



2023



INDUSTRY PARTNERS OF IREM ORANGE COUNTY PROGRAM

IREMOC.ORG
(949) 215-5539
INFO@IREMOC.ORG

2023 INDUSTRY PARTNERS OF IREM® OC PROGRAM

Dear Current and Prospective Industry Partners of IREM®,

Prepping for another wonderful year working together! As you read through this year's application for partnership, you will notice that it is similar to the 2022 program with a few key updates. With the recent changes taking place within our industry and beyond, we continue to re-evaluate the ROI offered through our Industry Partner program to include increased value, transparency, and tangible engagement with our members. We feel we have continued to create an opportunity for your marketing dollars to go further in 2023 considering the ever-changing environment of our industry.

A new Industry Partners of IREM program was rolled out in 2021, which removed the cap/limit per category and the first right of refusal for IREM OC events. In 2023, three main changes are being implemented. There will be no cap/limit on the number of Platinum Partners, the Bronze Partnership will be dissolved and events will be exclusive access to IREM OC Industry Partners only. The Southern California Real Estate Conference "SCREC" (excluding the tradeshow) will be the only event that is available to a non-member Industry Partner/Vendor in 2023.

Overall, the Orange County Industry Partners of IREM® program enables participating service providers to expand their business opportunities by providing access to real estate professionals in a variety of programs, publications and events throughout the year. Partners are pre-screened providing references, proof of proper licenses and proof of insurance. Participation is not automatic; applications are submitted and reviewed prior to approval annually.

We look forward to you experiencing the changes and additions to our 2023 Industry Partner program and sincerely thank you for your considered partnership. Your participation makes IREM stronger and gives property managers a chance to expand their professional vendor resources that help them execute their mission of asset value creation and preservation.

Commitment to Professionalism

IREM Orange County is strongly committed to promoting and maintaining strong business relationships between Industry Partners and IREM Members. *Accordingly, solicitation efforts at any Industry Partners or chapter function are strongly discouraged.*

Please contact us if you have any questions at info@iremoc.org or (949) 215-5539 EXT. 117

Thank you and best regards,

Casey Ellis
Chaper President
IREM® Orange County

Marisa Greenway
Executive Director
IREM® Orange County



701 East Chapman Avenue, Orange, CA 92866
(949) 215-5539 | info@iremoc.org

PARTNER BENEFITS

PLATINUM
\$15,000

GOLD
\$7,500

SILVER
\$2,500

MARKETING

- Your company business featured on our new and improved website, www.iremoc.org
- Listing in our quarterly digital news magazine The Source
- Opportunity to submit content for educational articles for review, to be included in The Source magazine
- Sponsorship in the form of logo recognition on all events not exclusively sponsored by our Gold and Platinum Partners, or individually sponsored events
- Community/Charitable partnerships with IREM OC
- Quarterly marketing e-blast to our full database

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DIRECTORY

- Inclusion in annual IREM Orange County E-Directory
- Access to electronic copy of the IREM Orange County membership directory
- Access to online membership directory

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SOCIAL MEDIA

- Highlight of your company across all IREM OC social media platforms one time throughout the year
- Social media marketing on IREM Orange County platforms throughout the year
- “Social Media Takeover” to include 1 dedicated social media post promoting your company throughout the day on 4 platforms—Facebook, Instagram, Twitter, and LinkedIn

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EVENTS

- Ability to attend IREM OC’s 2023 calendar of events

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ECONOMIC FORECAST

- Event Sponsorship
- Tickets to Event

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SOUTHERN CALIFORNIA REAL ESTATE CONFERENCE (SCREC)

- Option to purchase a tradeshow booth
- Event Sponsorship
- Individual tickets to event
- Seats at the President’s Table at SCREC
- Sponsorship of the Keynote Speaker
- Two-minute speaking opportunity or video at event

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INDUSTRY PARTNER RECOGNITION DINNER

- Individual ticket to Industry Partner Recognition Dinner

2	2	2
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EDUCATIONAL SEMINAR LUNCHEON

- Event Sponsorship
- Tickets to Event

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IYP SUMMER MIXER

- Event Sponsorship
- Tickets to Event

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2	○	○

AWARDS & INSTALLATION EVENT

- Title Sponsor
- Tickets to Event
- Two-minute speaking opportunity or video at event

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ADDITIONAL SPONSORSHIP OPPORTUNITIES

In the event of multiple requests to sponsor the same event, Industry Partners will be chosen by random draw at the January council meeting.

****Please note that attendance for those events will be sponsoring IPs only and Platinum Partners****

ECONOMIC FORECAST LUNCHEON \$500

Participate as a table top exhibitor at our Economic Forecast. You will receive a 6' table and the opportunity to exhibit to our real estate professionals. Your logo will also be on all marketing prior to the event. **(Event Closed)**

IYP TRIVIA COMPETITION \$250

This sponsorship will cover the cost of light snacks and beverages for our Real Estate Professionals attending the event. along with attendance for (4) to the event. This is a sponsor only event. **(Event Closed)**

CLAY SHOOTING EVENT (12 teams of 5 available) \$1,250

Sponsors will receive digital and print marketing of their company logo on all event collateral and registration, along with attendance for (5) to the event. This is a sponsor only event. **(April 19, 2023)**

ANNUAL CHILI COOK OFF EVENT (2 sponsorship booths available) \$250

Sponsors will receive digital and print marketing of their company logo on all event collateral and registration; includes 1 ticket to the event and 1 chili competition booth/table entry. **(May 4, 2023)**

DE & I EVENT (4 sponsoships available) \$300

Sponsors will receive digital and print marketing of their company logo on all event collateral and registration, along with an opportunity to present to all students and member attendees to the event in their specialized industry. **(TBD)**

IYP IMPROV HAPPY HOUR NIGHT (SOLD OUT) \$750

Sponsorship includes exclusive access to Real Estate Professional attendees. Sponsors will be the only Industry Partners to attend this event. Attendance for (1) company representative included. **(September)**

SCREC TRADE SHOW BOOTH (17 Exhibitor Booths available) \$1,400

Participate as an exhibitor at our famous annual conference and trade show. You will receive a 10' x 10' exhibitor draped booth, one 6 ft. table, two chairs and the opportunity to exhibit your services to over 400 real estate professionals. You will also receive two (2) complimentary full day passes, five (5) exhibitor passes for the trade show only, and five (5) trade show only passes that you can give to property managers and other non-service providers. Reserve your spot now! Limited booths available. **(July 25, 2023)**

ANNUAL CHARITY GOLF TOURNAMENT - GOLF FOURSOMES (14 Foursomes available) \$1,200

(June 22, 2023)

HOLIDAY EVENT (SOLD OUT) \$500

Sponsors will receive digital and print marketing of their company logo on all event collateral and registration, along with attendance for one (1) to the event. **(December)**

INDUSTRY PARTNERS OF IREM[®] ORANGE COUNTY

RAFFLE/SILENT AUCTION DONATIONS

We will be collecting silent auction and raffle item donations for our Annual Charity Golf Tournament. If you are able to commit to either, please check the boxes below. We will then add you to our emailing list before the event.

If you wish to opt out of donating, please let us know below. This is to ensure that we limit our emails to you in the future regarding raffle and silent auction donations.

- 2023 ANNUAL CHARITY GOLF TOURNAMENT**
Raffle Item (\$50 & Above)
- 2023 ANNUAL CHARITY GOLF TOURNAMENT**
Silent Auction Item (\$200 & Above)
- I will not be able to donate this year, I understand that by marking this box I will not be receiving emails from IREM or committee volunteers to ask for donations for the events listed above.**

INDUSTRY PARTNERS OF IREM[®] ORANGE COUNTY

2023 COMMITTEE VOLUNTEER FORM

A professional association such as ours depends on its members' participation to continue as a viable organization. You can become part of our work by volunteering for one of our committees. Get involved by serving on a committee in 2023.

I am interested in joining the following committee(s):

- | | |
|--|--|
| <input type="checkbox"/> DIVERSITY, EQUALITY & INCLUSION
AND STUDENT OUTREACH | <input type="checkbox"/> CLAY SHOOTING EVENT |
| <input type="checkbox"/> EDUCATION | <input type="checkbox"/> SCREC 2023 |
| <input type="checkbox"/> CHARITY OF 2023 | <input type="checkbox"/> CHILI COOK OFF |
| <input type="checkbox"/> IREM YOUNG PROFESSIONALS (IYP) | <input type="checkbox"/> CHARITY GOLF TOURNAMENT |
| | <input type="checkbox"/> HOLIDAY EVENT |

**PLEASE NOTE THAT ALL REQUESTS ARE SUBJECT TO COMMITTEE SPOT AVAILABILITY*

NAME PHONE

COMPANY

EMAIL

Please return your completed form to: IREM[®] Orange County at info@iremoc.org

INDUSTRY PARTNERS OF IREM[®] ORANGE COUNTY

GENERAL COMPANY INFORMATION

(Main Contact for IREM OC Office Use/Sponsorship Opportunities)

- \$2,500 SILVER PARTNER
- \$7,500 GOLD PARTNER
- \$15,000 PLATINUM PARTNER

ADDITIONAL SPONSORSHIP OPPORTUNITIES

TOTAL AMOUNT

PAYMENT METHOD:

- CHECK ONLINE/STRIPE

COMPANY NAME: _____ YEAR EST: _____

MAIN CONTACT: _____ TITLE: _____

BUSINESS ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

BUSINESS PHONE: _____ BUSINESS FAX: _____

EMAIL ADDRESS: _____

PRIMARY COMPANY CATEGORY: _____

SUGGESTION FOR NEW CATEGORY: _____

CURRENT INSURANCE COVERAGE (Please attach a copy of Coverage with Application)

GENERAL LIABILITY \$2MM WORKMAN'S COMPENSATION

PROFESSIONAL LICENSE / REGISTRATION NUMBERS

LICENSE NUMBER: _____ VALID THRU: _____ / _____

BUSINESS NUMBER: _____ VALID THRU: _____ / _____

CONTRACTOR'S LICENSE (If Applicable): _____ VALID THRU: _____ / _____

OTHER: _____ VALID THRU: _____ / _____

VETERANS & STRATEGIC PARTNERS

- Industry Partner Veteran (IPV) IREM Strategic Partner (SP)

IREM CPM[®] and/or ARM[®] REFERENCES (Only applies for NEW Industry Partners of IREM)

NAME/COMPANY: _____

EMAIL: _____ PHONE NUMBER: _____

NAME/COMPANY: _____

EMAIL: _____ PHONE NUMBER: _____

INDUSTRY PARTNERS OF IREM[®] ORANGE COUNTY

VETERANS & STRATEGIC PARTNERS

IREM Orange County relies on the support and dedication of its Industry Partners to succeed and would like to acknowledge those that have been actively involved over the years. The following titles will be provided to Industry Partners who meet the requirements as stated below:

IPV – Industry Partner Veteran

- Minimum (5) years affiliation with IREM OC as an Industry Partner
- Served in at least (7) committees during that time
- IPVs will receive recognition during IREM OC's Annual Awards & Installation event
- IPVs will receive a specific award highlighting their active involvement
- IPVs will be issued (1) badge for a company representative of their choice including their IPV designation to be worn at IREM OC in-person events
- IPVs will be given rotating shared space on the IREM OC member portal to be marketed as an IPV

ISP – IREM Strategic Partner

- Minimum (12) years affiliation with IREM OC as an Industry Partner
- Served in at least (7) committees during that time
- Have contributed a net spend above \$50,000 within the past (5) years
- ISPs will receive recognition during IREM OC's Annual Awards & Installation event
- ISPs will receive a specific award highlighting their active involvement
- ISPs will be issued (2) badges for company representatives of their choice including their ISP designation to be worn at IREM OC in-person events
- ISPs will be reserved a seat on the Industry Partner Appreciation Dinner committee
- ISPs will be provided a non-voting board seat on the IREM OC board of directors, allowing presence at board meetings and a voice within the organization
- ISPs will be given rotating dedicated space on the IREM OC member portal to be marketed as an ISP

*Industry Partner Veteran and IREM Strategic Partner status will be determined and confirmed by IREM Orange County.

INDUSTRY PARTNERS OF IREM[®] ORANGE COUNTY

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.

I pledge myself to acknowledge the ethical

principles as set forth in the International Ethics Standards established by the International Ethics Standards Coalition of which the Institute is a member.

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 Member 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.

INDUSTRY PARTNERS OF IREM[®] ORANGE COUNTY

CODE OF PROFESSIONAL ETHICS

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, gender identity, 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 boards 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.

Subscribed to by: _____

Date: _____

2023 IREM[®] OC BOARD OF DIRECTORS

Chapter President

Casey Ellis, CPM | RiverRock Real Estate Group, Inc. | cellis@riverrockreg.com

Past President

Mayra Ramirez, CPM | Prologis | mar2140@gmail.com

President Elect

Nicole Bee, CPM | JLL | nicole.bee@jll.com

Vice President of Finance

Brianna McHenry, CPM | RiverRock Real Estate Group, Inc. | bmchenry@riverrockreg.com

Vice President of Membership

Lori Gertsch, CPM | 1st Commercial Realty Group, Inc. | l.gertsch@1st-comm.com

Vice President of Education

Cini Apostol, CPM | Apostol RE LLC | CACini2021@outlook.com

Vice President of Industry Partners

Erin Freeman-Goto, CPM | Link Logistics Real Estate | efreemangoto@linklogistics.com

Vice President of Programs

Sarah Medren, CPM | FPI Management | smedren0707@gmail.com

Vice President of IREM Young Professionals

Jannelle Villaluz | Greenlaw | jannelle@greenlawpartners.com

Vice President of Diversity, Equality & Inclusion

Tiffany Brokke | InvenTrust Property Management | tiffany.brokke@inventrustpm.com

Vice President of Public Relations

Emily Franklin | Athena Property Management | efranklin@athena-pm.com

Director of Programs

Heather Schultz | Link Logistics Real Estate | HSchultz@linklogistics.com

Director of Legislative Affairs

Linda Kight, CPM | Transwestern | linda.kight@transwestern.com

Director of Industry Partners

Megan Hernandez | Link Logistics Real Estate | mhernandez@linklogistics.com

Director of Finance

Basil Newburn | Tidemark Real Estate Services | basil@tidemarkrealestate.com

Director of Membership

Windell Mollenido | The REMM Group | wmollenido@remmgroup.com