

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: info@secedfoundation.com. Please Note: (CC) indicates a Core Course.

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

Chet Allen, SEC, CCIM, EMS
760-634-1031 - chet1031@gmail.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

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

Chet Allen, SEC, CCIM, EMS
760-634-1031 - chet1031@gmail.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.

4. 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
(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 resources, and care for those left behind.

5. Creating Powerful Transactions that Close – 7 hours (CC)

James T. Wilson, S.E.C., Orland, FL – 407-496-9879 – jtWilson@earthlink.net – Author & Instructor

Authorized Instructors

Peter R. West, S.E.C., Adams MA – 413-448-2502 - pwest@ccim.net
Theodore J. Blank, S.E.C., CCIM, EMS, Denver, CO – 303-748-9998 blank1031@gmail.com
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 – wdinger@masterrealty.net
Ernie Eden, S.E.C., CCIM, Atlanta, GA – 404-666-7002 – ernie@edencr.com
Darryl McCullough, S.E.C., Bracebridge, Ont. CN – 705-641-8052 – darrylj.mccullough@gmail.com
Nick Nichols, S.E.C., Marietta, GA – 678-612-5362 – 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
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.

6. The Seven Deadly Sins of Marketing – 2 to 4 Hours

Ted Blank, S.E.C., CCIM, Denver, CO
303-748-9998; blank1031@gmail.com

Course Description: This is an advanced course structured for those who are already in the Exchange/Equity marketplace. Having attended 1,500 Local, State, and National real estate marketing meetings over 30 years, I see brokers continually making the same mistakes/sins year after year. In this 2-4 hour course we will examine 7 of the most common challenges to successful Equity Marketing that are found in the Brokers, the Clients, the Properties, and the Marketplace. Actual examples will be used to demonstrate how we can modify our techniques to increase our productivity in the future.

II Counseling

1. Jim Brondino's Counseling for Action - 16 hours (CC)

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

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

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. Understanding Your Client - 8 hours (CC)

Ted Blank, S.E.C., CCIM, Denver, CO
303-748-9998; blank1031@gmail.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. Counseling for the Serious Exchangor - 8 hours (CC)

Ted Blank, S.E.C., CCIM, Denver, CO
303-748-9998; blank1031@gmail.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 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.

2. Advanced 1031 Exchange Issues & Prospective Problem Solving (3-4 hours)

William L. Exeter, President & CEO of Exeter 1031 Exchange Services, LLC
619 - 239-3091 - wexeter@exeterco.com

Course Description: This Advanced 1031 Exchange Seminar will discuss advanced structures, strategies, and planning issues for your 1031 Exchange transactions, including: combining a Reverse and an Improvement 1031 Exchange; combining a Reverse 1031 Exchange into a Forward 1031 Exchange; combining a Forward 1031 Exchange into a Reverse 1031 Exchange; structuring a Reverse Zero Equity 1031 Exchange™; saving a Reverse 1031 Exchange by using a related party buyer; acquiring improvements constructed on property that you already control (own) as your like kind replacement property; and acquiring a promissory note as your like kind replacement property.

3. Broker Estate Building (2 Days)

Gary Vandenberg, S.E.C., CCIM
616-774-1031 – gary@1031inc.com

John Brennan, S.E.C., CCIM
972-991-3779 – john@thebrennancompany.com

Course Description: This course will give you proven techniques to build your own estate as well as helping your client to build theirs. Fast paced delivery of methods used by many of the finest minds in creative real estate, all designed to create and retain wealth.

4. Broker Estate Building (1 Day)

Gary Vandenberg, S.E.C., CCIM
616-774-1031 – gary@1031inc.com

John Brennan, S.E.C., CCIM
972-991-3779 – john@thebrennancompany.com

This course is a one day condensed version of our two day course and is designed to give you proven techniques to build your own estate as well as your clients. Fast paced delivery of methods used by many of the finest minds in creative real estate, all designed to create and retain wealth.

IV 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

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

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.

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

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

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 – Author & Principle Instructor
308-236-8505; sengland@ipexneb.com

Ted Blank, S.E.C., CCIM, Denver, CO – Authorized Instructor
303-748-9998; blank1031@gmail.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, Denver, CO
303-748-9998 - blank1031@gmail.com

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.

2. Owner Financing – The Paper Course

Dana Barnes, S.E.C., Moodus, CT
860-873-0400 - dbarnes@concordequitygroup.com

Course Description: This is an intensive one-day course that explores the many facets of owner financing and how to use it to close transactions, assess risk and make sound note investments. The course begins with a quick review on the use of a financial calculator to calculate present and future values of an income stream. From there, topics include analyzing notes for investment, full and partial purchases, investment-to-value vs. loan-to-value, the paperwork behind the deal and the possible use of self-directed IRA's and private investors to sell notes. The course provides numerous case studies showing how to put deals together in today's marketplace. This course is designed for experienced commercial real estate professionals who are in a position to advise clients, partners and others on the benefits of using owner financing to close commercial real estate transactions and satisfy investment objectives.

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 - chet1031@gmail.com

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.

3. Development (Understanding the Development Process) – 8 hours

Chris Dischinger, S.E.C. – Louisville, KY
502-638-0534 Ext. 28 – cdischinger@ldgdevelopment.com

William E. Stonaker, S.E.C., CCIM

817-329-2929 – wes@wilson-stonaker.com

Course Description: The course will take you through the development process from start to finish, and will provide you with valuable forms and techniques. The instructors have extensive development experience, and they will cover topics that include how to build a development team; the offer process; due diligence; demographics; an introduction to pro forma; partners, PPMs, and using equity other than cash; help with government issues; the construction process; financing; management after development; green building; brainstorming; and how counseling can help a developer.