



# Arcadia Association of REALTORS®

## Executive Summary & Final Report

### *"Investing in the United States: A Roadmap for Inquiring Minds"*

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**Innovation:** "Investing in the United States: A Roadmap for Inquiring Minds"

**Association:** Arcadia Association of REALTORS®

**Contact Person:** Stephanie Maertens

## 1. PROJECT SUMMARY

### a) Statement of Purpose

The purpose of "Investing in the United States: A Roadmap for Inquiring Minds" is to enhance both member and non-member experience in the commercial investment real estate industry by helping practitioners understand what countries are the top investors in the United States and how to help clients who originate from those countries.

### b) Original Goals

The original goals of the event are:

- To enhance the value of membership for both our members and members of our surrounding Associations who are involved in commercial real estate and/or investment real estate
- To connect individuals of a similar practice and encourage networking among them
- To enhance the expertise of the local real estate agent who is involved with foreign transactions or who may have foreign clients and help them to learn best practice methods for completing an investment transaction.

### c) Objectives

The objectives of the event are to:

- Create an environment conducive to networking and building connections
- Create a fun environment that would attract attendees from a variety of commercial and investment real estate-related entities
- Educate attendees on how to help foreign clients they might have to invest in the United State real estate market
- Provide an educational event that will assist in furthering the business endeavors or members and non-members alike
- Make attendees aware of the Arcadia Association Commercial / Investment Committee's strong commitment to providing quality education offerings for those in commercial and investment real estate and those interested in becoming involved with commercial and investment real estate
- Add a global perspective to an investment real estate event

**d) Success Criteria**

The criteria for success is as follows:

- Strong attendance with good numbers
- Positive feedback on the speakers and the event as a whole

**2. PROJECT FINANCIALS****a) Project Budget Overview**

The budget for the project included funds for the venue, coffee/tea service in the morning, lunch for attendees and the cost for one of our main speakers.

**b) Income**

Our event income was as follows:

- |                              |         |
|------------------------------|---------|
| • Sponsorship                | \$1,200 |
| • Attendee Tickets Purchases | \$1,755 |
| • N.A.R. Innovation Grant    | \$2,500 |

**c) Expenses**

Our event expenses were as follows:

- |   |         |
|---|---------|
| • Main speaker  | \$150   |
| • Venue (includes all food/beverages)                   | \$3,495 |
| • Revenue Share agreement with surrounding Associations | \$20    |
| • Gifts for Panelists                                   | \$150   |

**3. PERFORMANCE MEASURES & BENCHMARKS****a) Outline Tasks, Meetings and Activities Required to Close the Project**

Our Commercial / Investment Committee created a special Task Force at the beginning of the year. This Task Force met on a monthly basis beginning in March. The Task Force was tasked with making all the decisions regarding the event – both major and minor. Those tasks included, but were not limited to decisions on the venue, the date, the time, the event program, the keynote speaker and the food options. Other activities such as the creation of an event program, the coordination of final details and coordination with the sponsors were completed by the staff liaison to the Committee about 1-2 weeks out from the event.

**b) To What Level of Success was Achieved?**

The event was considered to be successful due to the feedback received. Unfortunately, the event did not gain the attendance we had hoped for. We only received half of the total number of registrants we had projected.

**4. PROJECT TIMELINE**

*January* – Develop a specialized Task Force to brainstorm, plan and make all decisions regarding the event. Submit Innovation Grant Application to N.A.R.

*March* – Learn if grant is received and continue brainstorming and moving forward based on monetary resources available. During this time, the Task Force had decided which venue they would prefer to use.

*April* – Do a site visit to the venue to seek out an appropriate area for our event.

*May* – Book the venue. Inquire with surrounding Associations and entities regarding the possibility of partnership. Begin seeking out event sponsorship by Affiliate members and other Commercial real estate vendors.

*June* – Begin serious discussion about preferred speakers for the event. Task Force and Staff Liaison look into all options and costs involved with various speakers.

*July* – Finalize speaker lineup. Finalize a marketing flyer and begin advertising. Work with entities in which a partnership exists to ensure they are marketing the event adequately.

*August* – Send out emails to entire Association membership and also to Commercial Practitioner Contact Database in-house to announce the event.

*September* – Begin sending out weekly emails to entire Association membership and also to Commercial Practitioner Contact Database in-house to encourage registration. Pitch the event at weekly membership meetings.

*October* – Conduct final push for registrations. Finalize last minute details with venue and sponsors. Execute event.

## **5. PROJECT MANAGEMENT**

### **a) Marketing Strategy**

Our marketing strategy was a simple one: to reach as many Commercial, Investment, International and Residential real estate practitioners as possible. In order to achieve this, we used several different methods of delivery. Initially, we created a marketing flyer. We then distributed the flyer via our weekly membership meeting and made copies readily available at our Association for any and all meetings that we had. We also emailed this flyer to our entire membership with a brief synopsis of what the event included. Finally, we partnered with local Associations and real estate entities to help market the event to their members as well. As an additional effort to spread the word regarding the event, our entire Commercial / Investment Committee divided all of our large local real estate offices amongst themselves and personally visited each office to promote the event.

### **b) Planning Meetings**

Our Commercial / Investment Committee has regular monthly meetings. This project was an active topic at each meeting for the ten months it was being planned. In addition, a special Task Force was created of Committee members to meet monthly throughout the process to discuss details and decisions. If any discussions needed to be had in between meetings, group emails and/or conference calls were organized.

### **c) Day-to-Day Project Management**

On a day-to-day basis, our Committee Staff Liaison monitored the progression of securing speakers and sponsors. Also, the Liaison actively promoted the event and received

registrations, all while answering any questions that potential attendees and sponsors might have. Once the event details were entirely finalized, the day-to-day management was minimal until the event drew close. The entire week prior to the event was extremely labor intensive for the Staff Liaison regarding this event due to last minute registrations and last minutes details. On the day of the event, the Staff Liaison was present for portions of the day to ensure that all went smoothly. In addition, a Commercial Committee member was appointed as a Point of Contact in case additional questions arose or issues occurred.

## **6. LESSONS LEARNED / OUTCOMES**

### **a) Who Benefitted From Your Project?**

Arcadia Association of REALTORS® members and members of surrounding REALTOR® Associations will benefit from this project. As local leaders in the Commercial real estate education arena, our Committee makes it a point to keep all education opportunities open to any REALTOR® or real estate related vendor or Affiliate, rather than make them exclusive to our members only. Our goal is to not only assist our own members to grow in their knowledge, but also all members of surrounding Associations.

### **b) Project Highlights**

Highlights of the event include:

- An extremely knowledgeable group of four expert panelists to offer their expertise regarding the process of an international investment transaction including financial and legal aspects
- A keynote speaker to culminate all points of the event and discuss "Investment in the United States"
- A fun environment for networking and socializing
- Two afternoon practitioner speakers who work heavily overseas and their ability to bring a completely different perspective regarding working closely with those of other cultures

### **c) Project Best Practices**

Best practices include:

- Having an extremely organized Staff Liaison to help coordinate all details and facilitate the event on the day-of.
- Researching your speakers to ensure that they come highly recommended and will work well with the audience of the event.
- Having structured monthly meetings to ensure all volunteers are staying committed to their responsibilities and that all details are covered.
- Ensuring that your Task Force includes only 3-4 people maximum so that ideas for the event will be as focused as possible.
- Utilizing Association Affiliate members to help sponsor the event.

- Ensuring that Committee members are available and on-hand for the event on the day-of to assist with coordinating all elements.

**d) What Processes Worked Well**

- Having a staff liaison as a centralized point-person to coordinate the event and ensure all details were covered
- Having a specialized Task Force to plan the event, rather than a Committee as a whole
- The process used of accepting registrations (Constant Contact and our in-house system)
- The monthly Task Force check-in meetings to assist with making all decisions regarding the event

**e) What Could Have Been Improved, and How?**

One important thing that could have been improved upon was the topic itself. Our Commercial Committee and Event Task Force believed the topic of "Investing in the United States" would truly be of interest to Commercial practitioners, as investment is an extension of what many of them do regularly. However, it would seem, as evidenced by our attendance numbers, that the topic was not of high interest to our typical audience. We believe that this resulted in our numbers being half of what we anticipated. In the future, we must give extensive thought to who our targeted audience is as a whole and keep the topic aligned accordingly.

**f) Advice/Comments for Implementing in Another Association**

Overall, this event was successful and we would recommend other Associations trying something similar. The main thing to ensure is that you have a large enough targeted audience who will show interest in an educational day on domestic investment by foreign clients. You also want to ensure your Staff Liaison or Point-Person is a very detail-oriented and organized person. It is very important so that all details are covered and nothing is missed. Also, it would be a great idea to assign a Task Force to make decisions. The Task Force needs to be fully aware of their monthly commitment and be willing to brainstorm and share ideas. They are there for more than just decision-making; they would need to help develop ideas also.



The Arcadia Association of REALTORS® Commercial and Global Committees present

# Investing in the United States: A Roadmap

## FOR INQUIRING MINDS

**INCLUDED IN PRICING:**  
Parking,  
Lunch,  
Poolside Networking  
Reception with  
Appetizers

**Friday, October 2, 2015**

**9:00 a.m. to 3:00 p.m.**

*Networking Reception from 3:00 p.m. to 5:00 p.m.*

*DoubleTree Hotel  
924 West Huntington Drive  
Monrovia, CA 91016*

**EARLY BIRD PRICING**

*(on or before September 18, 2015)*

**\$49**

**REGULAR PRICING**

*(on or after September 19, 2015)*

**\$69**

Are you interested in learning about the process involved with investing in the United States? Do you have foreign clients? Do you *want* foreign clients? If you get foreign clients, do you know how to help them find an investment property and seal the deal? Do you have questions about the process involved with foreigners investing? Join us for this exciting day full of industry professionals and representatives from the top countries with foreigners investing in the United States (Mexico and China).

**SEE BACK OF FLYER FOR DETAILED LIST OF SPEAKERS AND TOPICS**

*To register for this event, please visit [www.TheAAR.com](http://www.TheAAR.com) and click on the event title under "Upcoming Events"*



# Agenda of Speakers / Topics

## *"A to Z Roadmap on the Lending, Financing, and Legalities Involved"*

**9:00 A.M. TO 11:30 A.M.**



**Anita Rodal**  
*International Liaison*  
Associated Foreign  
Exchange; SBPI  
Services, Inc.



**John Chou, MBA**  
*Financial Advisor*  
Waddell & Reed  
Financial Advisors



**Stacy So**  
*Business Relationship  
Manager - Los Angeles  
South Region*  
EastWest Bank



**Jonathan Lin**  
*Hsu Lane & Lin LLP*  
*President*  
Chinese American  
CPA Association

### *LUNCH (Included)*

**11:30 A.M. TO 12:30 P.M.**

## *"Investing in the United States"*

**12:30 P.M. TO 1:30 P.M.**



**Ching K. Chiao, Esq.**  
*Attorney at Law*  
Chiao & Wu, LLP.

## *"Etiquette Practices and What to Expect When Working with Those of Other Cultures"*

**1:30 P.M. TO 3:00 P.M.**



**Paul Salo**  
ChinaCashBuyers.com



**Stephen Yeager**  
*CEO*  
Century 21 Mexico

### *POOLSIDE NETWORKING RECEPTION WITH APPETIZERS (Included)*

**3:00 P.M. TO 5:00 P.M.**

### EVENT SPONSORS



# ***Investing in the United States: A Roadmap***

FOR

## **INQUIRING MINDS**

### **SPONSORSHIP**

**Friday, October 2, 2015**

**Program - 9:00 a.m. to 11:30 a.m.**

**Lunch - 11:30 a.m. to 12:30 p.m.**

**Program - 12:30 p.m. to 3:00 p.m.**

*DoubleTree Hotel  
924 West Huntington Drive  
Monrovia, California 91016*

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#### **PLATINUM SPONSORSHIP LEVEL \$600**

- Full 8-foot long table
- Announced as a Platinum sponsor and given a 5 minute spotlight during the event
- 2 complimentary tickets to the event (lunch included)
- Logo and recognition on fliers, event-related emails, AAR REALTOR® Magazine publication, event program and event Powerpoint slideshow
- 3-month banner ad on AAR website
- 4-weeks banner ad in AAR e-Newsletter

*\*Please provide a raffle prize for the day of the event (suggested value: \$25)*

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#### **DIAMOND SPONSORSHIP LEVEL \$300**

- Half of 8-foot long table (will be shared with one other Diamond sponsor)
- Announced as a Diamond sponsor and given a 2 minute spotlight during the event
- 1 complimentary ticket to the event (lunch included)
- Logo and recognition on fliers, event-related emails, AAR REALTOR® Magazine publication, event program and event Powerpoint slideshow
- 2-weeks banner ad in AAR e-Newsletter

*\*Please provide a raffle prize for the day of the event (suggested value: \$25)*

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#### **GOLD SPONSORSHIP LEVEL \$150**

- Logo and recognition on fliers, event-related emails, AAR REALTOR® Magazine publication, event program and event Powerpoint slideshow
- Business card size advertisement in the full color event program

*\*This sponsorship level does not include a physical presence at the event*

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For questions about sponsorships or to secure a sponsorship, please contact Stephanie Maertens:  
Phone: 626.684.0082 / Email: Stephanie@TheAAR.com

# Gold Sponsors

**ASSET PRESERVATION**  
INCORPORATED



**Dino Chastanine**  
Division Manager

2790 Skyport Drive Suite 200  
San Jose, CA 95031  
Tel: (408) 803-5071  
Cell: (408) 508-5262  
Fax: (408) 644-0182  
Dino@assetpres.com

National Headquarters  
(800) 242-5131  
www.assetpres.com

REC-14311 "Qualified Intermediary"

**Mary Kay**  
Marketing Director

marykay@agpc.com  
www.AGPC.com  
818.247.7771 Office  
818.434.9645 iPhone

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Facebook: [agpc.com](#)  
YouTube: [agpc.com](#)



*The Arcadia, Citrus Valley and Pasadena-Foothill Associations of REALTORS® sincerely thank you for joining us for our event.*

The Arcadia, Citrus Valley and Pasadena-Foothill Associations of REALTORS® are proud to present:

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INQUIRING MINDS



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 Complimentary Networking Session - 3:00 p.m. to 5:00 p.m.

*DoubleTree Hotel  
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 Monrovia, CA 91016*



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**Anita Rodal**  
*International Liaison*

Associated Foreign Exchange: SBPI Services, Inc.



**Stacy So**  
*Business Relationship Manager - Los Angeles South Region*

EastWest Bank



**John Chou, MBA**  
*Financial Advisor*

Waddell & Reed Financial Advisors



**Jonathan Lin**  
*Tseng, Hsu, Lan & Lin, LLP President*

Chinese American CPA Association

11:30 a.m. to 12:30 p.m.

**LUNCH (Included)**

12:30 p.m. to 1:30 p.m.

**"Investing in the United States"**



**Ching K. Chiao, Esq.**  
*Attorney at Law*  
Chiao & Wu, LLP

1:30 p.m. to 3:00 p.m.

**"Etiquette Practices and What to Expect When Working with Those of Other Cultures"**



**Paul Salo**  
*ChinaCashBuyers.com*

ChinaCashBuyers.com



**Stephen Yeager**  
*CEO, Century 21 Mexico*

Complimentary Poolside Networking Reception with Appetizers

3:00 p.m. to 3:00 p.m.

Restrooms: Turn left out of the classroom and continue to the hallway at the end.

# Platinum Sponsor



**LOTUS**  
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**Elia Fuentes**

Certified Senior Escrow Officer / Manager / CEO

Phone: (626) 262-4333 ext.3

Text: (626) 415-4426

Fax: (626) 415-4429

Elia@LotusEscrow.com

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*Natural Hazard Disclosures*

**Rob Noble**

Sales Manager - Commercial Services Division

Phone: (951) 532-6824

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