "don't have time not to talk to agents" because all the back-end work that you'll have to do if you get it wrong is even more time consuming and potentially very frustrating for all involved parties.

Next, to those who say "I'm not allowed to talk to a real estate agent", I say "Yes, you can". There is still so much confusion about whether an appraiser can talk to an agent. Again, I say "Yes, appraisers can talk to real estate agents." There is no language in USPAP, HVCC, or Dodd Frank that prohibits communication between an appraiser and an agent, lender, AMC, etc., but there are parameters. Conversations regarding the salient features, improvements, repairs, transfer history, etc... of the subject as well as information about the neighborhood and market data are permitted. However, conversations about appraiser's conclusion of value are not allowed. USPAP, GSE Guidelines, Dodd Frank and many others address appraiser independence issues and not one states that the appraiser cannot talk to a real estate agent. This confusion has caused unnecessary animosity between appraisers and agents, especially when the appraiser doesn't communicate with the agent and the appraisal fails to reflect a significant attribute or detriment (just like my earlier example) that can impact the value of the home. I'll be honest, there aren't too many real estate agents that get too upset by an appraisal that's too high (although your client won't be pleased) but there are many who are upset by values that are too low as these tend to "kill" their deals. I'm not concerned about whether a deal falls apart, but only about whether or not I produce a credible, informative report that reflects a well-supported current market value. In most cases, when this type of report is presented, purchase transactions will be renegotiated and not "killed".

Information is a powerful tool. It allows participants to make educated and sound decisions about their financial future. This brings me to another facet of the communication process: education. A little bit of education goes a long way. For example, here's a hypothetical situation. An agent provides you a sale (next door to your subject) for a 1,000 SF home that sold for \$150 per SF as a comparable for your subject, a 2,000 SF home that sold at \$100 per SF. When the appraisal comes in low, they are shocked because they provided you with a "perfect" comp next door that sold for significantly more per SF. What happened? When I receive something like this during my initial

visit to the property, I use the opportunity to discuss the appraisal process, methodology, what constitutes a comparable, how price per SF plays into the appraisal process, etc... In many cases, this eliminates the "fallout" when the appraised value is less the sale price. Be proactive in your communication, I guarantee that most real estate agents will appreciate your efforts.

Last, but not least, to those who say "I can't accept comparable sales from an agent", I ask why not...as long as the agent doesn't hand them to you and say, you must use these. These sales are market data that you can choose or choose not to include in your analysis. What if there was a good comparable sale next door that was input into MLS with incorrect GLA, MLS area, or even year built (we've all seen the 2013 built home that was actually a 1980 built home that was remodeled in 2013) and it didn't appear in your search. Again, having this comparable provided just made my job easier.

The intent of this article is to facilitate a better working relationship between appraisers and real estate agents. The benefits to the real estate industry as a whole are significant. Remember, we are all on the same side; a robust, healthy real estate market will benefit us all. So I ask you, do you see why it's so important to work together and communicate with one another. Real estate agents are professionals seeking to provide the best possible service to their client and we can be an asset to this process.



Theresa is mother to 18 year old triplets. She has 24 years' experience as a Certified Residential Appraiser and is currently certified in both the State of Oregon and Washington. Theresa received her SRA Designation from the Appraisal Institute in 2010. In her free time, she enjoys graphic design and photography.

## **Part 2: A Broker's Perspective**

**By Katie Fracasso and Jennifer Raynak**

**Keller Williams Realty Professionals**

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As brokers with over 16 years of experience, we have witnessed the relationship between broker and appraiser change significantly. In the early years of our career, access and the sharing of information was free and easy with inhibited access to one another. Obviously, this served a purpose and had the market downturn not have occurred, it might still be that open and accessible.

In today's market, we have found the layers of access that now exist with appraisal management groups to make the sharing of valuable information far more challenging. While we recognize that there are very good reasons to prevent a broker from influencing an appraiser's opinion, we think it can also prevent valuable, property specific information from an appraiser who could greatly benefit from the firsthand knowledge of the property or neighborhood.

From the perspective of a broker, we welcome the opportunity to speak to an appraiser prior to viewing a pending listing or ideally, to meet them at the house. The value of explaining a feature that may not be stated (remember, as brokers, we only have a limited amount of space to state the benefits of a home in a RMLS comment field!) Also, by the time an appraiser visits the property, the pending sale has undergone most inspections and typically 2-3 weeks of negotiations, all of which renders valuable information that was unknown when the listing first hit the market. We recognize that a lot of appraisers have lockbox access, so the need to meet the listing agent is not necessary and often, inconvenient for a busy appraisers schedule. However, appraisers that just go to a property without any notice or contact are circumventing valuable information that could be critical to a more accurate appraisal. For these reasons, we feel making direct contact between broker and appraiser is critical.

Equally important, as brokers, we need to update our closed sales to share any relevant and appropriate concessions as a result of the sale. As brokers, we need to do all we can to communicate to fellow brokers and

appraisers information that helps us all more accurately know true market value. The same is true for making the time to call appraisers back who are requesting closed sales information. Speaking from the broker's perspective, we often get calls from appraisers asking for past sales information. Given the rate at which our market moves (and also our memories fades, we can say that we often have a hard time remembering if there were concessions, etc... on a past sale. Often, we refer appraisers to our assistants who have the closed files. What would be helpful would be to get a follow up email from an appraiser as it is hard to access this information when we are out showing houses or with clients. In particular, it would be ideal if appraisers could include a picture or send a follow up email, including the listing, if they want a more detailed response for information.

If we want our appraisals to be accurate, we need to do our part to pass on this information for everyone's benefit - brokers, appraisers and our clients. After all, isn't that what our clients expect of us as brokers and appraisers?

We find most appraisers to be extremely professional and sincerely attempting to do the very best they can at their profession. We also find most cooperative and recognize the value of both of our roles in serving our clients which leads to successful calculation of our ever changing market values.



Identical twins, Katie usually works with sellers and Jen with buyers. They truly want what is best for their clients and it shows in their work. They are always ready, willing and able to help!

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## Member Spotlight: Beth Aquilizan, SRA

By Brian Brooks, SRA  
[brian.h.brooks@gmail.com](mailto:brian.h.brooks@gmail.com)

- 1) Is ann a tha 'n cairdeas mar a chumar e.
- 2) Dh'aithnichinn air do sheirc do thabhartas.

Google translate won't help you with the above Scottish Gaelic proverbs because that language is not one of the 75 languages it can translate for you. But Beth Aquilizan, SRA, the Appraisal Institute's 2014 Oregon Chapter President is one of roughly 60,000 people world-wide who can be of service with its meaning because she has been studying Scottish Gaelic for over 10 years. She told me there is a surprisingly active learner community in Portland and Seattle.



Beth and I were in Washington DC in 2013 attending LDAC. A number of times I would walk up to Beth and the 1 or 2 people she was talking to and was struck by the warm and friendly rapport she seemed to easily possess. She was usually graciously saying something complimentary about someone in the Oregon Chapter. A Zen master in the way she uses the energy of others in a beneficial way comes to mind. Her speech at the Oregon Chapter's Officer Installation dinner reminded me of an Oscar winner that praises the other nominees instead of talking about themselves and taking all the credit. Beth also seems to have this friendly easy rapport at chapter events and spends time with many close friends that are appraisers. But, again she credits others, and said it is "testament to how welcoming the people (in the Chapter) here have always been."

Like many appraisers she has had her share of 12/7-day but also enjoys the freedom we can enjoy. Beth has "always been pleased to be able to schedule my hours around my kid's events when they were young, and now I have a 6-year granddaughter that I can run over and pick up from school if need be." And she also is fortunate to work with her son Ian, and his girlfriend, Alder.

On the other hand she currently thinks "the system is broken in residential appraisal for attracting newcomers. Our income has dropped sharply for lending assignments, due to the increased requirements placed on us over the past several years without an increase in fees. While the bar to get into the profession is reasonable in regards to our importance to maintaining public trust, the income for a new appraiser (who is most likely to work for lenders)

is not nearly commensurate with the outlay required to get there. This is part of the reason we aren't attracting anyone into the field."

The two proverbs above are appropriate for Beth, in my opinion. The first is 1) "Friendship is as it's kept" and the second is 2) "I know your gift by you graciousness". She hosts parties inviting many appraiser friends and in the email era she is more apt to ask to meet you for lunch. She is going back to basics with her leadership style by focusing on the AI Governance Structure. Beth is bringing things back to fundamentals and this will help the community and Chapter have a solid foundation for the future.

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## **Installation Banquet Recap**

By Hillary Huefner, MAI

The 2014 Installation Banquet for the Greater Oregon Chapter of the Appraisal Institute was held on Friday, January 17, at the Hotel Monaco in downtown Portland.

Ryan S. Prusse, MAI, 2013 President, conducted the meeting. Terry O. Bernhardt, SRA, was the featured speaker (a summary of Terry's comments are published in this newsletter). Terry also presided over the installation of the 2014 chapter officers, with Beth Aquilizan, SRA, now formally serving as our chapter president, and Brian H. Brooks, SRA serving as vice president. John V. Donnerberg, MAI, chapter treasurer, and Timothy J. Holzhauer, MAI was installed as chapter secretary. *Note: Timothy just accepted a position in Seattle and, as a result, he and his family will be leaving us. Stay tuned for information about filling Timothy's vacated position.*

Members who received their designations during the past year were recognized. Clinton C. Becraft, Brian J. Booth, Richard N. LaMont, Jordan R. Lee, and Colette J. Meyer all received their MAI designations since the last installation banquet.

Two special awards were also presented. Dean J. Cameron, MAI received the Outstanding Service Award, and John V. Donnerberg, MAI received the President's Service Award. Craig E. Zell, MAI was randomly selected to receive the free night's stay at the Hotel Monaco.

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## **Appraisal Institute Initiatives for Professional Advancement**

By Terry Bernhardt JD, SRA

[tbernhardt@gavaluation.com](mailto:tbernhardt@gavaluation.com)

### **PROFESSIONAL OPPORTUNITIES ADVANCING!**

The Appraisal Institute Board of Directors had had a busy year, approving a variety of initiatives for personal and professional growth. Probably the most significant is the "Candidates for Designation" program, which promises to shave many years off the mean time-to-designation program, by integrating locally-accessed, on-line, and hybrid "synchronous" (live instructors on-line, with interactive discussions) education programs and available mentors, who will provide that small, continuing push--with a "go-to" assist--to create and sustain a track towards the MAI and SRA. If you are interested, please contact Emma Abraham, program coordinator, at [eabraham@appraisalinstitute.org](mailto:eabraham@appraisalinstitute.org).

Secondly, we have now approved, and even started awarding, the first professional designations in residential and general appraisal review--the AI-RRS, (Residential Review Specialist) and AI-GRS, (General Review Specialist). Many have been awarded since the January 1, 2014, implementation date--including several who have earned both. Both tracks require a two- or three-day Review Theory and Review Case Studies class, plus submission of five review files for experience credit.

Residential appraisers may meet this obligation by simply selecting several FNMA Form 2000 and 2000A's from their files, preferably with a mix of SFR, condo, multi-family and other property types. General requirements have similar class and experience review requirements. These are readily attainable designations which are relatively inexpensive and offer an opportunity to distinguish yourself from the competition in this rapidly growing segment of appraisal services.

Lastly, the Appraisal Institute is creating a "Certification Registry" of various appraisal credentials, which will fill an "appraisal specialty" gap (not everyone is a lifetime general practitioner). We've had a professional development program in litigation, conservation easements, and condemnation for several years. Additional credentialed specialties will offer an opportunity to focus continuing education hours on a meaningful recognition of specialized skills, both residential and general, which will enhance your opportunities to perform at a professional level, with a better return on your education, training, and experience investments. Details outlining these and other programs are available on-line, at the Appraisal Institute website, <http://www.appraisalinstitute.org>

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## **In Memoriam: Bob Bancroft, MAI, SRA**



The Chapter regrettably lost member Bob Bancroft, MAI, SRA, on August 20, 2013, when he passed away. We mourn his loss.

Dana Bratton, MAI, SRA, shared a few words with us:

"I met Bob Bancroft when he was a teenager and was close to him when he finished college and entered the appraisal profession with energy and a passion for analysis. As young appraisers growing up within the communities of Central Oregon we had many lively conversations about appraisal theory and the intent of USPAP. Bob Bancroft helped me to be better at my work and I'm saddened by his passing."

Our thoughts go out to Bob's family.

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## **ACLB Summary**

### **ACLB Quarterly Public Meeting Notes: January 2014**

By Owen Bartels, MAI, MRICS

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#### **Introduction**

GOCAI's primary interest in this meeting was two-fold. First, we hope to influence the staffing of the ACLB Administrator. Second, we have lingering concerns regarding HB 2801, which concerns the appraisal of residential properties constructed with green features.

#### **GOCAI President's Statement**

Beth Aquilizan, our esteemed chapter president, attended the meeting to offer public comment. She provided some historical context for our concerns relating to the Administrator position, especially that the two Administrators preceding Bob Keith (a former appraiser) had been ineffective in the processing of complaints. Ms. Aquilizan stressed that GOCAI's membership would prefer the Administrator have a working knowledge of the appraisal profession.

#### **Compliance Specialist Position**

There is a need for a new Compliance Specialist. The ACLB has been instructed it must have at least 15 applicants prior to scheduling interviews, and that it should interview at least 10 candidates. Fewer than 10 applications have been submitted. Anyone passionate about the integrity of our profession and brave enough to stand in the path of the slings and arrows it will no doubt draw please step forward! The full posting can be found at: <http://oregonaclb.org/wp-content/uploads/2014/01/CP-2-Craiglist.pdf>

#### **HB 2801 Update**

The Board has issued a response to the House indicating that it is not practical for the ACLB to be a course developer or provider, but pledging it will actively pursue vetting courses and administering courses associated with the valuation of green design and features. The House continues debate on this bill in committee during this year's short legislative session, which is occurring even as this newsletter is being assembled.

#### **Enforcement and Oversight**

The Enforcement and Oversight committee, which screens all Allegations against appraisers before they become Complaints to be investigated by the Compliance Specialist reported on several cases, many of which were

dismissed with warnings to the appraiser. Of note here, though, is that any Complaints are not currently being investigated, as there is nobody to investigate. Before these stack up and become problematic let's send in enough applications to allow the Board to hire a new Compliance officer!

There was a report of one action taken: a fine levied against a California-based AMC. The AMC owner had been found to have committed 87 instances of acting as an AMC in Oregon without an Oregon license. After some lively debate, a 6-2 vote approved a fine of \$1,000 per instance, totaling \$87,000 overall. The negative votes were predicated on an assertion that the overall fine was exorbitant.

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## Newly Designated Members

Since our last newsletter, two of our members have received their MAI designations. Congratulations to Clinton C. Becraft, MAI and Richard N. LaMont, MAI! Both members are spotlighted below.



Clinton C. Becraft, MAI



Richard N. LaMont, MAI

**Clint Becraft, MAI**  
[clint@duncanbrown.com](mailto:clint@duncanbrown.com)

### Where did you grow up?

I grew up in Junction City, Oregon and made the short move south to Eugene many years ago. I really like it here, so I've never tried to leave.

### What is your "appraiser story?"

I actually became an appraiser in purpose. I took some real estate classes after I got out of school and went around to nearly every appraiser in town and tried to get a job. I took a job as office help at a residential fee appraisal office and eventually trained to get my state license. After about six years of residential fee work I decided to try something different and went to work at the Lane County Assessor's office and ended up doing mostly commercial work. I got to know John Brown, MAI and Rick Duncan, MAI, SRA while I was at Assessment and Taxation and asked them for a job. I got my Certified General License shortly after and have been working at Duncan and Brown since 2005.

I like the variety of working on commercial properties. There is always something interesting to work on.

What kind of non-appraisal things do you like to do?

I like to be outdoors on the water on one of our many lakes or rivers either wakeboarding or fishing. I spend a lot of time watching my kids play sports and occasionally do some coaching depending on the season. I like wasting time playing my guitars too.

### Favorite things list:

- a. Favorite food: Meat and potatoes.
- b. Favorite kind of music: Metal.
- c. Favorite sports team: Whatever sports team my kids happen to be playing on are my favorite. I also follow NFL and NBA, but I don't have one particular favorite team in either.
- d. Favorite place to visit: Either a warm sunny beach or out on a lake.

e. Favorite move or book: I really liked the last book I read, which was "The Appraisal of Real Estate - 13th Edition".

**What would be your first choice for a second career?**

I'd be pretty happy if I could make a 2nd career out of any one of my hobbies.

**What advice would you give to someone who is currently working toward designation?**

The Capstone class was my silver bullet and I would recommend it to everyone. Also, the Ted Whitmer class was great prep for the Comp. And lastly, make a calendar plan of all the classes/requirements and create a schedule to get it done.

**Richard LaMont, MAI**

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**Where did you grow up?**

I grew up in Los Angeles with a 5 year stint in New Jersey. My mother loved to travel and by the age of 16, I had seen 48 States, mainly in a camper. I loved the outdoors and with a childhood of camping, I decided to attend Oregon State in Forestry. After college, I started my family and forestry consulting business in Corvallis and have been here for the last 37 years.

**What is your "appraiser story?"**

My early career was as a forest analyst, which involved computers and modeling of large timberland properties. I wrote several programs/software for forecasting timber harvest on large timberland (20,000 to 500,000 acre) properties. That led to cash flow modeling and valuations of timberland at a time when corporate timberlands were being sold to TIMO's (Timber Investment Management Organizations). These TMIO's had a need for appraisals of their properties and that led me to becoming licensed and eventually the MAI. I enjoy the variety of the projects, the professionals I work with and being out on the properties I appraise.

**What kind of non-appraisal things do you like to do?**

I am an avid skier and 10 years ago, I wrote a database program and website to track the conditions in all the ski resorts in the Western US and Canada. Well, my hobby got way out of hand and the website attracts 30,000 to 50,000 visitors a month in the winter, [www.SkiTiger.com](http://www.SkiTiger.com). I became a Board member on SkiOregon and the hobby helps support my skiing habit.

I own a home on the Gulf Coast of Mississippi and my wife and I spend time enjoying that area. We are still waiting for grandkids but our large family keeps us busy.

**Favorite things list:**

- a. Favorite food: BBQ, all kinds.
- b. Favorite kind of music: Rock, new and old.
- c. Favorite sports team: The Beavers, of course.
- d. Favorite place to visit: Italy.
- e. Favorite move or book: Modoc: True Story of the Greatest Elephant That Ever Lived.

**What would be your first choice for a second career?**

I already have several first careers; forester, appraiser, web designer, database programmer, builder, gardener.

**What advice would you give to someone who is currently working toward designation?**

The Capstone class was my silver bullet and I would recommend it to everyone. Also, the Ted Whitmer class was great prep for the Comp. And lastly, make a calendar plan of all the classes/requirements and create a schedule to get it done.

**Not so newly...Newly Designated Members**

We also congratulate Jan Young, MAI, SRA who was the second individual to earn both of the new Review designations bestowed by the Appraisal Institute. Jan earned the AI-GRS (Appraisal Institute - General Review Specialist) and AI-RRS (Appraisal Institute - Residential Review Specialist) designations, the first new designations offered by the Appraisal Institute in more than 20 years.



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## **Winery and Vineyard Appraisal Seminar and Tour: Friday, May 30, 2014 7 hours CE (Pending)**

By John V. Donnerberg, MAI  
[john@donnerberg.com](mailto:john@donnerberg.com)

The GOCAI is proud to present a vineyard and winery appraisal seminar on May 30th, 2014. The morning session will be held at Hayden's Lakefront Grill in Tualatin, OR. The afternoon session will include a tour of several Yamhill County vineyards and wineries, including the Dick Shea vineyard.

The Shea vineyard, not normally open to the public, produces some of the finest grapes in the Willamette Valley for wineries such as Elk Cove, Ken Wright, and Rex Hill, just to name a few. Dick recently began making wine under his own label. Roughly 25% of the Pinot noir fruit produced each year by Shea Vineyard is used by Shea Wine Cellars for its releases. The other 75% of the Pinot noir fruit is sold to some of the finest winemakers in Oregon and California.

### **Presenters:**

Carl N. Stillman, MAI. Carl's Salem-based practice, Stillman & Associates, specializes in winery and vineyard appraisal.

Keith Meyers, CPA. Keith heads Perkins & Co. Beer, Wine & Spirits Practice Groups and specializes in tax consulting and provides business advice to closely-held businesses with an emphasis on succession planning.

Jesse Lyon is an attorney at Davis, Wright, Tremaine. Jess Lyon serves as general counsel to a diverse array of food and beverage companies. Jess leads multi-state distribution contracts for a variety of beer, wine and spirits clients. Within the alcohol industry, his supply chain transactions experience includes vineyard leasing, grape and bulk wine sales and sourcing arrangements, and winemaking and winery hosting agreements. He also helps clients buy and sell vineyards, wineries, breweries, and distillery businesses, and guides clients with corporate work and family business succession planning.

### **Registration:**

Lunch, tasting fee's, and transportation are included as part of the class. The cost is \$200 for chapter members and \$240 for non-members. Please contact Vicki Champ at the GOCAI office, or check online for additional details as they become available.

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## **Announcements, Tips, and Odds and Ends**

## **LDAC 2014**

Two of our members-Owen Bartels, MAI and Kurt Plaster, MAI-will be representing our chapter at LDAC (Leadership Development and Advisory Council) this summer in Washington, D.C.

## **ODOT Qualified Appraisers List**

Chuck Wells, MAI, who is the Chief Appraiser with the ODOT Right of Way Section in Salem, spoke in November about changes in the ODOT contracting process. The process has now been fully vetted and ODOT is now accepting applications from appraisers who wish to be included on the qualified appraisers list. For information on the application process, please review the attached document.

[Vicki, please provide a link for the ODOT RFQ fee appraiser's doc. Thanks.]

## **GOCAl Chapter Directory**

The Chapter is considering publishing another paper-copy directory of our members. While Director Katie Powell Banz, MAI and President, Beth Aquilizan, SRA, continue to explore various options for the directory, please take a moment to make sure your contact information is current on the AI National website, as that will be the source for data published in our local directory. Thank you.

## **Quick Technology Tip**

by Brian Brooks, SRA  
[brian.h.brooks@gmail.com](mailto:brian.h.brooks@gmail.com)

Say you have 60 MLS sheets in a PDF (this works for most but not all PDF documents) and you are trying to find comps that have an ADU, or Sports Court, or whatever. With a PC keypad hit Ctrl+F (or Command+F for a Mac) and a dialogue box will appear on the top of the monitor were you can type in ADU, or any other word or term that you like. The searched-for term-if it exists in the document-will be highlighted. This is the same for Microsoft Word, or Excel, etc. So you won't have to read all 60 MLS sheets to find your ADU. The comps with an ADU will be easy to find.

## **Candidate Advisory Program: Additional Residential Mentors Needed!**

The Candidate/Advisor Program is in full swing and has been more successful than originally anticipated. About 40% of our Chapter's Associate members have chosen to begin progress on the structured and stream-lined path which will lead them to their Designation, with the assistance and support of a designated Advisor.

Any Designated Member is invited to serve as an Advisor. Our Chapter is especially in need of Residential Advisors at this time. After taking a short on-line "Orientation Course" you will be made available to up to 3 Candidates as a source of guidance. Help with appraisal theory or on appraisal assignments is not to be supplied. You and the Candidate are given a "time-line" report which divides the Candidate's remaining requirements into a doable time frame. The Advisor is asked to contact Candidates at least quarterly each year, in addition to being available throughout the year if assistance is requested.

For more information, see the "AI Candidate Advisor Program" on the Appraisal Institute Website:  
<http://www.appraisalinstitute.org/about/about-the-appraisal-institute/ai-candidate-advisor-program/>

## **Help Wanted: Research Support/Commercial Appraiser Trainee**

Research support/commercial appraiser trainee position available with an established Portland-based commercial appraisal firm. Responsibilities include field investigation, planning department interviews, subject property and comparable data development, transaction confirmation, internet research and a broad range of related market analysis. Must have a college degree or experience equivalent as well as excellent interpersonal, computer, writing and telephone interview skills. At least 3 years of real estate related experience is required with preference given to those having an appraisal or commercial brokerage background.

**NO EXCEPTIONS-PLEASE DO NOT RESPOND IF YOU DO NOT MEET THE EXPERIENCE REQUIREMENT.** References and background check required. Compensation negotiable depending upon experience. Only qualified individuals will be considered.

Please forward a detailed resume and work history to Richard Herman MAI, FRICS at [rick@rpherman.com](mailto:rick@rpherman.com).

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## Upcoming Events

<u>DATE</u>	<u>DESCRIPTION</u>
March 14	7 Hour National USPAP Update
March 20	Interpreting Real Estate Trends in a Turbulent Market(2 hour seminar/chapter mtg./social)
May 8	7 Hour National USPAP Update
May 9	Business Practice & Ethics
May 13-16	General Appraiser Site Valuation & Cost Approach
May 30	Winery and Vineyard Appraisal Seminar and Tour

For a complete list of upcoming classes and events, and to register for any of these classes, please visit the GOCAI website, [www.oregonappraisers.org](http://www.oregonappraisers.org)

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Sincerely,

Hillary Peterson, MAI  
Newsletter Editor, Greater OR. Chapter of the Appraisal Institute

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