

EDF Approved Courses & Instructors

The S.E.C. Education Foundation is dedicated to professional education in creative real estate philosophy and methodology. Course Offerings and Instructors approved by the Society of Exchange Counselors and its Foundation are listed below.

If you are interested in having any of these courses presented in your geographic area, please contact the instructor directly regarding program availability and parameters. Questions regarding the S.E.C. Education Foundation or its participation in promoting, sponsoring, or underwriting an approved program should be directed to the Foundation at: info@secedfoundation.com.

Please Note: (CC) indicates a Core Course

Equity Marketing/Exchanging

1. Methods of Effective Marketing – 8 hours (CC)

Jim Brondino, S.E.C., CCIM, Ontario, CA
909-721-6940; brondinoseminars@aol.com

Course Description: All facets to profitable marketing, gaining respect, the presentation process, strategies, packaging, presenting the opportunity, pre-moderating, and the transaction proposal are covered in this course offering.

2. Creative Equity, Marketing & Exchanging – 8 hours (CC)

Bob Giniecki, S.E.C., CCIM, Albany, NY – 518-782-9217 – foresiteprop@att.net
James T. Wilson, S.E.C., CCIM, Winter Park, FL – 866-938-5522 – jtwilson@earthlink.net

Course Description: The objective of this course is to provide an overview of the alternative methods of acquisition and disposition of commercial/investment real estate utilizing creative marketing and the exchange method. In addition, through the various concepts of creative equity marketing, one may have the opportunity to expand a client's ability to close transactions and achieve the desired client benefits. A comprehensive review of the preparation of an effective property presentation, and the review of the regional and national marketing concepts will be presented, thereby assisting the attendee to develop a complete and expanded marketing program for the client. The course workshops will address the technical requirements pertaining to the creative structuring and review of transaction documentation; along with workshop applications for balancing equities; reconciliation and tax impact; and contract preparation. A review of the applicable IRS 1031 Code and application of successful real estate tax strategy is covered; and, how the application of the tax law and the tax deferred exchange process impacts a client. The use of exchanging as an estate building technique will be reviewed; as well as a review of 25 additional reasons (in addition to taxation) that the exchange process may benefit a client.

3. Beyond 1031, Market Driven Exchanging. Solving Problems & Creating Wealth. – 8 hours (CC)

Chet Allen, SEC, CCIM, EMS
760-634-1031 chetallen@roadrunner.com

Course Description. The fundamentals of real estate exchange marketing. The course includes: Client motivations, the creative real estate marketplace, marketing fundamentals, the steps in exchanging, finding exchange opportunities, counseling, brainstorming solutions, marketing problem properties, structuring 2, 3 and 4 way exchanges and handling exchange problems.

4. Beyond 1031- Market Driven Exchanging. Solving Problems & Creating Wealth – 16 hours (CC)

Chet Allen, SEC, CCIM, EMS

760-634-1031 chetallen@roadrunner.com

Course Description. Day 1. The fundamentals of real estate exchange marketing. The course includes: Client motivations, the creative real estate marketplace, marketing fundamentals, the steps in exchanging, finding exchange opportunities, counseling, brainstorming solutions, marketing problem properties, structuring 2, 3 and 4 way exchanges and handling exchange problems.

Day 2. Solutions workshop including case study of five award winning exchanges and brainstorming student's exchange listings and client's problems.

5. Tax Saving Exit Strategies for Retiring Real Estate Owners – 8 hours CE approved in MO & KS

Dennis Crull, CSPG, CCIM, S.E.C., ALC, CRB Orval Fisher, CFP

(816) 246-1900; dennis.crull@timberlineinvest.com

Course Description. Many Americans have accumulated assets over the years in the form of real estate and small businesses, and now want to convert these assets into passive income for retirement. However, the tax implications of outright sales and the burden of future estate taxes on their heirs, leaves them wondering if there is a better way. Retirement planning options exist under the Internal Revenue Code that can provide ways to convert appreciated assets into passive cash flow, eliminate or significantly reduce capital gains and estate taxes, create income tax deductions to offset current and future income, provide tax free inheritances for heirs, and leave a legacy for future generations. This course uses a case study approach to focus on creative ways to utilize current IRS Regulations to maximize after tax retirement income, eliminate the worry of outliving available resources, and care for those left behind.

7. Effective Marketing and Transaction Making – 7 hours (CC)

James T. Wilson, S.E.C., Orlando, FL – 407-496-9879 – jtwilson@earthlink.net

Peter R. West, S.E.C., Adams MA – 413-448-2502 - pwest@ccim.net

Theodore J. Blank, S.E.C., CCIM, EMS, Englewood, CO – 303-393-0993 – Tblank@Fafg.biz

Ronald J. Bowden, S.E.C., CCIM, Shelbyville, IN – 317-398-8533 – rjbowden@evergreeninvest.com

Joseph Crowley, S.E.C., Reno, NV – 775-393-9874 – jcurnameit@gmail.com

Wesley Dinger, S.E.C., Tyler, TX – 903-581-8544 – wdingler@masterrealty.net

Donald Dobroski, S.E.C., EMS, Pittsford, NY – 585-248-2227 – ddobroski@ecpnewyork.com

Ernie Eden, S.E.C., EMS, Atlanta, GA – 404-876-1640 – ernie@bullrealty.com

Darryl McCullough, S.E.C., Bracebridge, Ont. CN – 705-641-8052 – Darryl.mccullough@sympatico.ca

Nick Nichols, S.E.C., Marietta, GA – 770-579-0810 – nnichols@mindspring.com

William F. Richert, S.E.C., CCIM, EMS, Tulsa, OK – 918-743-6262 – brichert@sbcglobal.net

Brandon Sanders, S.E.C., San Angelo, TX – 325-653-1489 – Brandon@steveeustisrealestate.com

William E. Stonaker, S.E.C., CCIM, Southlake, TX – 817-329-2929 – WES@wilson-stonaker.com

Charles E. Sutherland, S.E.C., Dallas, TX – 214-696-9214 – charlesesutherland@gmail.com

Gary Vandenberg, S.E.C., ALC, CCIM, CIPS, Grand Rapids, MI – 616-774-1031 – gary@1031inc.com

Kenneth M. Vidar, S.E.C., Manhattan, MI – 406-539-3358 – ken@vidarcompanies.com

Lance C. Warner, S.E.C., EMS, Sandusky, OH – 419-626-4858 – lwaresrp@aol.com

Course Description. The course explains the underlying principles that function in the marketing session setting and then provides very specific actions and skills to maximize production from attending a marketing session. Included is preparation for presentation and techniques/skills to get the maximum response from a marketing session presentation, whether a formal or quick presentation. The material also includes specific understanding and skills involved in the presenter receiving guidance from the moderator and specific understanding and skills for the moderator to operate as a guide and catalyst to maximize response to a presentation in a marketing session.

II. Counseling

1. Counseling for Action - 16 hours (CC)

Jim Brondino, S.E.C., CCIM, Ontario, CA
909-721-6940; brondinoseminars@aol.com

Course Description: Identify how a client understands situations, the role of the counselor, objectives of counseling, why counsel, effective use of time, benefits, listening, environment, words and images.

2. High Touch Real Estate Brokerage - 8 hours (CC)

Ted Blank, S.E.C., CCIM, Denver, CO
303-393-0993; blank1031@aol.com

Course Description: This course examines the reasons to clearly understand a client's motivation when they are buying, selling, or exchanging. Using the skill of client counseling will allow any agent (residential, commercial, farm, etc.) to help their client reach a successful conclusion.

3. Effective Counseling and Representation of Clients - 8 hours (CC)

Bob Giniecki, S.E.C., CCIM, Albany, NY
518-782-9217; foresiteprop@att.net

Course Description: The purpose of this course is to provide the real estate practitioner with an understanding of the concepts of brokerage as it relates to client profiling, counseling, agency representation, and securing property data for analysis. The course will demonstrate how the implementation of the client counseling process will assist the client in understanding and achieving the desired objective in the transaction process. Methods such as how to conduct effective client interviews, to assist the client in determining the nature of the present real estate situation, and to ultimately define the desired solution will be presented. A study of the various forms of property ownership will be analyzed as they may relate to, and impact a client in the decision making process. The presentation of the various agency relationships will be explored along with a review of the various forms that may be utilized, along with the illustrations of letters of engagements, model authorization agreements, and agency contract provisions.

4. Counseling for the Serious Exchangor - 8 hours (CC)

Ted Blank, S.E.C., CCIM, Denver, CO
303-393-0993; blank1031@aol.com

Course Description: This course is a workshop, not a "how to" course. The objective is to upgrade existing counseling skills, accurately assess our strengths and weaknesses in the continuum of the counseling process.

III. Creative Real Estate Formulas

1. Creative Real Estate Solutions – 7 hours (CC)

Ken Vidar, S.E.C., CCIM, CRS, Manhattan, MT
406-284-3400; kensvidar@grrmontana.com

Course Description: The course will teach you the formulas needed to function in the creative real estate marketplace. It is a "how to" course using actual transactions to show how to use these formulas to build

your or your client's estate. Guaranteed to show you how to find more transactions in the market and to structure them for greater profit.

2. Broker Estate Building -16 hours

Phil Corso, S.E.C., Scottsdale, AZ
480-990-0200; pcorso@pci-az.com

Course Description: Originally created and taught by Cliff Weaver, S.E.C. and Colby Sandlian, S.E.C., the course has been rewritten for the 2000's. The primary focus remains centered upon using real estate as an estate-building tool for the broker and investor, creating long-term cash flow and maximizing profits. Real Estate disciplines covered include utilizing options, creating banking relationships, capital formation strategies, acquisition formulas, development, client counseling and exchanging as a transaction tool.

3. Creative Real Estate Formulas -4-8 hours – CE approved in CO and TX (CC for 8 Hours)

Chuck Sutherland, S.E.C.; Dallas, TX
214-696-9214; charlesesutherland@gmail.com

Course Description: This course provides a wide range of creative formulas to facilitate transactions in the face of adverse market conditions. Creative transaction structures, financing, development, alternative uses, syndications, subdivision, and negotiation, are covered.

4. Investment Property Analysis and Creative Transaction Formulas – 8 hours (CC)

Bob Giniecki, S.E.C., CCIM, Albany, NY
518-782-9217

Course Description: The study of financial analysis and creative financial formulas will provide the real estate practitioner with the variable alternative transaction considerations in addition to improving property marketability. Alternative methods of setting realistic real estate values will be presented. It will also cover potential solutions to working with overpriced and/or over financed properties. In addition to determining the rates of return on investment property, creative formulas will be studied, such as solving negative cash flow situations; wealth building formulas to maximize the return on investment; unique financing considerations; the buying and selling of mortgages; and the use of acquisition to control a property. Detailed examples and workshops for the program are included in the course.

1V. Moderator Training Course

Certified Moderator Course – (2 days & 1 evening) (CC)

Jim Brondino, S.E.C., CCIM, Ontario, California
909-721-6940
brondinoseminars@aol.com

Course Description: Among the topics addressed in the course are (1) characteristics and philosophy of a well run marketing meeting; (2) specifically addresses the elements of an effective moderator; (3) the role and responsibilities of a moderator; (4) the questioning process for effective marketing; (5) the moderator's responsibilities; (6) the presentation process and format; (7) how to create a positive and productive market environment; (8) how to handle a presenter; (9) how to stimulate productive thinking and create participation. Many role-plays are an integral part of the course, as is videotaping and critiquing.

V. Marketing the S.E.C. Way

1. Methods of Moderating & Marketing - 2 Day Course

Jim Brondino, S.E.C., CCIM, Ontario, CA
909-721-6940; brondinoseminars@aol.com

Course Description: The key to successful marketing meetings is quality Moderators. This course covers: Definition of marketplace, presenter and moderator, gaining respect in the marketplace, proven presentation process and format and Marketing session strategies and coping with disruptive influences.

2. How to Market a Difficult Investment Listing in any Economy! - 8 hours or 16 hours – CE approved in TX

Steve England, S.E.C., AFM, ALC, EMS, Kearney, NE
308-236-8505; sengland@ipexneb.com

Ted Blank, S.E.C., CCIM, Denver, CO
303-393-0993; blank1031@aol.com

Course Description: This in-depth class will formulate new ideas and solutions for your client that could result in a successful transaction. Learn how to identify the real problem which could be the property, the client or even the broker. Learn how to evaluate a Property's benefits that create value and opportunity. Learn how to evaluate different categories of property and how they typically rank in the eyes of the market. Learn how to better understand clients and their true needs and motivations. Learn creative ideas and transaction formulas to find a solution that will work. Analyze case studies to illustrate possible transactions.

3. Tough Questions in Tough Times = Closed Transactions – 4 hours – CE approved in CA

Theodore J. Blank, S.E.C., CCIM, EMS, Englewood, CO
303-393-0993; Tblank@Fafg.biz

Course Description: In tough economic times or with hard to market properties, understanding the client is as important, or more important, than understanding the real estate. This course will explore the importance of learning the client's motivations, abilities and inabilities, which will help to design a transaction that benefits the client.

VI. Creative Real Estate Finance

1. The Ground Lease as an Investment and Financing Tool - 4 hours

Phil Corso, S.E.C., Scottsdale, AZ
480-990-0200; pcorso@pci-az.com

Course Description: An advanced course covering the fundamentals of structuring, negotiating and implementing a ground lease in a real estate transaction. Focus is on using the ground lease as a financing and investment vehicle from both the Lessor and Lessee perspective. Issues such as subordination, lender requirements, lease provisions, utilization strategies, investment issues, etc., are covered in depth.

VII. Real Estate Development

1. Hidden Partners - 8 hours

Phil Corso, S.E.C., Scottsdale, AZ
480-990-0200; pcorso@pci-az.com

Course Description: This course is designed for the broker seeking to assist development clients and the developer seeking to add to his knowledge base.

The course focus' on the real estate development process including site acquisition, land planning, governmental and entitlement strategies, zoning and land use considerations, project team building, budgeting, project visioning, market evaluation, capital formation and financing, construction planning and permitting through final certificate of occupancy.

2. Developing & Syndicating: Big Money Real Estate - 16 hours

Chet Allen, S.E.C., CCIM, EMS; Encinitas, CA
760-634-1031; chetallen@earthlink.net

Course Description: The goal is to provide the tools to achieve the huge financial rewards available to the successful real estate developer. The course explores old, and newly conceived, syndication structures used to raise equity capital. This course is designed to encourage the aspiring entrepreneur, and to provide new tools for the experienced developer.