



# Oregon

Kate Brown, Governor

**AGENDA ITEM NO.**

**I.C.**

**Real Estate Agency**  
Equitable Center  
530 Center St. NE, Suite 100  
Salem, Oregon 97301-2505  
Phone: (503) 378-4170  
Regulations Fax: (503) 373-7153  
Admin. Fax: (503) 378-2491  
[www.oregon.gov/rea](http://www.oregon.gov/rea)

## Notice of Agenda

### OREGON REAL ESTATE BOARD ZOOM MEETING

#### Regular Meeting Agenda

December 7, 2020

- I. BOARD BUSINESS – Chair Hunter**
  - A. Call to Order
  - B. Chair Hunter comments/Roll Call
  - C. Approval of the Agenda and Order of Business
  - D. Approval of 10.05.20, regular meeting minutes
  - E. Date of the Next Meeting: 02.01.21 to begin at 10am via Zoom
- II. PUBLIC COMMENT – Chair Hunter**
  - This time is set aside for persons wishing to address the Board on matters not on the agenda. Speakers will be limited to five minutes.
  - The Board Chair reserves the right to further limit or exclude repetitious or irrelevant presentations. If written material is included, 12 copies of all information to be distributed to board members should be given to the Board Liaison prior to the meeting.
  - Action will not be taken at this meeting on citizen comments. The Board, however, after hearing from interested citizens, may place items on a future agenda so proper notice may be given to all interested parties.
  - If no one wishes to comment, the next scheduled agenda item will be considered.
- III. REQUESTS FOR WAIVERS – Chair Hunter. Log.**
  - A. Jerry Jones
  - B. Eric Zechenelly
- IV. PETITION TO QUALIFY AS A CONTINUING EDUCATION PROVIDER– Chair Hunter. None.**
- V. BOARD ADVICE/ACTION – Commissioner Strode. Nominations for 2021 Board Chair and Vice Chair.**
- VI. NEW BUSINESS – Commissioner Strode. 2020 State Employees Charitable Fund Drive.**
- VII. REPORTS – Chair Hunter**
  - A. Commissioner Strode
  - B. Agency division reports-Deputy Commissioner Higley
    1. Regulations and Administration, Deputy Commissioner Higley
    2. Land Development Division, Michael Hanifin
    3. Licensing and Education, Maddy Alvarado
- VIII. ANNOUNCEMENTS – Chair Hunter.** Next board meeting: 02.01.21 to begin at 10am via Zoom
- IX. EXECUTIVE SESSION – Department of Justice AAG.**
  - Discuss pending litigation.
- X. ADJOURNMENT – Chair Hunter.**

**Interpreter services or auxiliary aids for persons with disabilities are available upon advance request.**



# Oregon

Kate Brown, Governor

Agenda Item No.  
I.D.

## Real Estate Agency

530 Center St. NE, Suite 100

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## OREGON REAL ESTATE BOARD

### Regular Meeting Minutes – via Zoom

Oregon Real Estate Agency  
Salem, OR 97301

Monday, October 5, 2020

#### BOARD MEMBERS PRESENT:

Marie Due  
Debra Gisriel  
Jose Gonzalez  
Dave Hamilton  
Lawnae Hunter, Chair  
Kim Hedding  
Pat Ihnat  
Alex MacLean, Vice Chair

#### BOARD MEMBERS ABSENT:

Susan Glen, excused

#### OREA STAFF PRESENT:

Steve Strobe, Commissioner  
Michael Hanifin, Land Development Manager  
Maddy Alvarado, Customer Service Manager  
Leandra Hagedorn, Board liaison

#### GUESTS PRESENT:

Barbara Geyer, Barbara Geyer Real Estate  
LaTasha Beal, Keller Williams Sunset Corridor

#### I. BOARD BUSINESS – Chair Hunter

- A. Call to Order. Chair Hunter called the meeting to order at 10am.
- B. Chair Hunter comments/Roll Call. Chair Hunter asked the board members to introduce themselves, and explained the role/function of the board. The board members provided an update on the market activity and wildfire impact in their individual areas.
- C. Approval of the Agenda and Order of Business.
- D. Approval of 8.3.20.01.20 regular meeting minutes.

#### MOTION TO APPROVE 8.3.20 REGULAR MEETING MINTUES BY DAVE HAMILTON

SECOND BY MARIE DUE

MOTION CARRIED BY UNANIMOUS VOTE

- E. Date of the Next Meeting: 12.07.20, to begin at 10am and will be held via Zoom video conference.

#### II. PUBLIC COMMENT – Chair Hunter. None.

- This time is set aside for persons wishing to address the Board on matters not on the agenda. Speakers will be limited to five minutes.
- The Board Chair reserves the right to further limit or exclude repetitious or irrelevant presentations. If written material is included, 12 copies of all information to be distributed to board members should be given to the Board Liaison prior to the meeting.
- Action will not be taken at this meeting on citizen comments. The Board, however, after hearing from interested citizens, may place items on a future agenda so proper notice may be given to all interested parties.
- If no one wishes to comment, the next scheduled agenda item will be considered.

#### III. REQUEST FOR WAIVERS – Chair Hunter. None.

#### IV. PETITION TO QUALIFY AS A CONTINUING EDUCATION PROVIDER - Chair Hunter. None.

#### V. BOARD ADVICE/ACTION – Commissioner Strobe. None.

#### VI. NEW BUSINESS - Commissioner Strobe

- A. OAR Fall Governance Meeting - upcoming workgroup. Commissioner Strobe explained that he reported Agency and received feedback regarding the agency's mission. He also stated that OAR discussed forming a work group to address raising the bar for property managers, which could possibly include law/rule changes and would be convening in the next month.

#### VII. REPORTS – Chair Hunter.

- A. Commissioner Strobe
  - Advertising rule work group - Work group met and working on final draft, which will be provided to board soon
  - Teleworking - Agency continues working well in telework environment
- B. Agency division report - Deputy Commissioner Higley
  1. Regulations and Administration, Deputy Commissioner Higley.

- Staffing - Frances Hlawatsch has rejoined the agency on a part-time basis as a temporary employee with minimal transition
  - Regulations Manager position will be filled approximately by early 2021
  - Case recovery efforts over the past 6 months have brought caseload down to 6 cases which should be closed/resolved by beginning of 2021
  - Prioritization of investigations assessed within 7 days
- 2. Land Development, Michael Hanifin
  - Filing activity has decreased
  - Process to reduce paper records at the State Records center is currently being developed
- 3. Education and Licensing, Maddy Alvarado
  - Staffing - Rick Marsland and Elizabeth Hardwick are both in limited positions Tami Schemmel handles processing all the background checks
  - Continuing education extension requests submitted via email & online renewals will be in progress as of November
  - PSI remote proctoring went into effect 10.01.20
  - Civil penalty/sanctions of \$1000 will be imposed on licensees who fail to provide documents requested during CTA audits

**VIII. ANNOUNCEMENTS – Chair Hunter.** Next board meeting: 12.07.20 to begin at 10am and will be held via Zoom video conference.

**IX. ADJOURNMENT – Chair Hunter**

Respectfully submitted,

Respectfully submitted,

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STEVE STRODE, COMMISSIONER

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LAWNAE HUNTER, BOARD CHAIR

**OREGON REAL ESTATE AGENCY – Experience Requirement Waiver Request Log (2018-2020)**

|  |
|--|
| <p><b>AGENDA ITEM NO.<br/>III.</b></p> |
|--|

| DATE     | NAME           | LICENSE TYPE | APPROVED/DENIED | FACTS AND BOARD DISCUSSION   |
|----------|----------------|--------------|-----------------|--|
| 04.02.18 | Ross Kelley    | PB           | Denied          | <p><b>FACTS:</b> Ross Kelley requests a waiver of experience to become a principal broker. Mr. Kelley explained his request was based on his legal experience on both residential and commercial real estate and also that his business model would be a small scale of commercial properties. Dave Koch asked Mr. Kelley about his attitude towards managing and Mr. Kelley responded that his goal would be to provide exemplary service and he has reviewed ORS Chapter 696. Mr. Koch asked Mr. Kelley if he had supervision experience and Mr. Kelley responded that has supervised paralegals, attorneys and in his current position as well. Alex MacLean asked Mr. Kelley if he has had any experience with day to day transaction activity and Mr. Kelley responded he has worked with many brokers as well as buyers and sellers.</p> <p><b>MOTION TO DENY MR. KELLEY’S REQUEST FOR WAIVER OF EXPERIENCE AND RECOMMEND MR. KELLEY MAKE HIS REQUEST AFTER ONE YEAR OF EXPERIENCE BY DAVE KOCH<br/>SECOND BY PAT IHNAT<br/>MOTION CARRIED BY UNANIMOUS VOTE</b></p>   |
| 06.04.18 | Ryan McGraw    | PB           | Approved        | <p><b>FACTS:</b> Ryan McGraw requests experience waiver to become principal broker. Mr. McGraw appeared and explained the basis for his request for waiver was that he has practiced real estate law in some form for 9 years. He also explained that for the past 2 years he has been the equivalent to a principal broker in California, however, he relocated to Oregon and did not build the business in California. Mr. McGraw obtained his broker license in Oregon about a year ago and has handled some transactions but his goal was to build a residential property management business while continuing to sell homes. Dave Koch asked Mr. McGraw what supervisory experience he had. Mr. McGraw responded that for the last 6 years he has been responsible for supervising 22 staff in his current role. Dave Hamilton asked Mr. McGraw if he was operating as both realtor with a company and also the energy company. Mr. McGraw responded that he was operating as both. Commissioner Bentley clarified the area of concern for board members was Mr. McGraw his lack of experience in supervising new licensees and Mr. McGraw responded that he agreed with that concern and would only take on licensees that are fully experienced. Discussion: Alex MacLean stated although Mr. McGraw’s lack of experience with supervision was a concern Mr. MacLean was in support of approval of this motion. Mr. Koch asked Mr. McGraw to expand on his management process/experience and Mr. McGraw described how he has handled various personnel issues as a manager/supervisor. Jose Gonzalez also expressed his support for approval of this motion. Pat Ihnat asked Mr. McGraw how he handled lease negotiations and Mr. McGraw responded that he has been involved as supervising and also has used brokers.</p> <p><b>MOTION TO APPROVE RYAN MCGRAW’S REQUEST FOR WAIVER OF EXPERIENCE BY LAWNAE HUNTER<br/>SECOND BY PAT IHNAT<br/>MOTION CARRIED BY UNANIMOUS VOTE</b></p> |
| 12.10.18 | Joseph Edwards | PB           | Withdrawn       | <p>Joseph Edwards requests an experience waiver, Mr. Edwards contacted the agency to cancel his appearance due to unsafe road conditions.</p>  |
| 04.01.19 | Ross Kelley    | PB           | Denied          | <p>Ross Kelley requests experience requirement waiver. Chair Farley asked Mr. Kelley to expand on the basis of his request for a waiver. Mr. Kelley explained that since his appearance before the board about a year ago he had completed two transactions and had a listing pending. Mr. Kelley stated that becoming a principal broker would allow him to provide quality service to his clients and also open his own real estate brokerage firm.</p> <p><b>DISCUSSION:</b> Alex MacLean expressed his appreciation to Mr. Kelley for appearing before the board for a second time and also encouraged him to continue gaining the required experience to become a principal broker. Jose Gonzalez explained that his personal experience of learning from principal brokers was instrumental for him in becoming a principal broker.</p> <p><b>MOTION TO DENY ROSS KELLEY’S REQUEST FOR WAIVER BY DEBRA GISRIEL<br/>SECOND BY DAVE HAMILTON</b></p>   |

|          |                     |    |          |  |
|----------|---------------------|----|----------|--|
|          |                     |    |          | <b>MOTION CARRIED BY UNANIMOUS VOTE</b>  |
| 6.3.19   | Ruth Howard         | PB | Approved | <p>Ruth Howard requested a waiver of experience to become a principal broker. Howard appeared in person. Howard explained the basis for her request. Worked in real estate as a secretary for an office in 1980. Over the years she owned a small business and leased homes for a retirement community, She then got her real estate license. She was asked by the outgoing principal broker and the president of her current company to become the principal broker despite not having the required experience. Dave Koch asked if Laurie Thiel had comments. Thiel spoke on Howard's behalf. Koch recused himself from the vote, but recommended approval comments. Thiel spoke on Howard's behalf, Koch recused himself from the vote, but recommended approval of the request. Pat Ihnat commented that Koch is usually is the one that questions experience waiver requests) and that Koch's support is uncharacteristic. Howard explained how her leasing experience helped her in professional real estate. Lawnae commented favorable on Howard's background, Ihnat asked how many are in the office now. Howard responded 20. Lawnae asked about trust accounting experience. Debra Gisriel asked if there is another principal broker in the office who can step in, Thiel stated that there are licensees that who could meet the requirements but no one with the desire or skills to manage, Gisriel suggested that Howard take the Principal Broker Advanced Practices course and the Principal Broker Academy right away. Dave Hamilton asked question about transaction issues. Alex MacLean inquired about time line for Bill (current PB in the office) to mentor, number of deals occurring in office and experience of brokers in office. MacLean also asked how many RE/MAX offices are in Portland, where are management meetings held, if other RE/MAX management is available to her as a resource, and what her plans are for growing office. Koch commented on history of office. MacLean confirmed Bill is retiring from management of office, not from real estate business, and asked about Dave Koch's relationship with the office and RE/MAX. Ihnat commented when Howard obtains a principal broker license, she could leave RE/MAX and open her own office. Jef Farley commented on the shortcomings of the law requiring only three years of active licensed experience to obtain a principal broker license.</p> <p><b>DISCUSSION:</b> Dave Hamilton commented he considers Dave Koch's recommendation. Lawnae agreed. Pat said leasing experience similar. Susan commented on past leasing experience and number of transactions completed.</p> <p><b>MOTION TO APPROVE RUTH HOWARD'S REQUEST FOR WAIVER OF EXPERIENCE BY PAT IHNAT.</b><br/> <b>SECOND BY DEBRA GISRIEL.</b></p> |
| 2.3.20   | Christopher Ambrose | PB | Approved | <p>Christopher Ambrose, Mr. Ambrose explained that he had been practicing attorney with Ambrose Law Group and an active attorney for approximately 30 years. He also stated that he was one of three owners of Total Real Estate Group LLC, which is a residential brokerage based out of Bend and his waiver request is based on his hands on experience as well as working very closely with the principal broker employed at Total Real Estate Group. Mr. Ambrose reported his company closed approximately 70 ns last year, bringing in 55 million in sales and that he had worked with and assisted in the selection of software. Alex MacLean asked Mr. Ambrose how his becoming a principal broker would affect the current principal broker at the company. Mr. Ambrose explained that he would continue to work closely with the principal broker but focus on managing the office and allocating duties while principal broker would continue to produce. Dave Hamilton asked Mr. Ambrose is the current principal broker was a principal in the company and Mr. Ambrose stated current principal broker is not a principal in the company. <b>Discussion:</b> Pat Ihnat, Dave Hamilton and Kim Heddingler all stated that they advocated the approval of the Mr. Ambrose's waiver request based on his experience in both the legal and real estate industry. Ms. Heddingler asked Mr. Ambrose if his intention was to continue to practice law and Mr. Ambrose affirmed.</p> <p><b>MOTION TO APPROVE CHRISTOPHER AMBROSE'S WAIVER REQUEST BY ALEX MACLEAN</b><br/> <b>SECOND BY PAT IHNAT</b><br/> <b>MOTION CARRIED BY UNANIMOUS VOTE</b></p>   |
| 12.07.20 | Jerry Jones         | PB |          |  |
| 12.07.20 | Eric Zechenelly     | PB |          |  |

## Oregon Real Estate Board Experience Requirement Waiver Request

Date: 11-15-2020

Name Jerry A. Jones

Address: 698 12th St SE Ste 140, Salem, OR 97301

Daytime Phone Number: 503-588-3586

Oregon License Number: 201232292

### GENERAL INFORMATION AND DOCUMENTATION

1. I am seeking an experience requirement waiver to become a real estate PRINCIPAL BROKER. (ORS 696.022 and OAR 863-014-0040)
2. I am currently licensed as a real estate broker in Oregon: Yes  No   
If yes, please state the dates for which you held an Oregon real estate license: 09-2019 to Present  
Was your Oregon license obtained through a reciprocal agreement with another state? Yes  No
3. I am currently licensed or have held a real estate license in another state that was issued by the state's licensing authority: Yes  No . Indicate the following

| Type of License | State Issued | Dates Active License Held |    |
|-----------------|--------------|---------------------------|----|
|                 |              | From:                     | To |
|                 |              | From:                     | To |
|                 |              | From:                     | To |

4. Per OAR 863-014-0040 and OAR 863-014-0042, I have:

|   | Yes                                 | No                                  | Date Completed | Additional Required Information  | Agency Use Only |
|---|-------------------------------------|-------------------------------------|----------------|--|-----------------|
| Completed the "Broker Administration and Sales Supervision" course for principal real estate brokers.<br><b>Must be completed PRIOR to waiver request.</b>              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 9-27-2020      | Attach original course certificate.  |                 |
| Submitted the Real Estate License Application for Principal Broker license and \$300 fee.<br><b>Must be completed PRIOR to waiver request.</b>                          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 9-28-2020      | Attach copy of confirmation letter from Agency.  |                 |
| Successfully passed the Oregon Principal Broker exam. <b>Must be completed PRIOR to waiver request.</b>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 10-20-2020     | National Score: <u>64</u><br>State Score: <u>40</u>  |                 |
| Graduated from a four-year college or university with a degree in real estate curriculum approved by the Commissioner.(863-014-0042)                                    | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |                | Attach official transcript to request, if any.   |                 |
| Graduated with a two-year community college associates degree in real estate curriculum approved by the Commissioner. (863-014-0042)                                    | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |                | Attach official transcript, if any.  |                 |
| Substantial real estate-related experience equivalent to at least 3 years active licensed experience. Include any real estate designations achieved. (OAR 863-014-0042) | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Ongoing        | Attach a written details about your additional real estate experience that would assist in the Board's consideration of your waiver request. |                 |

|   | Yes | No | Date Completed | Additional Required Information   | Agency Use Only |
|---|-----|----|----------------|---|-----------------|
| Included the number and type of real estate transactions (listings and transactions that were closed) I have completed while holding a real estate license in Oregon or in another state. | X   |    | Ongoing        | Attach a document showing the number and types of transactions you have completed while licensed, if any. |                 |

### **REQUIRED DOCUMENTS**

Listed below are the required documents to be included in the request for an experience waiver.

1. Your letter requesting a waiver of the three year active licensed experience. This letter should:
  - o State the reason for the request, including the compelling reason why you cannot wait to complete the three years of active licensed experience.
  - o Indicate the real estate experience you have that would be an acceptable substitute for the three years of required experience.
  - o Explain how you obtained the knowledge and expertise to adequately manage a real estate business, which includes supervising Oregon real estate licensees and handling clients' trust accounts.
2. Required documentation listed above in the General Information and Documentation section #4.

### **HELPFUL DOCUMENTS**

The following information is helpful, but not required, for the Board to thoroughly evaluate your request:

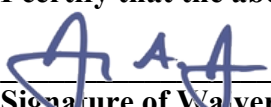
- o Letters of reference pertaining to your real estate experience
- o Letters of reference from current or past supervising principal brokers
- o Supervisory experience
- o Familiarity and experience in other related industries: escrow, title, mortgage, etc.

### **OTHER REQUIREMENTS**

- **You will be required to attend the Oregon Real Estate Board meeting when this waiver is discussed. The Board schedule will be communicated in follow-up correspondence upon receipt of your documents.**
- **Be prepared to answer questions from the Board to support your request.**
- **Waiver requests must be received at the agency no less than 21 days before the board meets.**
- **You must email all documents, including this completed and signed "Experience Requirement Waiver Request," to [madeline.c.alvarado@state.or.us](mailto:madeline.c.alvarado@state.or.us).**

***IMPORTANT NOTE:*** All documents submitted become part of the Board Packet and, therefore, public record. The Agency highly recommends that you remove/redact any confidential information on your documents, such as your social security number, date of birth, and credit card information. Please do not put the packet into any type of folder or binding.

Please direct any questions to Madeline Alvarado at 503-378-4590 or [madeline.c.alvarado@state.or.us](mailto:madeline.c.alvarado@state.or.us).

|   |                             |
|---|-----------------------------|
| <b>I certify that the above information is true to the best of my knowledge.</b>  |                             |
| <br>_____<br>Signature of Waiver Applicant | 11-15-2020<br>_____<br>Date |

### **2020 BOARD MEETING DATES**

| <b><u>MEETING DATE</u></b> | <b><u>LOCATION</u></b> | <b><u>WAIVER PACKET DUE DATE</u></b> |
|----------------------------|------------------------|--------------------------------------|
| February 3, 2020           | Eugene                 | January 13, 2020                     |
| April 6, 2020              | Teleconference         | March 16, 2020                       |
| June 1, 2020               | Teleconference         | May 11, 2020                         |
| August 3, 2020             | Videoconference        | July 13, 2018                        |
| October 5, 2020            | Videoconference        | September 14, 2018                   |
| December 7, 2020           | Videoconference        | November 16, 2018                    |

# Principal Broker Course Completion Certificate

THIS CERTIFICATE WILL VERIFY THAT:

**Jerry Jones**

Real Estate License Number: 201232293

Mailing Address of:

4742 Liberty Rd S 262, Salem, OR 97302

has successfully completed the final examination for the correspondence/Internet study course:

## **Brokerage Administration and Sales Supervision**

The course credit granted is **40 hours** on the date of **September 27, 2020** at [www.OnlineEd.com](http://www.OnlineEd.com). The date of completion is the date the actual Internet study course examination was actually taken and graded. This course is approved by the Oregon Real Estate Agency to meet the requirements of the Oregon Principal Real Estate Broker - Brokerage Administration and Sales Supervision 40 hour course required as a prerequisite to obtaining an Oregon Principal Real Estate Brokers License.

THIS OFFERING IS UNDER THE TOPIC OF  
**Brokerage Administration and Sales Supervision**

OREGON REAL ESTATE AGENCY CERTIFIED CONTINUING EDUCATION COURSE

PROVIDER COURSE NUMBER: **1038-1039**

THIS COURSE WAS SPONSORED AND THIS CERTIFICATE ISSUED BY:



OnlineEd Inc.

N. Jeffrey Sorg, School Director  
7405 SW Beveland Road, Portland, OR 97223  
mail@OnlineEd.com, <https://www.onlineed.com/>  
Phone: (503) 670-9278

Certificate Authentication Number: 1348599

This certificate is void if the above authentication number cannot be verified by OnlineEd

Click to verify: <https://www.onlineed.com/VERIFY?4FB3-3932-90F5-10AB-1D74>





# Oregon Real Estate Agency

## OR Principal Broker - State

Jones, Jerry  
4742 Liberty Rd S 262  
Salem, OR 97302  
USA

CANDIDATE ID NUMBER: \*\*\*\*\*2293  
EXAMINATION DATE: 10/30/2020  
CONTROL ID: 500175049  
BOOKING ID: NGERMXJ2

Congratulations. You have **passed** this examination. Your score is **40**.  
The passing score is **38**.

| Content Area                          | Your Score | Max Score |
|---------------------------------------|------------|-----------|
| License Law and Disciplinary Measures | 5          | 7         |
| Handling of Clients' Funds            | 5          | 5         |
| Agency Law and Rules                  | 3          | 5         |
| Regulation of Broker Activities       | 7          | 8         |
| Document Handling and Recordkeeping   | 2          | 4         |
| Property Management                   | 5          | 6         |
| Oregon Real Estate Related Statutes   | 13         | 15        |
| <b>TOTAL</b>                          | <b>40</b>  | <b>50</b> |

THIS IS NOT A LICENSE. Do not conduct professional real estate activity until you are notified by the Oregon Real Estate Agency that you are licensed.

- Your fingerprint results can take up to 4 weeks to reach the Agency.
- The Agency will receive your exam scores in 3 business days.
- Check the status of your license application by logging in to your eLicense account at <https://orea.elicense.irondata.com>.
- Passing exam scores and background clearances are good for 1 year. The Agency can only issue a license while your scores and background clearance are valid.
- The requirements for your specific license can be found via the "Get a License" link at [www.oregon.gov/rea](http://www.oregon.gov/rea).
- Once all license requirements are completed, including association to a registered business name (RBN), the Agency will issue a license.

# Oregon Real Estate Agency

## OR Principal Broker - National

Jones, Jerry  
4742 Liberty Rd S 262  
Salem, OR 97302  
USA

CANDIDATE ID NUMBER: \*\*\*\*\*2293  
EXAMINATION DATE: 10/30/2020  
CONTROL ID: 500175050  
BOOKING ID: NGERMXJ2

Congratulations. You have **passed** this examination. Your score is **64**.  
The passing score is **60**.

| Content Area                      | Your Score | Max Score |
|-----------------------------------|------------|-----------|
| Property ownership                | 5          | 8         |
| Land use controls and regulations | 3          | 3         |
| Valuation and market analysis     | 6          | 6         |
| Financing                         | 5          | 6         |
| General principles of agency      | 9          | 10        |
| Property disclosures              | 6          | 6         |
| Contracts                         | 7          | 14        |
| Leasing and Property Management   | 3          | 4         |
| Transfer of title                 | 6          | 6         |
| Practice of real estate           | 8          | 11        |
| Real estate calculations          | 6          | 6         |
| <b>TOTAL</b>                      | <b>64</b>  | <b>80</b> |

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- The Agency will receive your exam scores in 3 business days.
- Check the status of your license application by logging in to your eLicense account at <https://orea.elicense.irondata.com>.
- Passing exam scores and background clearances are good for 1 year. The Agency can only issue a license while your scores and background clearance are valid.
- The requirements for your specific license can be found via the "Get a License" link at [www.oregon.gov/rea](http://www.oregon.gov/rea).
- Once all license requirements are completed, including association to a registered business name (RBN), the Agency will issue a license.

**Jerry A. Jones**  
Broker/Owner  
Pikes Northwest, LLC  
698 12<sup>th</sup> St SE Suite 140  
Salem, OR 97301

November 16, 2020

**RE: Experience Requirement Waiver Request for Jerry A. Jones**

Dear OREA Members of the Board:

Enclosed, please find my completed packet requesting a waiver based on my past experience as a non-licensed private investor and as a current licensed Oregon Broker.

Included with my packet, you'll find letters of reference from my previous brokerage owner, a commercial real estate Principal Broker colleague, my current Principal Broker, a current client (and former real estate Broker) and a brief resume along with this more detailed version of my activity as a licensed real estate Broker, unlicensed private investor and business owner of over 25 years.

I'm in a unique position as the owner of Pikes Northwest, LLC. As you'll note in the attached supporting letters of reference, I have an excellent network of Principal Brokers with whom to consult when necessary and who also support the concept of an experience waiver given my level of performance in actual, real-world transactions.

My current Principal Broker sold Pikes Northwest, LLC to me effective February 1, 2020 and desires to wrap up his career and complete his Principal Broker obligations at the end of this year. I do not have a secondary option available for a Principal Broker and given the type of business Pikes Northwest is, securing a property management license only is not an option. And, I have the desire to continue to develop and expand the company in sales of real estate and management of both residential and commercial properties.

**LICENSED ACTIVITY: Here is the history of my real estate activity as a licensed Broker over the last 15 months:**

- On September 5, 2019, I was granted an Oregon Broker's license and affiliated with BrightHome Group in Salem after successfully completing the initial licensing requirements.
- Within 30 days, I closed my **first residential real estate transaction**, representing the Buyer in a successful **\$427,000** transaction for new construction in Salem. (Property closed under David Gollersrud, BrightHome Group.)
- About 45 days later, **I represented a Buyer on an unlisted residential purchase**, negotiating a successful **\$1,300,000** residential property sale for a home and acreage in Salem.
- In early May of 2020, I began consulting on and assisted with a successful transaction in October 2020, on the Buyer's side of a **\$1,300,000** commercial property, which included real property and a business in Salem. (Property closed under David Gollersrud, BrightHome Group.)

- In September 2020, I consulted on and assisted with the successful closing of a \$303,000 new construction residential property in Albany, which was financed with a VA home loan. (Property closed under Madyson Jones, BrightHome Group.)
- In October 2020, I successfully negotiated and completed a lease addendum, adding additional revenue for a property management client and expanding usable space with the tenant. This addendum added \$2,250 in “found” revenue for my client.
- Additionally, in October 2020, I successfully negotiated and completed a 5-year lease renewal for a property management client and tenant. This renewal totaled \$167,558.87 in future potential revenue for my client.
- In April 2020, the Pikes Northwest team, through my leadership and direction, successfully assisted six tenants and a number of clients with COVID-related Rent Deferral Agreements. To-date, all but two of those have been successfully repaid. The remaining two are on a deferral until the Governor’s Executive Order is lifted regarding same.
- In my current licensed position (per delegated, documented authority from my Principal Broker), I’m also responsible for:
  - Over \$1,000,000 in client trust funds for commercial properties and in a separate account, residential property client trust funds.
  - The administration of dozens of complex leases involving multi-tenant office buildings, industrial property, ground leases, and more;
  - Creating, reviewing and approval of annual budgets and CAM reconciliations for numerous commercial properties involved in single, double and triple net leases; and,
  - I’m engaged in ongoing consulting with property management clients regarding multiple lease renewals on complex NNN lease properties in my company’s property management portfolio to include ground leases, restaurant leases, hospital and other medical tenant leases, and national tenant leases on Class A and B buildings.
- Pikes Northwest has three unlicensed individuals employed who have delegated authority from the Principal Broker, under my supervision to help manage our portfolio of 27 properties with 143 tenants and 56 owner/clients.
- Pikes Northwest’s portfolio includes managed properties to include downtown Salem properties like the Class A LEED Platinum Certified WaterPlace Building, the Park Place Building, First Store Building, Riverview Building, Riverside Building, the Umpqua Bank Building, and many more in and outside of the Salem area.
- The team at Pikes Northwest meets at least 4 days per week to review our portfolio, train team members and troubleshoot daily issues with our clients and tenants.
- In February 2020, upon transfer of the business from the current Principal Broker, Ted Pikes, to me, we successfully completed a major software transition and upgrade.
- Since the business transition in February 2020, we have experienced 100% retention of clients.
- Our Pikes Northwest team successfully navigated the challenges of COVID-19 with tenants and owners. Our portfolio remained healthy, to include a small portfolio of residential properties and tenants.
- When Oregon was hit with COVID-19 restrictions, Pikes Northwest was able to immediately go to a virtual work environment until it was safe to return to our office.
- Twice in 2020, two different Pikes Northwest client properties (each with \$4,000,000-plus valuations) required significant tax exemption correction for two different tenants. This property tax exemption work involved identifying, negotiating and presenting offers for settlement to tenants. The team successfully worked with attorneys, our client/owners and the

tenants to settle both matters amicably. The amounts totaled well over \$150,000 in credits due to tenants.

- At the request of Pikes Northwest clients, I've completed a significant amount of due diligence for the sale of properties to include novations and estoppel certificates.
- I've consulted with the owner (Jim Iverson) of the development known as Laike Plaza in Salem, on Liberty Road South by developing and providing *pro forma* financials to assist with income and operating expense forecasts, and lease-up information on residential apartments and separate commercial tenants.
- My company, Pikes Northwest, LLC, also publishes a print (and mailed) newsletter that reaches over 640 property owners, licensees, investors, clients and others in Oregon, California and Washington on topics related to real estate ownership. I am responsible for 1/3 of the content. I have an attorney and business owner each provide 1/3 of the remaining content. We're in our 10<sup>th</sup> month of publishing.
- I have engaged in over 45 hours of continuing education since earning my Broker's license. I am anxious to participate with in-person CE opportunities in the coming months and will continue to advance my education in the online environment in the interim.

#### **Here is a short history of my unlicensed real estate activity over the last 20 years:**

- I have been a single-family residential property owner and investor in Salem for the last 20-plus years, completing more than a half-dozen purchases and sales since 2005.
- My latest personal purchase was an investment property (duplex) in March 2019, prior-to my licensing. That property is in escrow to close in December to a properly disclosed Buyer.
- I have purchased well over a dozen parcels of raw land in a number of areas in Oregon and Colorado, to include a development property at the coast which included a large marina (comprising an Oregon state lands submerged land lease), acreage and an existing restaurant building for over \$2,650,000.
- I have purchased and sold five multi-family properties outside of Oregon.
- I have assembled and participated in eight (8) or more different investment and development property syndications since 2005, having been responsible as the managing member. My duties included identifying properties, negotiating the purchase of, maintaining, accounting of and disposition of the properties. The total transaction values exceeded several million dollars.
- From 2006 to 2008, I organized three real estate training seminars involving the basics of single-family home investing, private lending, raw land development, and apartment and commercial property investment.
- From 2006 to 2008, I wrote and published a real estate newsletter with a national subscriber base of dental professionals and other real estate investors.

#### **Here is a short history of my business ownership and management of licensed and unlicensed professionals in a variety of businesses:**

For the last 25 years, I have owned and operated Jerry Jones Direct, a marketing, coaching and advertising firm engaging dental and other medical and legal professionals and coaching them on best practices for business operations, providing turn-key marketing services, and more. I have been responsible for employing and leading a team of up to 17 people in this business, all of whom have worked virtually for the last 8 years. The first employee is still with the company.

Simultaneously, for a period of 15 years, I owned and operated SofTouch Dental, Inc., a dental practice management company that operated dental practices in Oregon. We worked hand-in-hand with licensed Dentists to provide an exceptional dental patient experience in our dental offices. We were responsible for following all applicable state and federal rules and laws regarding the operation and delivery of dental care to patients, which included OSHA, ODA, EPA, the Oregon State Dental Board and the American Dental Association. My company provided both licensed and unlicensed services by employing all dental professionals with the exception of licensed Dentists and the actual delivery of clinical dental care. I sold my interest in 2018 to one of the dentists providing services.

For a period of a period of five years, I was the owner of a state-licensed Department of Education private career school, Willamette Valley Dental Assisting School. We provided licensed education and job placement assistance for those wishing to enter the dental industry as dental assistants. This business required a significant amount of regulatory compliance, supervisory experience with instructors, accounting and long-term records retention.

This concludes my experience relevant to this waiver request. I respectfully request a grant of a waiver of experience in pursuit of the Principal Broker license. I appreciate the opportunity.

Sincerely,

A handwritten signature in blue ink, appearing to read "J. A. Jones".

Jerry A. Jones  
Broker/Owner  
Pikes Northwest, LLC  
698 12<sup>th</sup> St SE Ste 140  
Salem OR 97301

RESUME of  
**JERRY A. JONES**  
Oregon Licensed Broker #201232293  
Pikes Northwest, LLC  
698 12<sup>th</sup> St SE Ste 140  
Salem, OR 97301

**SUMMARY:**

The purpose of this resume is to concisely relay my experience, skillset and success as a business owner, an unlicensed real estate investor, and licensed real estate broker in my pursuit of obtaining an experience waiver for the Oregon Principal Broker license from the Oregon Real Estate Agency.

**EXPERIENCE:**

*February 1, 2020 – Current*

**Real Estate Broker, Property Manager & Owner**, Pikes Northwest, LLC Commercial Property Management. Responsible for an excess of \$1MM in client trust funds and monthly account reconciliations, multiple annual property budgets, multiple CAM reconciliations, complex lease administration, client and tenant relations, client consulting, supervision and training of unlicensed employees, writing and publishing a monthly column for client/prospect newsletter, and staying current with and operating under OREA rules.

*September 5, 2019*

**Issued Oregon Broker License #201232293**

*September 5, 2020 – January 31, 2020*

**Residential and Commercial Real Estate Broker**, BrightHome Real Estate Group. Realtor® designation awarded. Closed multiple transactions totaling over \$1.7MM in first 4 months.

*September 1996 – Current*

**Owner, Jerry Jones Direct** (Dental marketing & consulting). Generated millions in total revenue. Supervised dozens of employees and key vendors working remotely in different states. Clients consisted of multi-location, multi-doctor groups. Provided business consulting and marketing solutions to dental practices from \$500K to \$25MM. Planned sale of the business in 2021 to transition out.

*August 2003 - 2018*

**Owner, SofTouch Dental, Inc.** (Dental practice operations and management). Generated millions in total revenue. With partner, started dental offices serving Oregon Health Plan insured and general population. Sold interest in 2018.

*2007-2012*

**Owner, Willamette Valley Dental Assisting School, LLC.** Founder and partner of an Oregon Dept. of Education, licensed private career school. Responsible for hiring instructors, curriculum

development and content, licensing and conforming to state private career school rules, enrollment and accounting. Business was sold in 2012.

*2005 – 2019*

**Unlicensed personal real estate investment activity.** Purchased and sold over twenty properties to include raw land, multi-family, single family, commercial, and development properties solo and by assembling syndications with other private investors. Private lender for single family home buyers. Wrote and published 24 issues of a private investor real estate newsletter. During this time, I also attended three multi-day real estate education seminars focused on foreclosures, raw land, residential and commercial property development. From 2006-2008, with support, I promoted and conducted three real estate education events. Currently selling a multi-family property which is in closing with a properly disclosed party. Total personal, unlicensed purchases and sales of over \$6MM conservatively.

*1993-1995*

**Worked as a staffer for a US Senator** in Washington, DC, starting out as college intern. Also held short stints at US Dept of Commerce NAFTA Desk, and US Dept of Agriculture.

## **EDUCATION:**

*September 2020*

OnlineEd.com – **Oregon Principal Broker’s Brokerage Administration & Sales Supervision Course** (40 hours)

*September 2019 – December 2019*

Commercial Assoc of Brokers – **Law & Rule Course** (3 hours)  
Commercial Assoc of Brokers – **Obstacles to Closing Your Real Estate Deal** (1 hour)  
Commercial Assoc of Brokers – **Triple Net vs. Gross Lease** (1 hour)  
Commercial Assoc of Brokers – **Creative Structuring** (1 hour)  
Oregon Assoc of Realtors® – **Real Estate Investing for Realtors®** (1 hour)  
Oregon Assoc of Realtors® – **Oregon Property Tax Appeal Process** (1 hour)

*June 2019*

Lexington/TrainAgents.com – **Oregon Broker Pre-License Course** (150 hours)

*2005-2007*

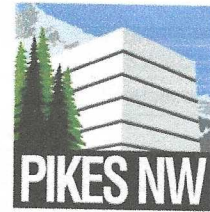
Various private real estate education courses to include foreclosure properties (24 hours), commercial development (32 hours), and single-family properties (16 hours).

*1990-1994*

**Pacific University, Bachelor of Science**



November 11, 2020



OREA  
Members of the Board  
Salem, OR 97301

RE: Experience Requirement Waiver Request for Broker Licensee Jerry A Jones

Dear Members of the Board:

I have had the pleasure of knowing and working with Jerry A Jones for over two years. I am the Principal Broker of Pikes Northwest, LLC (PNW.) I owned and operated PNW for 15 years and have continued to be active in the company and serving as the Principal Broker. I sold my interest in the company to Jerry on January 31, 2020.

Since then, as Principal Broker, I have actively supervised PNW and specifically Jerry to whom I have delegated significant authorities to conduct the daily operations of PNW, including transactions and reconciliations of PNW's various Client Trust Accounts which I review and approve monthly.

The authority delegated to Jerry also includes oversight and supervision of the daily activities of the PNW staff located in our Salem office and to have direct contact with the company's clients, tenants, and vendors. I have reviewed his new management contracts, PNW advertising and other documents, as required.

Jerry has extensive experience in business and specifically in real estate due to his prior investments in various businesses and ownership of residential and commercial real estate before and after becoming a Licensee in Oregon.

I have found Jerry to be very professional and competent, from the time he was completing Due Diligence for his purchase of PNW from me, to his timely close of our transaction, and then during the orientation and training he received from me during the transitional period subsequent to our transaction. I have retained certain Principal Broker authorities, per the regulations, and in the areas that I have chose to delegate PB authority to Jerry I found him to be willing and able to comply with OREA rules and regulations, and competent with his supervision of PNW staff, management of our client's properties and his own personal real estate activity.

Jerry has significant experience in our industry and has completed the educational and exam requirements to become a Principal Broker in the State of Oregon. I have no reservations about recommending that the typical "experience requirement" to become a Principal Broker be waived for Jerry, which would allow him to become the Principal Broker of Pikes Northwest, LLC.

Sincerely,

A handwritten signature in black ink that reads "Theodore Pikes". The signature is written in a cursive, flowing style.

Theodore Pikes  
Principal Broker  
ted@pikesnw.com  
Direct #: 503 869 5308



Oregon Real Estate Agency  
OREA Members of the Board  
530 Center St. NE, Suite 100  
Salem, Oregon 97301

November 8, 2020

Re: Jerry Jones, Pikes Northwest LLC - Experience Requirement Waiver Request

OREA Members of the Board:

I have been a commercial real estate broker in Oregon since 1995, receipt of my real estate license. I have worked only on commercial real estate, both sales and leasing transactions. In addition, I have had the opportunity to interface with numerous real estate property management companies over the years, companies which have exhibited various ranges of capabilities.

I was re-introduced to Jerry Jones upon his acquisition of Pikes Northwest LLC (Pikes), which Pikes was responsible for the management of properties I was also engaged to sell. I had the pleasure to work closely with Jerry on a recent disposition of an investment property in our mutual client's portfolio. Jerry's professional approach to his work and his knowledge and understanding of the property was instrumental in finalizing the complex transaction. Jerry exhibited a strong willingness to help solve an unknown property tax issue to the satisfaction of his client (Seller) and ultimately to the Buyer as well.

Jerry is well versed in real estate property management rules, regulations and compliance. I view Jerry as a partner when Pikes is responsible for the management of any commercial property I am involved with - I am confident I will be provided with accurate property records and information.

I would certainly recommend Jerry Jones to any commercial real estate property owner requiring property management in the Willamette Valley. It is a pleasure to work with Jerry and observe his dedication and fiduciary duty to his client. Jerry has proven to me, to be a real asset to our commercial property industry.

I can be reached at 503.510.9504, if you have any questions or require additional information.

Sincerely,

A handwritten signature in blue ink that reads "Terri Frohmayer".

Terri Frohmayer, Principal Broker  
First Commercial Real Estate Services LLC  
365 State St., Salem, OR 97301

Cc: Joshua Kay, Owner  
First Commercial Real Estate Services LLC

**From:** dennis LAST NAME denyoung@comcast.net  
**Subject:** Letter of Recommendation  
**Date:** November 6, 2020 at 4:11 PM  
**To:** Jerry Jones jerry@pikesnw.com

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November 6, 2020

Oregon Real Estate Agency  
530 Center St. NE, Suite 100  
Salem, OR 97301

Re: Jerry Jones - Principal Broker Exemption Waiver

Gentlemen & Ladies:

I am writing to you regarding Jerry Jones who is the owner of Pikes Northwest Commercial Property Management Company in Salem.

I have been involved full time in the real estate industry for over 45 years in Oregon and California. My activities have been primarily involved in the industrial and commercial sectors as a broker, investor and developer of industrial and office properties. Currently I am the managing partner in three office properties in Salem.

I have employed Pikes Northwest to manage several office properties for over 20 years. To my knowledge Jerry purchased Pikes Northwest in 2019 and I have been involved with him since that time. To my knowledge Jerry has been actively involved in and owned or managed various businesses for many years. He truly has an entrepreneurial spirit, is very creative and hard working.

Jerry has proven to be very honest, professional, knowledgeable, cooperative, creative and responsive in all aspects of the commercial property management business.

I am very satisfied with his services thus far in our relationship and would gladly recommend him to others. I am confident in his leadership abilities within his businesses and in the community. I feel he would be most worthy as a Principal Broker Licensee and I support and recommend the approval of his application.

I would be pleased to respond to any questions you may have. I can be reached by phone at (503) 510-1203 or email at denyoung@comcast.net.

Respectfully submitted,

Dennis Young  
Sent from XFINITY Connect Mobile App

11/5/2020

Oregon Real Estate Agency  
530 Center St. NE, Suite 100  
Salem, OR 97301

RE: Jerry Jones – Principal Broker Exemption Waiver

To whom it may concern,

I am writing to you on behalf my colleague Jerry Jones to support his application for Real Estate Principal Broker licensure. Jerry is a very savvy real estate investor with decades of business and real estate experience. Jerry was appointed with my brokerage, BrightHome Real Estate Group, before purchasing his property management company, Pikes Northwest LLC.

While affiliated with BrightHome Real Estate Group, I found Jerry to be extremely knowledgeable, professional, and conscientious. He demonstrated a thorough understanding of our profession and the ability to navigate complex issues with ease. Jerry led several large transactions we worked on together and was successful in finding win-win solutions for all interested parties while garnering favor with each cooperating broker.

Jerry's leadership, desire to learn, and eye for compliance and troubleshooting, make him an ideal candidate worthy of Principal Broker licensure and to lead other professionals in our industry.

I absolutely support Jerry in every way and will not hesitate to refer commercial clients and perspective licensees to his brokerage.

Please feel free to call me should you require any further information.

Respectfully,



David Gollersrud  
Owner/Sales Leader  
BrightHome Real Estate Group  
3505 Commercial St. SE  
Salem, OR 97302  
503 374-5374 cell  
[David@BrightHomeGroup.com](mailto:David@BrightHomeGroup.com)

# BrightHome Real Estate Group

Amy Clark

Amy@BrightHomeGroup.com



11/19/2020

Ms. Alvarado,

My name is Amy Clark, I'm the Principal Broker and an Owner of BrightHome Real Estate Group. I'm writing you on behalf of a professional colleague Jerry Jones. I understand Mr. Jones is applying for his Principal Broker's license to be approved prior to him having the mandated three years of experience.

I've known Mr. Jones for approximately 2 years in business and at one time, he was affiliated with our company as a licensee working mostly in commercial real estate where he showed an incredible aptitude for not only business but also the real estate industry. While he didn't have his license with us for long as a new and exciting opportunity came available to him, I was very impressed by his ability to decipher and be relied on to execute and professionally and intelligently. Mr. Jones was always careful to exercise diligence in his research when working through files and challenges.

I fully endorse him to be capable and trustworthy to hold the license of Principal Broker and sincerely hope with his extensive business back-round you will sincerely consider advancing his license status at this time.

Respectfully, I also want to acknowledge that Mr. Jones had requested this communication weeks ago however, I was recovering from surgery and just now getting back into the office. Thank you for considering this late submission on his behalf!

Please feel welcome to contact me if you have any questions I can help with in this decision.

Sincerely,

Amy Clark

503-580-7190

Amy@brighthousegroup.com

# Oregon Real Estate Board

## Experience Requirement Waiver Request

Date: 11/10/20  
 Name: Eric Zechenelly  
 Address: 15013 NW Elaina Ct Portland OR 97229  
 Daytime Phone Number: 503-662-2946 Oregon License Number: 20121716

**GENERAL INFORMATION AND DOCUMENTATION**

- I am seeking an experience requirement waiver to become a real estate PRINCIPAL BROKER. (ORS 696.022 and OAR 863-014-0040)
- I am currently licensed as a real estate broker in Oregon: Yes  No   
 If yes, please state the dates for which you held an Oregon real estate license: 9/23/2019 to Current  
 Was your Oregon license obtained through a reciprocal agreement with another state? Yes  No
- I am currently licensed or have held a real estate license in another state that was issued by the state's licensing authority: Yes  No . Indicate the following

| Type of License | State Issued | Dates Active License Held |    |
|-----------------|--------------|---------------------------|----|
|                 |              | From:                     | To |
|                 |              | From:                     | To |
|                 |              | From:                     | To |

4. Per OAR 863-014-0040 and OAR 863-014-0042, I have:

|   | Yes                                 | No                                  | Date Completed        | Additional Required Information  | Agency Use Only |
|---|-------------------------------------|-------------------------------------|-----------------------|--|-----------------|
| Completed the "Broker Administration and Sales Supervision" course for principal real estate brokers.<br><b>Must be completed PRIOR to waiver request.</b>              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <u>2/26/2020</u>      | Attach original course certificate.  |                 |
| Submitted the Real Estate License Application for Principal Broker license and \$300 fee.<br><b>Must be completed PRIOR to waiver request.</b>                          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <u>2/23/2020</u>      | Attach copy of confirmation letter from Agency.  |                 |
| Successfully passed the Oregon Principal Broker exam. <b>Must be completed PRIOR to waiver request.</b>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <u>11/1/2020</u>      | National Score: <u>67/80</u><br>State Score: <u>42/50</u>  |                 |
| Graduated from a four-year college or university with a degree in real estate curriculum approved by the Commissioner. (863-014-0042)                                   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <u>September 2019</u> | Attach official transcript to request, if any.   |                 |
| Graduated with a two-year community college associates degree in real estate curriculum approved by the Commissioner. (863-014-0042)                                    | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |                       | Attach official transcript, if any.  |                 |
| Substantial real estate-related experience equivalent to at least 3 years active licensed experience. Include any real estate designations achieved. (OAR 863-014-0042) | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |                       | Attach a written details about your additional real estate experience that would assist in the Board's consideration of your waiver request. |                 |

|   | Yes | No | Date Completed | Additional Required Information   | Agency Use Only |
|---|-----|----|----------------|---|-----------------|
| Included the number and type of real estate transactions (listings and transactions that were closed) I have completed while holding a real estate license in Oregon or in another state. | ✓   |    |                | Attach a document showing the number and types of transactions you have completed while licensed, if any. |                 |

### **REQUIRED DOCUMENTS**

Listed below are the required documents to be included in the request for an experience waiver.

1. Your letter requesting a waiver of the three year active licensed experience. This letter should:
  - o State the reason for the request, including the compelling reason why you cannot wait to complete the three years of active licensed experience.
  - o Indicate the real estate experience you have that would be an acceptable substitute for the three years of required experience.
  - o Explain how you obtained the knowledge and expertise to adequately manage a real estate business, which includes supervising Oregon real estate licensees and handling clients' trust accounts.
2. Required documentation listed above in the General Information and Documentation section #4.

### **HELPFUL DOCUMENTS**

The following information is helpful, but not required, for the Board to thoroughly evaluate your request:

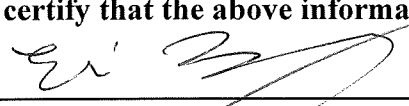
- o Letters of reference pertaining to your real estate experience
- o Letters of reference from current or past supervising principal brokers
- o Supervisory experience
- o Familiarity and experience in other related industries: escrow, title, mortgage, etc.

### **OTHER REQUIREMENTS**

- You will be required to attend the Oregon Real Estate Board meeting when this waiver is discussed. The Board schedule will be communicated in follow-up correspondence upon receipt of your documents.
- Be prepared to answer questions from the Board to support your request.
- Waiver requests must be received at the agency no less than 21 days before the board meets.
- You must email all documents, including this completed and signed "Experience Requirement Waiver Request," to [madeline.c.alvarado@state.or.us](mailto:madeline.c.alvarado@state.or.us).

**IMPORTANT NOTE:** All documents submitted become part of the Board Packet and, therefore, public record. The Agency highly recommends that you remove/redact any confidential information on your documents, such as your social security number, date of birth, and credit card information. Please do not put the packet into any type of folder or binding.

Please direct any questions to Madeline Alvarado at 503-378-4590 or [madeline.c.alvarado@state.or.us](mailto:madeline.c.alvarado@state.or.us).

|   |   |
|---|---|
| <b>I certify that the above information is true to the best of my knowledge.</b>  |   |
| <br><hr style="border: 0; border-top: 1px solid black;"/> <b>Signature of Waiver Applicant</b> | <p style="text-align: center; font-size: 1.2em;">11/16/20</p> <hr style="border: 0; border-top: 1px solid black;"/> <b>Date</b> |

### **2020 BOARD MEETING DATES**

| <b><u>MEETING DATE</u></b> | <b><u>LOCATION</u></b> | <b><u>WAIVER PACKET DUE DATE</u></b> |
|----------------------------|------------------------|--------------------------------------|
| February 3, 2020           | Eugene                 | January 13, 2020                     |
| April 6, 2020              | Teleconference         | March 16, 2020                       |
| June 1, 2020               | Teleconference         | May 11, 2020                         |
| August 3, 2020             | Videoconference        | July 13, 2018                        |
| October 5, 2020            | Videoconference        | September 14, 2018                   |
| December 7, 2020           | Videoconference        | November 16, 2018                    |

To the Oregon Real Estate Agency,

This letter is supplemental to my request to have the 3 year license requirement waived to apply for a principal broker's license in OR.

I have been in the real estate industry since childhood. My family owns and operates multiple businesses relating to real estate sales, development, finance, property management, development, insurance and leasing. I have been working and performing for these companies since I was in high school as they are all operated out of the same corporate office.

- **Financial Services Unlimited Inc.** is a mortgage finance company originating mortgages for both real and chattel property (Manufactured homes on leased land) in 48 states, now OR, WA, CA, and TX.
- **Financial Service Insurance** is a P & C Insurance agency to insure P & C in OR and WA.
- **Financial Services Properties, & Willamette Equity Group** owns and operates multiple commercial properties in OR. I have been involved in tenant relations and property management. In our family held companies, I have performed due diligence and underwriting for development feasibility. Upon becoming a broker I have completed price opinions and listed WEG's inventory for sale.
- **Willamette Homes** I am responsible for business development that specializes in the affordable housing market. My responsibilities are both wholesale and retail sales activities. Private land development & in park development and existing listing sales in parks within OR and WA is the main scope of our business. This company works in conjunction with privately held finance and insurance companies. With this company, I work with both buyers, sellers, manufactured home park owners and oversee multiple in-house sales agents for the sales of manufactured homes. I also work with local jurisdictions and independent contractors for development permits of new manufactured homes on property. I directly work with Oregon Energy Trust in the replacement and expansion of their affordable housing programs and work with several private held investment firms to redevelop communities. These new homes are either spec development or private sales to consumers. We provide over 20 new houses a year in development of parks, subdivisions and private consumers in addition to the in park listings from Vancouver, WA down to Eugene, OR

The supplemental form "Resume" is a limited resume. This includes my time at DR Horton where I managed 10+ subdivisions and 1,000 lots/homes in OR & WA. My project management role was to supplement the acquisition, due diligence and construction of new land or finished subdivisions from start to finish, with the majority of my projects in North Bethany OR and Vancouver, WA.

In addition, please see the attached file "Diploma" which was awarded to me from Portland State University for the completion of Master Degree in Real Estate Development. We extensively studied



Eric Zechenelly  
OREA Education Waiver Request  
11/2/2020

finance, building construction, policy, developmental, law, and economics. We also performed multiple projects and proposals for developers in OR along with presenting our analysis for King City's expansion plan under the UGB rezoning.

I hope the attached forms and this document show that I have sufficient knowledge and experience in the real estate industry. If more information is needed to approve my request to waive the 3 year requirement, please let me know at the contact information below. As pursuant to ORE 863-014-0042

Eric Zechenelly  
503 662 2946  
[ericzechenelly@gmail.com](mailto:ericzechenelly@gmail.com)

## FINANCIAL SERVICES GROUP OF COMPANIES

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Oregon Real Estate Board  
530 Center Street NE Suite 100  
Salem, OR 97301

November 9, 2020

### RE: Eric Zechenelly Principal Broker Request

Dear Real Estate Board,

The referenced party has asked me for a letter outlining his professional work experience during his tenure with our group of Companies which supports the affordable housing and commercial real estate markets. As a privately held family group of Companies, Eric has been immersed in the housing and commercial real estate markets while growing up. He has gained invaluable practical business experience ranging from personal property home sales, site development, consumer finance & insurance coordination for homes sales and commercial property management. Please refer to the Exhibit A which summarizes his recent home sales activity with Pacific Homes NW LLC dba Willamette Homes, which is most germane to his Principal Broker request.

Eric's practical business experience and advanced education has created a solid foundation for a professional Real Estate Principal Broker in an ever-evolving real estate industry.

Should you have any questions, please contact me at 503-810-9449.

Sincerely,



Bruce Zechenelly  
President/Managing Member

BAZ/yr

Attachment

Financial Services Insurance, Inc # 100161577 – Financial Services Properties, Inc.  
Financial Services Unlimited, Inc. NMLS #3242 – Pacific Homes NW, LLC dba Willamette  
Homes #MSD 152 – Willamette Equity Group, LLC



10/2/2019-Current

## Real Property Transaction History EXHIBIT "B"

| <b><i>Sold</i></b> |            | <b><i>Current Listing</i></b> |            |
|--------------------|------------|-------------------------------|------------|
| Cornelius          | \$ 430,000 | Beaverton                     | \$ 784,000 |
|                    | \$ 430,000 |                               | \$ 784,000 |

|                    |                   |  |                   |
|--------------------|-------------------|--|-------------------|
| <b>Gross Total</b> | <b>\$ 430,000</b> |  | <b>\$ 784,000</b> |
|--------------------|-------------------|--|-------------------|

# Eric Zechenelly

15013 NW Elaina Ct, Portland  
OR 97229  
(503) 334 7879  
ericzechenelly@gmail.com

## EXPERIENCE

**Willamette Homes**, Beaverton, OR- Business & Land  
Development  
2018 - Present

Sales of manufactured homes in parks both new and existing, rehab homes, park redevelopment, and private land development. Also performed functions dedicated to assisting sister companies Financial Series Unlimited, Financial Services Insurance, Financial Services Property & Willamette Equity Group

**D.R. Horton Inc. - Portland**, Portland, OR - Project Manager  
Land Development  
2017 - 2018

Managing new subdivisions and oversaw projects budgets in excess of \$50 million. Managed governmental agency relationships with permit planning, performance bonds and final development with subcontractors.

**Financial Services Unlimited & Willamette Homes**,  
Beaverton, OR— Project Analyst & Building Operations  
2009 - 2017

**Colliers International**, Portland, OR—Internship  
2015 Summer

## EDUCATION

**Portland State University**, Portland, OR -Master of Real  
Estate Development (MRED)  
2019

**Portland State University**, Portland, OR—BS Business:  
*Leadership/ Management Focus & Student Athlete*  
2017

**Montana State**, Bozeman, MT—*Marketing Focus & Student  
Athlete*  
2015 - 2016

**Clark College**, Vancouver, WA—*AA Transfer & Student Athlete*  
2013 - 2014

## Volunteer

**SOLVE Oregon**

**Little Bobcat Track and  
Field Montana State  
Bozeman, MT**

**Montana Boys and Girls  
Club of America,  
Bozeman, MT**

**CASA Court Appointed  
Foster Advocate  
Portland, OR**

# Portland State University

Portland



Oregon

On recommendation of the University Faculty, and by the authority of the State of Oregon, Portland State University hereby confers upon

**Eric S Zechenelly**  
the degree of

**Master of Real Estate Development**

with all the rights and privileges appertaining thereto. Given on this Seventeenth Day of August, Two Thousand and Nineteen.

*Gregory S. Munkley*  
President of the Board

*Steph P*  
President of the University

SSN \*\*\*\*\*1478

PSU ID 945829888

Date of Birth: 06-OCT

Date Issued: 17-SEP-2020

Record of: Eric S Zechenelly

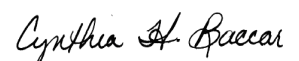
Page: 1

Issued To: Eric Zechenelly  
 Parchment DocumentID: 30518196

| COURSE LEVEL:   | SUBJ NO.                           | COURSE TITLE                 | CRED GRD    | PTS R       |
|---|------------------------------------|------------------------------|-------------|-------------|
| Graduate  |                                    |                              |             |             |
| High School: SUNSET HS 13-JUN-2013                        |                                    |                              |             |             |
| First Admit: Fall 2017 Quarter                            |                                    |                              |             |             |
| Last Admit: Spring 2018 Quarter                           |                                    |                              |             |             |
| Current Major(s):   | Institution Information continued: |                              |             |             |
| Major : Real Estate Development                           | RE 539                             | REAL ESTATE VALUATION I      | 4.00 A-     | 14.68       |
|   | USP 624                            | DEVELOPMENT PROJECT DESIGN   | 3.00 B-     | 8.01        |
|   | Ehrs: 8.00                         | GPA-Hrs: 7.00                | QPts: 22.69 | GPA: 3.24   |
| Degrees Awarded : Master of Real Estate Devlp 17-AUG-2019 | Winter 2019 Quarter                |                              |             |             |
| College : The School of Business                          | RE 510                             | TOP: ECONOMICS & REAL ESTATE | 1.00 P      | 0.00        |
| Major : Real Estate Development                           | RE 522                             | REAL ESTATE FINANCE II       | 4.00 C+     | 9.32        |
|   | USP 529                            | GREEN BUILDINGS I            | 3.00 A-     | 11.01       |
|   | Ehrs: 8.00                         | GPA-Hrs: 7.00                | QPts: 20.33 | GPA: 2.90   |
|   | Spring 2019 Quarter                |                              |             |             |
|   | USP 510                            | TOP: REAL ESTATE DEVELOP II  | 3.00 B+     | 9.99        |
|   | USP 527                            | DOWNTOWN REVITALIZATION      | 3.00 B+     | 9.99        |
|   | Ehrs: 6.00                         | GPA-Hrs: 6.00                | QPts: 19.98 | GPA: 3.33   |
|   | Summer 2019 Quarter                |                              |             |             |
|   | RE 562                             | REAL ESTATE DEVELOP WKSHP    | 4.00 A      | 16.00       |
|   | USP 563                            | REAL ESTATE CONSTRUCTION     | 3.00 B+     | 9.99        |
|   | Ehrs: 7.00                         | GPA-Hrs: 7.00                | QPts: 25.99 | GPA: 3.71   |
|   | Last Standing: Grad Good Standing  |                              |             |             |
|   | ***** TRANSCRIPT TOTALS *****      |                              |             |             |
|   |                                    |                              | Earned Hrs  | GPA Hrs     |
|   |                                    |                              | Points      | GPA         |
|   | TOTAL INSTITUTION                  | 55.00                        | 53.00       | 178.68 3.37 |
|   | ***** END OF TRANSCRIPT *****      |                              |             |             |
| Fall 2017 Quarter   |                                    |                              |             |             |
| USP 538   | REAL ESTATE LAW                    | 3.00 A                       | 12.00       |             |
| USP 612   | COMMUNITY, PLANNING, & ETHICS      | 4.00 A-                      | 14.68       |             |
| Ehrs: 7.00  | GPA-Hrs: 7.00                      | QPts: 26.68                  | GPA: 3.81   |             |
| Winter 2018 Quarter                                       |                                    |                              |             |             |
| USP 523   | REAL ESTATE DEV I                  | 4.00 B+                      | 13.32       |             |
| USP 569   | SUSTAINABLE CITIES & REGIONS       | 4.00 B                       | 12.00       |             |
| Ehrs: 8.00  | GPA-Hrs: 8.00                      | QPts: 25.32                  | GPA: 3.16   |             |
| Spring 2018 Quarter                                       |                                    |                              |             |             |
| RE 521  | REAL ESTATE FINANCE I              | 4.00 A                       | 16.00       |             |
| RE 573  | HOUSING ECONOMICS                  | 4.00 B-                      | 10.68       |             |
| Ehrs: 8.00  | GPA-Hrs: 8.00                      | QPts: 26.68                  | GPA: 3.33   |             |
| Summer 2018 Quarter                                       |                                    |                              |             |             |
| RE 548  | REAL ESTAT MARKET ANALYSIS         | 3.00 A-                      | 11.01       |             |
| Ehrs: 3.00  | GPA-Hrs: 3.00                      | QPts: 11.01                  | GPA: 3.67   |             |
| Fall 2018 Quarter   |                                    |                              |             |             |
| RE 531  | EXEC PERSPECTIVES REAL ESTATE      | 1.00 P                       | 0.00        |             |
| ***** CONTINUED ON NEXT COLUMN *****                      |                                    |                              |             |             |



This official transcript does not require a raised seal.



Cynthia H. Baccar  
 Registrar  
 Portland State University

# Oregon Real Estate Agency

## OR Principal Broker - State

Zechenelly, Eric  
11950 SW 2nd St #300  
Beaverton, OR 97005  
USA

CANDIDATE ID NUMBER: \*\*\*\*\*1716  
EXAMINATION DATE: 11/02/2020  
CONTROL ID: 500177885  
BOOKING ID: Z9K8Y8MP

Congratulations. You have **passed** this examination. Your score is **42**.  
The passing score is **38**.

| Content Area                          | Your Score | Max Score |
|---------------------------------------|------------|-----------|
| License Law and Disciplinary Measures | 5          | 7         |
| Handling of Clients' Funds            | 3          | 5         |
| Agency Law and Rules                  | 5          | 5         |
| Regulation of Broker Activities       | 7          | 8         |
| Document Handling and Recordkeeping   | 4          | 4         |
| Property Management                   | 4          | 6         |
| Oregon Real Estate Related Statutes   | 14         | 15        |
| <b>TOTAL</b>                          | <b>42</b>  | <b>50</b> |

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- Your fingerprint results can take up to 4 weeks to reach the Agency.
- The Agency will receive your exam scores in 3 business days.
- Check the status of your license application by logging in to your eLicense account at <https://orea.elicense.irondata.com>.
- Passing exam scores and background clearances are good for 1 year. The Agency can only issue a license while your scores and background clearance are valid.
- The requirements for your specific license can be found via the "Get a License" link at [www.oregon.gov/rea](http://www.oregon.gov/rea).
- Once all license requirements are completed, including association to a registered business name (RBN), the Agency will issue a license.



# Oregon Real Estate Agency

Real Estate Broker

Score Report



**Eric Zechenelly**

**11950 SW 2nd St #300**

**Beaverton, Oregon 97005**

**Candidate ID: XXX-XX-1716**

**Exam: OR Principal Broker Exam - OR Principal Broker - National**

**Exam Date: 10/01/2020**

---

**PASSING SCORE: 1.0 (75%)**

**YOUR SCORE: 67.0**

**GRADE: PASS**

**Congratulations!** You have passed the **OR Principal Broker - National Examination.**

The following is an analysis of your performance on the examination. For a detailed description of the subject matter included within each Topic, please refer to the PSI Candidate Information Bulletin.

| <b>Topic</b> | <b>Number of Questions</b> | <b>Number Correct</b> |
|--------------|----------------------------|-----------------------|
| Topic 1      | 1                          | 0.0                   |

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**This score report is provided as a record of your scores. Do not send it to the Real Estate Agency.**



4742 Liberty Road S, # 410

Salem OR 97302

## **CONTINUING EDUCATION CERTIFICATE OF COMPLETION**

---

Eric Zechenelly

License Number: 201231716

**3058 Brokerage Administration And Sales Supervision**

**Credit Hours: 40 Hours**

Oregon Certified Continuing Education Provider # 201213655

I affirm that the licensee completed the above named course, I am authorized to provide this information on behalf of the Certified Continuing Education Provider and that it is true and accurate, to the best of my knowledge.

---

**A1 Superior Schools**

Course Hours: 40 Hours

Date: 2/26/2020 | Event Location: Online

**Subject: Oregon Real Estate Principal Broker Application Received Confirmation**

**From: "Oregon Real Estate Agency" <noreply\_rea@rea.state.or.us>**

**Date: Sun, Feb 23, 2020 5:01 pm**

**To: "Eric Zechenelly" <info@willamettehome.com>**

Dear Eric Zechenelly,

The Oregon Real Estate Agency has received your principal real estate broker license application. You may provide a copy of this e-mail to your real estate school as proof that you have submitted your license application to the Agency.

- Your applicant ID number is #201231716. Please keep this number for future use when contacting the Agency.
- Check your application status by logging into your eLicense account at <https://orea.elicense.micropact.com/>. Your license requirements will display under the Application Status tab.
- Agency records show that you must complete the following education from approved course providers to be eligible to take the principal broker license exam (only courses completed on or after January 1, 2013 qualify):
  - The 40-hour Brokerage Administration and Sales Supervision course.course.
- For more information on license requirements, please visit [Principal Broker License Requirements](#).

**IMPORTANT NOTE:** You are NOT actively licensed as a principal broker at this time. You cannot conduct professional real estate activity as a principal broker until you are actively licensed as one.

*Oregon Real Estate Agency*  
530 Center St. NE Ste. 100  
Salem, OR 97301  
(503) 378-4170  
<http://www.oregon.gov/rea>  
[orea.info@state.or.us](mailto:orea.info@state.or.us)

To the Oregon Real Estate Agency,

This letter is supplemental to my request to have the 3 year license requirement waived to apply for a principal broker's license in OR.

I have been in the real estate industry since childhood. My family owns and operates multiple businesses relating to real estate sales, development, finance, property management, development, insurance and leasing. I have been working and performing for these companies since I was in high school as they are all operated out of the same corporate office.

- **Financial Services Unlimited Inc.** is a mortgage finance company originating mortgages for both real and chattel property (Manufactured homes on leased land) in 48 states, now OR, WA, CA, and TX.
- **Financial Service Insurance** is a P & C Insurance agency to insure P & C in OR and WA.
- **Financial Services Properties, & Willamette Equity Group** owns and operates multiple commercial properties in OR. I have been involved in tenant relations and property management. In our family held companies, I have performed due diligence and underwriting for development feasibility. Upon becoming a broker I have completed price opinions and listed WEG's inventory for sale.
- **Willamette Homes** I am responsible for business development that specializes in the affordable housing market. My responsibilities are both wholesale and retail sales activities. Private land development & in park development and existing listing sales in parks within OR and WA is the main scope of our business. This company works in conjunction with privately held finance and insurance companies. With this company, I work with both buyers, sellers, manufactured home park owners and oversee multiple in- house sales agents for the sales of manufactured homes. I also work with local jurisdictions and independent contractors for development permits of new manufactured homes on property. I directly work with Oregon Energy Trust in the replacement and expansion of their affordable housing programs and work with several private held investment firms to redevelop communities. These new homes are either spec development or private sales to consumers. We provide over 20 new houses a year in development of parks, subdivisions and private consumers in addition to the in park listings from Vancouver, WA down to Eugene, OR

The supplemental form "Resume" is a limited resume. This includes my time at DR Horton where I managed 10+ subdivisions and 1,000 lots/homes in OR & WA. My project management role was to supplement the acquisition, due diligence and construction of new land or finished subdivisions from start to finish, with the majority of my projects in North Bethany OR and Vancouver, WA.

In addition, please see the attached file "Diploma" which was awarded to me from Portland State University for the completion of Master Degree in Real Estate Development. We extensively studied

Eric Zechenelly  
OREA Education Waiver Request  
11/2/2020

finance, building construction, policy, developmental, law, and economics. We also performed multiple projects and proposals for developers in OR along with presenting our analysis for King City's expansion plan under the UGB rezoning.

I hope the attached forms and this document show that I have sufficient knowledge and experience in the real estate industry. If more information is needed to approve my request to waive the 3 year requirement, please let me know at the contact information below. As pursuant to ORE 863-014-0042

Eric Zechenelly  
503 662 2946  
[ericzechenelly@gmail.com](mailto:ericzechenelly@gmail.com)

## FINANCIAL SERVICES GROUP OF COMPANIES

---

Oregon Real Estate Board  
530 Center Street NE Suite 100  
Salem, OR 97301

November 9, 2020

### RE: Eric Zechenelly Principal Broker Request

Dear Real Estate Board,

The referenced party has asked me for a letter outlining his professional work experience during his tenure with our group of Companies which supports the affordable housing and commercial real estate markets. As a privately held family group of Companies, Eric has been immersed in the housing and commercial real estate markets while growing up. He has gained invaluable practical business experience ranging from personal property home sales, site development, consumer finance & insurance coordination for homes sales and commercial property management. Please refer to the Exhibit A which summarizes his recent home sales activity with Pacific Homes NW LLC dba Willamette Homes, which is most germane to his Principal Broker request.

Eric's practical business experience and advanced education has created a solid foundation for a professional Real Estate Principal Broker in an ever-evolving real estate industry.

Should you have any questions, please contact me at 503-810-9449.

Sincerely,



Bruce Zechenelly  
President/Managing Member

BAZ/yr

Attachment

Financial Services Insurance, Inc # 100161577 – Financial Services Properties, Inc.  
Financial Services Unlimited, Inc. NMLS #3242 – Pacific Homes NW, LLC dba Willamette  
Homes #MSD 152 – Willamette Equity Group, LLC



10/2/2019-Current

## Real Property Transaction History EXHIBIT "B"

| <b><i>Sold</i></b> |            | <b><i>Current Listing</i></b> |            |
|--------------------|------------|-------------------------------|------------|
| Cornelius          | \$ 430,000 | Beaverton                     | \$ 784,000 |
|                    | \$ 430,000 |                               | \$ 784,000 |

|                    |                   |  |                   |
|--------------------|-------------------|--|-------------------|
| <b>Gross Total</b> | <b>\$ 430,000</b> |  | <b>\$ 784,000</b> |
|--------------------|-------------------|--|-------------------|



# Eric Zechenelly

15013 NW Elaina Ct, Portland  
OR 97229  
(503) 334 7879  
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**Colliers International**, Portland, OR—Internship  
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**Montana State**, Bozeman, MT—*Marketing Focus & Student  
Athlete*  
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## Volunteer

**SOLVE Oregon**

**Little Bobcat Track and  
Field Montana State  
Bozeman, MT**

**Montana Boys and Girls  
Club of America,  
Bozeman, MT**

**CASA Court Appointed  
Foster Advocate  
Portland, OR**

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Oregon

On recommendation of the University Faculty, and by the authority of the State of Oregon, Portland State University hereby confers upon

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the degree of

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with all the rights and privileges appertaining thereto. Given on this Seventeenth Day of August, Two Thousand and Nineteen.

*Gregory S. Munkley*  
President of the Board

*Steph P.*  
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SSN \*\*\*\*\*1478

PSU ID 945829888

Date of Birth: 06-OCT

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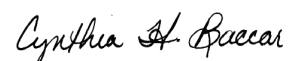
Page: 1

Issued To: Eric Zechenelly  
 Parchment DocumentID: 30518196

| COURSE LEVEL:   | SUBJ NO.                      | COURSE TITLE | CRED GRD | PTS R |
|---|-------------------------------|--------------|----------|-------|
| Graduate  |                               |              |          |       |
| High School: SUNSET HS 13-JUN-2013  |                               |              |          |       |
| First Admit: Fall 2017 Quarter  |                               |              |          |       |
| Last Admit: Spring 2018 Quarter   |                               |              |          |       |
| Current Major(s):   |                               |              |          |       |
| Major : Real Estate Development   |                               |              |          |       |
| Degrees Awarded : Master of Real Estate Devlp 17-AUG-2019   |                               |              |          |       |
| College : The School of Business  |                               |              |          |       |
| Major : Real Estate Development   |                               |              |          |       |
| Institution Information continued:<br>RE 539 REAL ESTATE VALUATION I 4.00 A- 14.68<br>USP 624 DEVELOPMENT PROJECT DESIGN 3.00 B- 8.01<br>Ehrs: 8.00 GPA-Hrs: 7.00 QPts: 22.69 GPA: 3.24 |                               |              |          |       |
| Winter 2019 Quarter   |                               |              |          |       |
| RE 510  | TOP: ECONOMICS & REAL ESTATE  | 1.00 P       | 0.00     |       |
| RE 522  | REAL ESTATE FINANCE II        | 4.00 C+      | 9.32     |       |
| USP 529   | GREEN BUILDINGS I             | 3.00 A-      | 11.01    |       |
| Ehrs: 8.00 GPA-Hrs: 7.00 QPts: 20.33 GPA: 2.90  |                               |              |          |       |
| Spring 2019 Quarter   |                               |              |          |       |
| USP 510   | TOP: REAL ESTATE DEVELOP II   | 3.00 B+      | 9.99     |       |
| USP 527   | DOWNTOWN REVITALIZATION       | 3.00 B+      | 9.99     |       |
| Ehrs: 6.00 GPA-Hrs: 6.00 QPts: 19.98 GPA: 3.33  |                               |              |          |       |
| Summer 2019 Quarter   |                               |              |          |       |
| RE 562  | REAL ESTATE DEVELOP WKSHP     | 4.00 A       | 16.00    |       |
| USP 563   | REAL ESTATE CONSTRUCTION      | 3.00 B+      | 9.99     |       |
| Ehrs: 7.00 GPA-Hrs: 7.00 QPts: 25.99 GPA: 3.71  |                               |              |          |       |
| Last Standing: Grad Good Standing   |                               |              |          |       |
| ***** TRANSCRIPT TOTALS *****   |                               |              |          |       |
| Earned Hrs GPA Hrs Points GPA   |                               |              |          |       |
| TOTAL INSTITUTION 55.00 53.00 178.68 3.37   |                               |              |          |       |
| ***** END OF TRANSCRIPT *****   |                               |              |          |       |
| Fall 2017 Quarter<br>USP 538 REAL ESTATE LAW 3.00 A 12.00<br>USP 612 COMMUNITY, PLANNING, & ETHICS 4.00 A- 14.68<br>Ehrs: 7.00 GPA-Hrs: 7.00 QPts: 26.68 GPA: 3.81                      |                               |              |          |       |
| Winter 2018 Quarter   |                               |              |          |       |
| USP 523   | REAL ESTATE DEV I             | 4.00 B+      | 13.32    |       |
| USP 569   | SUSTAINABLE CITIES & REGIONS  | 4.00 B       | 12.00    |       |
| Ehrs: 8.00 GPA-Hrs: 8.00 QPts: 25.32 GPA: 3.16  |                               |              |          |       |
| Spring 2018 Quarter   |                               |              |          |       |
| RE 521  | REAL ESTATE FINANCE I         | 4.00 A       | 16.00    |       |
| RE 573  | HOUSING ECONOMICS             | 4.00 B-      | 10.68    |       |
| Ehrs: 8.00 GPA-Hrs: 8.00 QPts: 26.68 GPA: 3.33  |                               |              |          |       |
| Summer 2018 Quarter   |                               |              |          |       |
| RE 548  | REAL ESTAT MARKET ANALYSIS    | 3.00 A-      | 11.01    |       |
| Ehrs: 3.00 GPA-Hrs: 3.00 QPts: 11.01 GPA: 3.67  |                               |              |          |       |
| Fall 2018 Quarter   |                               |              |          |       |
| RE 531  | EXEC PERSPECTIVES REAL ESTATE | 1.00 P       | 0.00     |       |
| ***** CONTINUED ON NEXT COLUMN *****  |                               |              |          |       |



This official transcript does not require a raised seal.



Cynthia H. Baccar  
 Registrar  
 Portland State University

# Oregon Real Estate Agency

## OR Principal Broker - State

Zechenelly, Eric  
11950 SW 2nd St #300  
Beaverton, OR 97005  
USA

CANDIDATE ID NUMBER: \*\*\*\*\*1716  
EXAMINATION DATE: 11/02/2020  
CONTROL ID: 500177885  
BOOKING ID: Z9K8Y8MP

Congratulations. You have **passed** this examination. Your score is **42**.  
The passing score is **38**.

| Content Area                          | Your Score | Max Score |
|---------------------------------------|------------|-----------|
| License Law and Disciplinary Measures | 5          | 7         |
| Handling of Clients' Funds            | 3          | 5         |
| Agency Law and Rules                  | 5          | 5         |
| Regulation of Broker Activities       | 7          | 8         |
| Document Handling and Recordkeeping   | 4          | 4         |
| Property Management                   | 4          | 6         |
| Oregon Real Estate Related Statutes   | 14         | 15        |
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# Oregon Real Estate Agency

Real Estate Broker

Score Report



**Eric Zechenelly**

**11950 SW 2nd St #300**

**Beaverton, Oregon 97005**

**Candidate ID: XXX-XX-1716**

**Exam: OR Principal Broker Exam - OR Principal Broker - National**

**Exam Date: 10/01/2020**

---

**PASSING SCORE: 1.0 (75%)**

**YOUR SCORE: 67.0**

**GRADE: PASS**

**Congratulations!** You have passed the **OR Principal Broker - National Examination.**

The following is an analysis of your performance on the examination. For a detailed description of the subject matter included within each Topic, please refer to the PSI Candidate Information Bulletin.

| <b>Topic</b> | <b>Number of Questions</b> | <b>Number Correct</b> |
|--------------|----------------------------|-----------------------|
| Topic 1      | 1                          | 0.0                   |

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4742 Liberty Road S, # 410

Salem OR 97302

## **CONTINUING EDUCATION CERTIFICATE OF COMPLETION**

---

Eric Zechenelly

License Number: 201231716

**3058 Brokerage Administration And Sales Supervision**

**Credit Hours: 40 Hours**

Oregon Certified Continuing Education Provider # 201213655

I affirm that the licensee completed the above named course, I am authorized to provide this information on behalf of the Certified Continuing Education Provider and that it is true and accurate, to the best of my knowledge.

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**A1 Superior Schools**

Course Hours: 40 Hours

Date: 2/26/2020 | Event Location: Online

**Subject: Oregon Real Estate Principal Broker Application Received Confirmation**

**From: "Oregon Real Estate Agency" <noreply\_rea@rea.state.or.us>**

**Date: Sun, Feb 23, 2020 5:01 pm**

**To: "Eric Zechenelly" <info@willamettehome.com>**

Dear Eric Zechenelly,

The Oregon Real Estate Agency has received your principal real estate broker license application. You may provide a copy of this e-mail to your real estate school as proof that you have submitted your license application to the Agency.

- Your applicant ID number is #201231716. Please keep this number for future use when contacting the Agency.
- Check your application status by logging into your eLicense account at <https://orea.elicense.micropact.com/>. Your license requirements will display under the Application Status tab.
- Agency records show that you must complete the following education from approved course providers to be eligible to take the principal broker license exam (only courses completed on or after January 1, 2013 qualify):
  - The 40-hour Brokerage Administration and Sales Supervision course.course.
- For more information on license requirements, please visit [Principal Broker License Requirements](#).

**IMPORTANT NOTE:** You are NOT actively licensed as a principal broker at this time. You cannot conduct professional real estate activity as a principal broker until you are actively licensed as one.

*Oregon Real Estate Agency*  
530 Center St. NE Ste. 100  
Salem, OR 97301  
(503) 378-4170  
<http://www.oregon.gov/rea>  
[orea.info@state.or.us](mailto:orea.info@state.or.us)

# 2020 Giving Guide



HEALTH



ENVIRONMENT



HOUSING



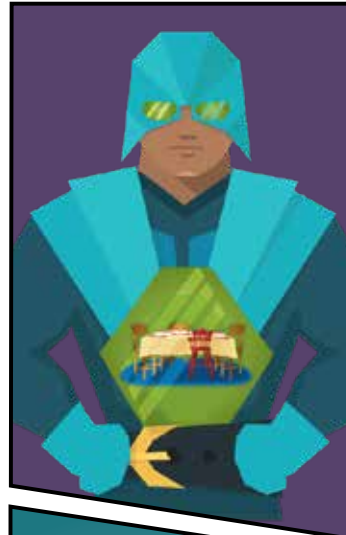
ARTS  
& CULTURE



DIVERSITY,  
EQUITY &  
HUMAN RIGHTS



PETS &  
ANIMALS



FAMILIES



OREGON  
EMPLOYEES  
CHARITABLE  
FUND DRIVE

# CHANGE FOR GOOD



# CFD Categories:

## DIVERSITY, EQUITY & HUMAN RIGHTS

Let your pledge stand for equal rights and opportunity for all. Funds like Black United Fund and MRG Foundation support diversity, work to end inequality and discrimination, and help strengthen connections between people from all cultures and walks of life.

## ARTS & CULTURE

Let your donation help foster creativity, diversity, and beauty in your community. The arts bridge cultural gaps, improve academic performance, strengthen the economy, and define our humanity. By contributing to funds like Work for Art, you can help keep the rich culture of Oregon alive.

## PETS & ANIMALS

Use your pledge to help speak up for those who cannot speak for themselves. Funds like America's Best Local Charities work to end animal cruelty and neglect, encourage no-kill sheltering and pet adoption, and strive for a safe and humane world for all living creatures.

## FAMILIES

Healthy families mean a healthy community. Funds like United Way, Children's Trust Fund, and the Oregon Coalition Against Domestic and Sexual Violence help families and promote positive child development. Invest in Oregon's future generations.

## THE ENVIRONMENT

We can all play a role in global conservation and ecological stewardship. Help protect our environment by giving to funds like EarthShare Oregon, that create sustainable communities, combat environmental health threats, and promote clean energy. Give back to the planet that sustains our lives.

## HOUSING

A home is more than just the sum of its parts—it represents security, stability, and peace of mind. By donating to funds like Habitat for Humanity, you can help reduce homelessness in Oregon, and provide hope to local hard-working families in need.

## HEALTH

Help build a better life for those suffering from disease or illness. Donations to funds like Community Health Charities go toward cure research, advocacy, education, and support to patients and their families. Pledge to help improve the collective health of our community.



**Giving back  
has never  
been easier!**

There's no better time—or easier way—to invest in the charities you care about. The Employees' Charitable Fund Drive is your opportunity to give back to your favorite nonprofits working in Oregon.

Pledge online today to make a payroll contribution or make a one-time credit card or e-check gift. Payroll contribution is budget-friendly, and your gift can be split among as many charities as you wish. If you have given in past years, consider increasing your pledge—even \$1 more per month will have a big impact.

**1**

### **Give online at ECFD.OREGON.GOV**

- 1) Go to *ecfd.oregon.gov* and click on "PLEDGE NOW"
- 2) Click "DONORS PLEASE LOG IN HERE"
- 3) Enter your pledge amount and then select the charities you're passionate about. (Returning donors can repeat their 2019 pledge by clicking "Yes" in the "Replicate Your Last Pledge" box.)
- 4) Find nonprofits to support either by looking at lists under umbrella groups, or click "Search Mode" and type in keywords related to charities that interest you.
- 5) Be sure to SUBMIT your pledge at the bottom—and you're done!

**2**

### **PREFER PAPER? Use the pledge form on the back of this brochure!**

- 1) Select the charities you're passionate about. Look up the specific charity codes by:
  - » Looking them up in this booklet to find the Charitable Fund Drive code numbers for your chosen charities.
  - » Finding charities online by visiting *ecfd.oregon.gov* and clicking "PLEDGE NOW." Then click "MAIN MENU—Charity Search Tool"
- 2) Fill out the pledge form on the back of this brochure. Be sure to sign it and keep a copy for your records.
- 3) Scan your completed pledge form, and email it to your office's Charitable Fund Drive Coordinator.

**Thank you for investing  
in our community!**

# Listings of Organizations

## grouped by funds & federations

### Local Funds & Federations

- 1500 Greater Douglas United Way**  
(541) 672-1734  
[www.gduway.org](http://www.gduway.org)  
[gduway@gduway.org](mailto:gduway@gduway.org)
- 1501 Adapt Youth Prevention
- 1502 American Red Cross, Oregon Pacific Chapter, Umpqua District
- 1503 Battered Persons' Advocacy
- 1504 Camp Fire USA, Wilani Council
- 1505 Compassionate Friends
- 1506 Douglas C.A.R.E.S.
- 1507 Douglas Resident Training Facility
- 1508 Family Development Center
- 1509 FISH of Douglas County
- 1511 Friendly Kitchen
- 1512 Girl Scouts, Western Rivers Council
- 1514 Legal Aid Services of Oregon
- 1517 Options Counseling
- 1518 Phoenix School of Roseburg
- 1519 Project Literacy
- 1520 Salvation Army, Roseburg Corp Center
- 1522 Southern Oregon Regional Brokerage
- 1523 St. Francis Community Kitchen
- 1525 Sutherlin Community Resource Center
- 1527 UCAN Food Shares
- 1528 UCAN Housing and Homeless Assistance Program
- 1530 Umpqua Homes for the Handicapped
- 1531 Umpqua Valley disAbilities Network
- 1532 YMCA of Douglas County
- 1534 Neighbor to Neighbor
- 3800 Habitat for Humanity of Oregon
- 2600 Tillamook County United Way**  
(503) 812-8270  
[www.tillamookcountyunitedway.org](http://www.tillamookcountyunitedway.org)  
[tcuw@tillamookcountyunitedway.org](mailto:tcuw@tillamookcountyunitedway.org)
- 2603 CARE - Community Action Resources Enterprises, Inc.
- 2604 CASA - Court Appointed Special Advocates
- 2606 Faith In Action
- 2607 Head Start Program, Community Action Team
- 2608 Healthy Start - Community Action Resource Enterprises
- 2609 Marie Mills Center, Inc.
- 2610 Meals For Seniors
- 2611 Salvation Army, Tillamook
- 2613 Tillamook Early Learning Center
- 2614 Tillamook Bay Literacy Program
- 2615 Tillamook County Food Bank, Inc.
- 2617 YMCA - Young Mens' Christian Association
- 2618 TC UW - Tillamook County United Way, Inc.
- 2619 Tides of Change
- 2800 United Way of the Blue Mountains**  
(541) 276-2661  
[www.uwblutmt.org](http://www.uwblutmt.org)  
[info@uwbluemt.org](mailto:info@uwbluemt.org)
- 2805 Campus Life / Youth for Christ - Blue Mtn
- 2806 Domestic Violence Services
- 2807 Eastern Oregon Alcoholism Foundation
- 2808 Foster Grandparent Program
- 2812 Lost and Found Youth Outreach
- 2816 The Salvation Army Pendleton
- 2822 Stanfield Food Basket
- 2824 SMART Reading
- 2825 Outreach Food Pantry & Thrift Store
- 2826 Senior Companion Program
- 2827 Boy Scouts - Blue Mountains Council
- 2828 CASA of Eastern Oregon
- 2829 Elgin Food Bank

- 2830 MayDay
- 2831 Mt. Emily Safe Center
- 2832 Neighbors Together
- 2833 Shelter from the Storm
- 2834 Baker County Salvation Army
- 2835 Union County Search & Rescue

**1900 United Way of Central Oregon**  
*(541) 389-6507*  
[www.deschutesunitedway.org](http://www.deschutesunitedway.org)  
[kati@deschutesunitedway.org](mailto:kati@deschutesunitedway.org)

- 1903 Bethlehem Inn
- 1904 Boys and Girls Clubs of Bend
- 1905 Campfire of Central Oregon
- 1907 Central Oregon Council on Aging (COCOA)
- 1908 Family Resource Center (FRC)
- 1910 CASA of Central Oregon
- 1914 Healthy Beginnings
- 1918 KIDS Center
- 1919 Latino Community Association (LCA)
- 1920 MountainStar Family Relief Nursery
- 1921 NeighborImpact
- 1924 Saving Grace
- 1930 Healing Reins Therapeutic Riding Center
- 1931 Heart of Oregon Corps
- 1934 Friends of the Children Central Oregon
- 1935 211 Info Central Oregon
- 1936 Bend Methodist Church Back Door Cafe
- 1937 Metropolitan Family Services (Cash Oregon) - TaxAide
- 1938 Central Oregon Veterans Ranch
- 1939 J Bar J - Big Brothers Big Sisters of Central Oregon
- 1940 J Bar J - Cascade Youth & Family Center
- 1941 J Bar J - Grandma`s House
- 1942 La Pine Community Kitchen
- 1943 SMART Oregons Children Foundation
- 1944 Thrive Central Oregon

**700 United Way of Clatsop County**  
*(503) 325-1961*  
[www.clatsopunitedway.org](http://www.clatsopunitedway.org)  
[uwccdirector@pacifier.com](mailto:uwccdirector@pacifier.com)

- 702 Camp Kiwanilong
- 703 Clatsop CASA Program
- 704 Clatsop Community Action
- 705 Hope House
- 706 The Healing Circle (VOCA) Victory Over Child Abuse
- 707 The Lighthouse for Kids
- 708 Lives in Transition
- 711 The Harbor
- 714 BSA Scouting, Fort Clatsop District
- 715 Astoria Armory Community Center
- 716 Columbia Senior Diners
- 717 SMART (Start Making a Reader Today) Reading Program
- 718 Helping Hands Re-entry Programs

**1700 United Way of Columbia County**  
*(503) 556-3614*  
[www.unitedwayofcolumbiacounty.com](http://www.unitedwayofcolumbiacounty.com)  
[uwcc@hotmail.com](mailto:uwcc@hotmail.com)

- 1703 Columbia Pacific Food Bank
- 1707 Community Action Team, Homeless Prevention/Rapid Rehousing
- 1708 Emergency Support Shelter
- 1709 Community Action Team, Energy Services
- 1713 Community Action Team, Respite
- 1714 Community Action Team, Parenting Education
- 1715 Progress Center
- 1719 Turning Point Community Services Center
- 1720 Vernonia Cares Food Bank
- 1721 SAFE of Columbia County
- 1722 Community Action Team, Veterans Services

**2700 United Way of the Columbia Gorge***(541) 386-6100**[www.unitedwaycolumbiagorge.net](http://www.unitedwaycolumbiagorge.net)**[unitedway@gorge.net](mailto:unitedway@gorge.net)*

- 2703 CASA, Columbia Gorge
- 2704 Columbia Gorge Children's Advocacy Center
- 2707 FISH Food Bank
- 2708 HAVEN
- 2709 Helping Hands Against Violence
- 2742 SMART
- 2751 Columbia Gorge Peace Village
- 2761 YES
- 2762 Mid-Columbia Children's Council, INC.
- 2764 Hood River Senior Center Meals on Wheels
- 2765 Hood River Shelter Services
- 2766 Mid Columbia Action Council
- 2769 The Dalles Meals on Wheels, Inc.
- 2770 Skamania Co. Council on Domestic Violence
- 2771 Oregon Trail Transitional Housing
- 2772 Klickitat County Senior Services
- 2773 Hood River County Veteran Service Office
- 2774 Special Oympics The Gorge
- 2775 Skamania County Senior Services

**1000 United Way of Jackson County, Inc.***(541) 773-5339**[www.unitedwayofjacksoncounty.org](http://www.unitedwayofjacksoncounty.org)**[deeanne@unitedwayofjacksoncounty.org](mailto:deeanne@unitedwayofjacksoncounty.org)*

- 1001 UWJC - Education
- 1002 UWJC - Income
- 1003 UWJC - Health
- 1004 UWJC - Transportation
- 1005 UWJC - WiLL (Women Living Leadership) Fund
- 1006 Addictions Recovery Center, Inc.
- 1008 The Arc Jackson County
- 1009 Ashland Family YMCA
- 1010 Ashland Supportive Housing
- 1013 CASA of Jackson County, Inc.
- 1014 Center for Non-Profit Legal Services
- 1017 Community Works
- 1018 Consumer Credit Counseling Service of Southern Oregon
- 1021 The Family Nurturing Center

- 1022 Food & Friends, Rogue Valley Council of Governments
- 1026 Jackson County SART (Sexual Assault Response Team)
- 1028 Kids Unlimited
- 1029 Living Opportunities
- 1034 Rogue Valley Family YMCA
- 1036 Roots & Wings Child Development
- 1037 Rogue Valley Mentoring
- 1039 Head Start - Southern Oregon Child & Family Council
- 1044 UWJC - HOPE Chest
- 1045 Childrens Advocacy Center of Jackson County
- 1052 Community Volunteer Network
- 1054 Hearts with a Mission
- 1055 Hope Equestrian Center
- 1058 Compass House
- 1060 Resolve
- 1066 Rogue Retreat
- 1071 Asante Foundation
- 1072 Compassion Highway Project
- 1073 La Clinica del Valle
- 1074 OnTrack Rogue Valley
- 1075 Phoenix Counseling Center
- 1076 United Way of Jackson County (UWJC)
- 1077 Max's Mission

**1200 United Way of the Klamath Basin***(541) 882-5558**[www.unitedwayoftheklamathbasin.org](http://www.unitedwayoftheklamathbasin.org)**[uwkb@unitedwayoftheklamathbasin.org](mailto:uwkb@unitedwayoftheklamathbasin.org)*

- 1203 CASA for Children of Klamath County
- 1205 Citizens for Safe Schools
- 1207 Foster Grandparents Program
- 1208 Friends of the Children of Klamath County
- 1209 Girl Scouts of Oregon and SW Washington
- 1210 Integral Youth Services
- 1212 Klamath & Lake County Food Bank
- 1214 Klamath Basin Senior Citizens Center
- 1215 Klamath Crisis Center, Marta's House
- 1216 Klamath Falls Gospel Mission
- 1217 Klamath Hospice
- 1218 Klamath KID Center
- 1219 Lutheran Community Services

- 1220 The Salvation Army
- 1221 Spokes Unlimited
- 1222 YMCA of Klamath County
- 1223 Crater Lake Council Boy Scouts of America

**2200 United Way of Lane County**

*(541) 357-5713*  
[www.unitedwaylane.org](http://www.unitedwaylane.org)  
[ahesus@unitedwaylane.org](mailto:ahesus@unitedwaylane.org)

- 2206 Centro LatinoAmericano
- 2207 Community Sharing Program
- 2208 Direction Services
- 2212 FOOD for Lane County
- 2215 HIV Alliance - Eugene
- 2216 Junction City Local Aid
- 2219 Looking Glass Youth & Family Services
- 2222 Pearl Buck Center, Inc.
- 2224 Relief Nursery
- 2229 ShelterCare
- 2235 St. Vincent de Paul Society of Lane County
- 2236 Upper Willamette Community Development Corporation
- 2237 Volunteers In Medicine
- 2238 White Bird Clinic
- 2252 OSLC Developments, Inc.
- 2253 CASA of Lane County
- 2254 Cornerstone Community Housing
- 2255 Huerto de la Familia
- 2256 Mapleton Food Share
- 2278 Oregon Family Support Network
- 2279 Daisy CHAIN
- 2280 Homes for Good
- 2281 Youth Era
- 2282 Mapleton School District
- 2283 Ophelia's Place
- 2284 15th Night

**600 United Way of Linn, Benton, & Lincoln Counties**

*(541) 757-7717*  
[www.unitedwayblc.org](http://www.unitedwayblc.org)  
[office@unitedwayblc.org](mailto:office@unitedwayblc.org)

- 601 Samaritan Health Services - InReach Services
- 604 Boys & Girls Club of Albany

- 605 Boys & Girls Club the Greater Santiam
- 606 CASA of Linn County
- 607 Center Against Rape & Domestic Violence - Linn Benton
- 609 Community Outreach
- 610 Family Tree Relief Nursery
- 611 Fish of Albany
- 612 Girl Scouts of Oregon & Southwest Washington
- 614 Mid-Willamette Family YMCA
- 615 Mighty Oaks Children's Therapy Center
- 620 Scio Youth Club
- 621 Sharing Hands
- 623 Sweet Home Emergency Ministries
- 626 Volunteer Caregivers
- 627 Furniture Share
- 630 Central Linn Recreation Association
- 631 Old Mill Center for Children & Families
- 632 Philomath Community Services
- 633 Philomath Youth Activities Club
- 635 Strengthening Rural Families
- 636 Vina Moses Center
- 637 Yachats Youth & Family Activities Program
- 638 ABC House
- 639 We Care
- 640 Casa Latinos Unidos de Benton County
- 642 South Corvallis Food Bank
- 643 Newport Food Pantry
- 645 Youth Development Coalition of Lincoln County
- 646 Boy Scouts of America, Cascade Pacific Council, Calapooia District
- 647 Boys & Girls Club of Corvallis
- 648 CASA of Benton County
- 649 CASA of Lincoln & Tillamook Counties
- 650 Coastal Range Food Bank, Inc
- 651 Corvallis Day Time Drop In
- 652 Corvallis Environmental Center
- 653 First United Methodist Church of Corvallis - Room at the Inn
- 654 Corvallis Housing First
- 657 First Christian Pre-Primary School
- 660 Jackson Street Youth Services
- 662 Stone Soup Corvallis
- 663 The Community Before & After School Child Care (CAP)
- 664 Centro de Ayuda

665 Children's Advocacy Center of Lincoln County  
 666 Corvallis Public Schools Foundation  
 667 Grace Center for Adult Day Services  
 668 Lincoln City Warming Shelter  
 669 Obria - Healthy Moms Safe Babies  
 670 Oregon Cascades West Council of Governments - Senior Services Foundation  
 671 Unitarian Universalist Fellowship of Corvallis - Corvallis Men's Shelter

**1600 United Way of the Mid-Willamette Valley**

*(503) 363-1651*  
[www.unitedwaymwv.org](http://www.unitedwaymwv.org)  
[liveunited@unitedwaymwv.org](mailto:liveunited@unitedwaymwv.org)

1606 Boys & Girls Club of Salem, Marion & Polk Counties  
 1607 CASA of Marion County  
 1608 CASA of Yamhill County, Inc  
 1609 Catholic Community Services of the Mid-Willamette Valley and Central Coast  
 1616 Garten Services, Inc  
 1619 Helping Hands Resources  
 1620 Center for Hope and Safety  
 1623 Lutheran Community Services Northwest  
 1629 Mid-Willamette Valley Community Action Agency  
 1631 Northwest Human Services  
 1637 St. Francis Shelter  
 1643 Yamhill Community Action Partnership (YCAP)  
 1651 Helping Hands Christian Community Outreach Centers  
 1657 Bridgeway Recovery Services, Inc.  
 1661 Head Start of Yamhill County  
 1663 Oregon Pacific Area Health Education Center  
 1664 Family Promise  
 1665 Salvation Army of Marion and Polk Counties  
 1666 Stayton Community Food Bank  
 1668 CASA of Polk County  
 1669 Community Innovation Fund  
 1671 Liberty House  
 1673 Women United Fund  
 1674 Salem Keizer NAACP  
 1675 Oregon Black Pioneers  
 1676 Juliettes House

1677 Love Inc  
 1678 5Rock Ranch  
 1680 McMinnville Free Clinic  
 1681 Salem Free Clinics  
 1682 Partnerships in Community Living  
 1683 Shangri-La  
 1684 Salem Family YMCA  
 1685 Mid-Valley Wildfire Relief Fund

**2000 United Way of Southwestern Oregon**

*(541) 267-5202*  
[www.unitedwayswo.org](http://www.unitedwayswo.org)  
[director@unitedwayswo.org](mailto:director@unitedwayswo.org)

2001 Bandon Community Youth Center  
 2002 Coastline Neighbors, Inc  
 2003 Coos Bay Downtown Foundation  
 2004 Coos Bay Public Library Foundation  
 2007 Coos County Friends of Public Health  
 2009 Curry County 4-H Association  
 2010 Gold Beach Senior Center  
 2012 The Devereux Center  
 2016 Star of Hope  
 2020 Friends Inspiring Reading Success Together  
 2021 Consumer Credit Counseling Services, Inc  
 2023 Myrtle Point Food Share  
 2024 Coos County Youth Sports  
 2025 CASA of Coos County

### 3700 **America's Best Local Charities**

(415) 925-2663

[www.best-charities.org](http://www.best-charities.org)

[campaigns@best-charities.org](mailto:campaigns@best-charities.org)

- |      |  |       |  |
|------|--|-------|--|
| 3702 | Canine Angels Service Teams                              | 3762  | Farmers Market Fund  |
| 3703 | Cat Adoption Team  | 3763  | Forward Stride   |
| 3704 | CASA of Clackamas County                                 | 3764  | Friendly House, Inc.   |
| 3706 | National Crime Victim Law Institute                      | 3765  | HIV Alliance   |
| 3707 | De Paul Treatment Centers                                | 3766  | Lawyers' Campaign for Equal Justice                              |
| 3708 | Dogs for Better Lives (formerly Dogs for the Deaf)       | 3767  | New Avenues for Youth, Inc.                                      |
| 3710 | Greenhill Humane Society                                 | 3768  | Old Mill Center For Children And Families Inc.                   |
| 3713 | Operation Homefront - Pacific Northwest                  | 3769  | Orchestra Next   |
| 3714 | Oregon Humane Society                                    | 3770  | Oregon Dachshund Rescue, Inc.                                    |
| 3717 | Rowena Wildlife Clinic                                   | 3771  | Oregon Food Bank   |
| 3718 | Saturday Academy   | 3772  | Oregon Office of Student Access and Completion                   |
| 3720 | Wild Salmon Center                                       | 3773  | Oregon Public Broadcasting                                       |
| 3721 | Willamette Humane Society                                | 3775  | Our House of Portland, Inc.                                      |
| 3723 | Brain Injury Association of Oregon                       | 3776  | Outside In   |
| 3728 | Salem Friends of Felines                                 | 3777  | p:ear  |
| 3729 | Support Our Troops Inc. - Oregon Chapter                 | 3778  | Partners For A Hunger-Free Oregon                                |
| 3730 | Sustainable Northwest                                    | 3779  | PFLAG Portland   |
| 3732 | Farmers Ending Hunger                                    | 3780  | PHAME Academy  |
| 3734 | SafeHaven Humane Society                                 | 3781  | Planned Parenthood of Columbia-Willamette                        |
| 3736 | Sunshine Division Inc                                    | 3782  | Planned Parenthood of Southwestern Oregon                        |
| 3738 | Feral Cat Coalition of Oregon                            | 3783  | Portland Gay Mens Chorus Inc                                     |
| 3739 | Heartland Humane Society                                 | 3784  | Pride Foundation   |
| 3740 | Shelly's House, Inc.                                     | 3785  | Q Center-Portland  |
| 3741 | Sponsors Inc.  | 3786  | SAGE Metro Portland  |
| 3742 | Talking Book and Braille Services - Oregon State Library | 3787  | Salem Keizer Coalition for Equality                              |
| 3743 | Zebs Wish Equine Sanctuary                               | 3788  | Sisters of the Road Cafe   |
| 3744 | Boys & Girls Club of Western Treasure Valley             | 3790  | Harmony New Beginnings Animal Rescue                             |
| 3747 | Folk-Time, Inc.  | 3791  | Meals On Wheels People, Inc.                                     |
| 3749 | Marion-Polk Food Share, Inc.                             | 3792  | Raphael House  |
| 3750 | Returning Veterans Project                               | 3793  | ABC House Inc  |
| 3751 | Turtle Ridge Wildlife Center                             | 3794  | Causa of Oregon  |
| 3752 | Community Transitional School                            | 3796  | Children's Educational Theatre                                   |
| 3755 | Oregon State Capitol Foundation                          | 3797  | Hand in Hand Farm Inc  |
| 3756 | ACLU Foundation of Oregon                                | 3798  | House of Dreams  |
| 3757 | Basic Rights Education Fund                              | 3799  | Keep Oregon Green Association                                    |
| 3758 | Bradley Angle  | 37001 | ASPCA: American Society for the Prevention of Cruelty to Animals |
|      |  | 37002 | Autistic Community Activity Program Inc                          |
|      |  | 37003 | Carpe Mundi  |



37004 Correctional Peace Officers Foundation  
 37005 Disabled American Veterans (DAV) Charitable Service Trust  
 37006 Fisher House Foundation Inc.  
 37007 Gary Sinise Foundation  
 37008 Pride Northwest Inc  
 37009 Shriners Hospitals for Children - Portland  
 37991 Ride Connection Inc

**100 Black United Fund of Oregon**

*(503) 282-7973 ext 101*  
[www.bufor.org](http://www.bufor.org)  
[mlfoster@bufor.org](mailto:mlfoster@bufor.org)

156 Building Blocks 2 Success  
 165 Elevate Oregon  
 168 Blueprint Foundation  
 171 KBOO Community Radio  
 172 Momentum Alliance  
 174 Chess for Success  
 175 Coalition of Black Men  
 176 Constructing Hope Pre-Apprenticeship Program  
 177 Downtown Languages  
 178 Race Talks (fiscally sponsored by World Arts Foundation)  
 179 Salem Multi Institute (World Beat)  
 181 Zeta Phi Beta Sorority, Inc.  
 182 BEAM (Black Educational Achievement Movement)

**400 Community Health Charities**

*(800) 654-0845*  
[www.healthcharities.org](http://www.healthcharities.org)  
[info@healthcharities.org](mailto:info@healthcharities.org)

401 ALS Association of Ore. & SW Washington  
 403 American Cancer Society, Portland, Oregon  
 404 American Diabetes Association-Oregon  
 405 American Heart Association, Western States Affiliate  
 406 American Lung Association in Oregon  
 407 Arthritis Foundation, Great West Region, Oregon  
 409 Children's Cancer Association  
 412 Crohn's & Colitis Foundation, Northwest Chapter, Oregon  
 413 Cystic Fibrosis Foundation-OR Chapter  
 414 Epilepsy Foundation, Oregon  
 415 Fanconi Anemia Research Fund  
 416 JDRF International, Oregon and SW Washington Chapter

417 Leukemia & Lymphoma Society, Oregon SW Washington  
 Idaho Montana Chapter  
 419 March of Dimes, Greater Portland and Southwest  
 Washington  
 421 NAMI (National Alliance on Mental Illness), Oregon  
 422 National Multiple Sclerosis Society, Oregon  
 423 National Psoriasis Foundation  
 425 Pancreatic Cancer Action Network  
 427 St. Jude Children's Research Hospital (serving Oregon)  
 428 Susan G. Komen for the Cure, Oregon and SW Washington  
 429 Be The Match Foundation  
 434 Albertina Kerr Centers Foundation  
 435 Muscular Dystrophy Association, Portland OR  
 436 ZERO - The End of Prostate Cancer  
 437 Alzheimer's Association, Oregon Chapter, Portland  
 439 Changing Lives through Literacy - Child Aid

**200 EarthShare Oregon**

*(800) 875-3863*  
[www.earthshare.org/earthshare-oregon/](http://www.earthshare.org/earthshare-oregon/)  
[info@earthshare-oregon.org](mailto:info@earthshare-oregon.org)

201 1000 Friends of Oregon  
 203 American Forests  
 204 Portland Audubon (Audubon Society of Portland)  
 205 Bat Conservation International  
 206 Beyond Pesticides  
 207 The Street Trust (Bicycle Transportation Alliance)  
 208 BRING Recycling  
 210 Columbia Riverkeeper  
 213 Defenders of Wildlife  
 216 Environmental Law Institute  
 219 The Freshwater Trust  
 220 Friends of the Columbia Gorge  
 221 Friends of Trees  
 222 Greenbelt Land Trust, Inc.  
 223 Greater Hells Canyon Council  
 226 National Parks Conservation Association  
 227 National Wildlife Federation  
 229 The Nature Conservancy in Oregon  
 230 Northwest Center for Alternatives to Pesticides  
 231 EcoChallenge (Northwest Earth Institute)  
 232 Opal Creek Ancient Forest Center

236 Oregon Wild  
 240 Recycling Advocates  
 243 Sierra Club Foundation, Oregon Chapter  
 244 Klamath-Siskiyou Wildlands Center  
 246 Surfrider Foundation  
 248 Tualatin Riverkeepers  
 249 WaterWatch of Oregon  
 250 Wetlands Conservancy  
 251 Willamette Riverkeeper  
 252 World Wildlife Fund  
 255 The Peregrine Fund  
 256 Beyond Toxics  
 260 Institute for Applied Ecology  
 262 McKenzie River Trust  
 266 Union of Concerned Scientists  
 267 Environmental & Energy Study Institute  
 269 Friends of Outdoor School  
 271 Izaak Walton League of America  
 272 Oregon Physicians for Social Responsibility  
 274 Scenic America  
 275 SOLVE  
 276 Ocean Conservancy  
 277 Oceana  
 278 American Farmland Trust  
 279 Community Cycling Center  
 280 Oregon Parks Forever (formerly Oregon State Parks Foundation)

**3800 Habitat for Humanity of Oregon**

*(503) 206-5248  
 www.habitatoregon.org  
 megan@habitatoregon.org*

3801 Albany Area Habitat for Humanity  
 3802 Bend Area Habitat for Humanity  
 3803 Benton County Habitat for Humanity  
 3804 Coos County Habitat for Humanity  
 3807 Florence Habitat for Humanity  
 3808 Grande Ronde Valley Habitat for Humanity  
 3809 Junction City/Harrisburg/Monroe Habitat for Humanity  
 3811 Lebanon Area Habitat for Humanity  
 3812 Lincoln County Habitat for Humanity  
 3813 McMinnville Area Habitat for Humanity

3815 Mid-Willamette Valley Habitat for Humanity  
 3816 Newberg Area Habitat for Humanity  
 3817 Habitat for Humanity of La Pine Sunriver  
 3818 North Willamette Valley Habitat for Humanity  
 3820 Habitat for Humanity Portland Metro/East  
 3822 Rogue Valley Area Habitat for Humanity  
 3823 Sisters Habitat for Humanity  
 3824 Habitat for Humanity of Central Lane  
 3825 Columbia Gorge Habitat for Humanity  
 3826 Tillamook County Habitat for Humanity  
 3827 Umpqua Valley Habitat for Humanity  
 3828 West Tuality Habitat for Humanity  
 3829 Willamette West Habitat for Humanity  
 3830 Columbia County Habitat for Humanity  
 3831 Grants Pass Area Habitat for Humanity  
 3832 Jefferson County Habitat for Humanity

**4100 MRG Foundation**

*(503) 289-1517  
 www.mrgfoundation.org  
 info@mrgf.org*

4131 Red Lodge Transition Services  
 4169 Disability Art and Culture Project  
 4185 Unidos Bridging Community  
 41001 Don't Shoot Portland  
 41002 Eugene/Springfield NAACP  
 41003 Latinos Unidos Siempre  
 41004 Right 2 Survive  
 41005 Rogue Climate  
 41006 Unite Oregon Rogue Valley

**4400 Oregon Coalition Against Domestic and Sexual Violence**

*(503) 230-1951  
 www.ocadsv.org  
 info@ocadsv.org*

4401 Battered Persons Advocacy  
 4403 Canyon Crisis Center  
 4404 Center Against Rape & Domestic Violence  
 4405 Clackamas Women's Services  
 4406 The Harbor (formerly Clatsop County Women's Resource Center)  
 4407 Safe of Columbia County (formerly Columbia County Women's Resource Center)

4408 Community Works - Dunn House/Sexual Assault Support Services

4409 Domestic Violence Resource Center

4411 Ecumenical Ministry of Oregon-Russian Oregon Social Services-Domestic Violence Services

4412 Harney Helping Organization for Personal Emergencies

4413 HAVEN from Domestic Violence

4414 Heart of Grant County

4415 Helping Hands Against Violence, Inc.

4416 Henderson House

4417 Illinois Valley Safe House Alliance

4418 Immigrant & Refugee Community Organization-Refugee and Immigrant Family Strengthening

4419 Impact NW - Listen to Kids

4420 Klamath Crisis Center/Marta's House

4421 Lake County Crisis Center

4423 MayDay, Inc.

4424 My Sister's Place

4425 New Beginnings Intervention Center

4426 Oasis Shelter Inc.

4427 Call to Safety

4428 Project DOVE

4429 Raphael House of Portland

4430 S.A.B.L.E. House

4432 Salvation Army-West Women's & Children's Shelter

4434 Self Enhancement Inc.

4435 Sexual Assault Support Services

4437 Siuslaw Outreach Services

4439 Tillamook County Women's Resource Center

4442 Volunteers of America, Home Free

4443 Women's Crisis Support Team

4445 Womenspace

4446 YWCA's Domestic Violence Services

4447 Confederated Tribes of Siletz - CARE Program

4448 Jackson County Sexual Assault Response Team (SART)

4449 Northwest Family Services - Casa Esperanza

4450 Survivor Collective Alliance, Reaching Society (SCARS)

4451 The SAFE Project

4452 Warm Springs Reservation - Victims of Crime Services

4453 Center for Hope & Safety

4454 Gateway Center

**300 Our Children Oregon**

*(formerly Childrens Trust Fund of Oregon)*

*(503) 236-9754*

*www.ctfo.org*

*chris@ctfo.org*

301 Parenting Now! (formerly Birth To Three)

302 Building Healthy Families/ Parent Education

304 Children's Relief Nursery - A Program of Lifeworks NW

305 Child & Family Development Programs of Community Action Team

307 Families First Parent Resource Center/Parents As Teachers

308 Family Resource Center of Central Oregon

312 Impact NW/Early Childhood Fathering

314 Metropolitan Family Service/Parent Ed for High Risk Families

317 Parents Anonymous/Morrison Child & Family Services

318 Mountain Star Family Relief Nursery

319 Next Door, Inc. (The)/New Parent Services

320 Oregon Coast Community Action/Great Afternoons

323 Pearl Buck Center Inc./FINDing Our Strength

324 Pioneer Relief Nursery

327 Self Enhancement, Inc./Parent Support Group

329 Family Relief Nursery

330 SW Oregon Community College/Positive Parenting

331 Treasure Valley Children's Relief Nursery

332 Virginia Garcia Memorial Fdn/Padres Con Iniciativa

333 Volunteers of America Family Relief Nursery

340 Family Building Blocks

342 Family Nurturing Center, Jackson Co Children's Relief Nursery

345 Klamath-Lake CARES/Period of PURPLE Crying

348 Native American Youth & Family Center/Positive Indian Parenting

350 Old Mill Center Relief Nursery

352 Relief Nursery Inc.

353 Silverton Together/Parent Education

354 Strengthening Rural Families/Promise Project

356 A Family Place: Emerging Relief Nursery

357 South Coast Family Harbor: Emerging Relief Nursery

358 Black Parent Initiative

359 Hacienda CDC

360 Janus Youth Programs

- 361 Linn-Benton Community College, Parenting Education Department
- 362 South Lane Mental Health
- 3900 Regional Arts & Culture Council**  
*(503) 823-2969*  
[www.artsimpactfund.racc.org](http://www.artsimpactfund.racc.org)  
[whovey@racc.org](mailto:whovey@racc.org)
- 3902 Artists Repertory Theatre
- 3903 Blue Sky Gallery
- 3904 BodyVox Dance
- 3905 Broadway Rose Theatre Company
- 3906 Cappella Romana
- 3907 Chamber Music Northwest
- 3908 Children's Healing Art Project
- 3909 Portland Columbia Symphony Orchestra
- 3910 Echo Theater Company
- 3911 Ethos Music Center
- 3912 Hollywood Theatre
- 3913 Friends Of Chamber Music
- 3914 Imago Theatre
- 3915 Lakewood Center for the Arts
- 3916 Literary Arts
- 3917 Live Wire! Radio
- 3918 Metropolitan Youth Symphony
- 3919 Milagro Theatre
- 3920 Northwest Children's Theater and School
- 3921 Northwest Dance Project
- 3922 Oregon Ballet Theatre
- 3923 Oregon Children's Theatre
- 3925 Oregon Symphony
- 3926 PlayWrite
- 3927 Portland Art Museum
- 3928 The Portland Ballet
- 3929 Portland Baroque Orchestra
- 3930 Portland Center Stage
- 3932 Portland Gay Men's Chorus
- 3933 Portland Institute for Contemporary Art
- 3934 Portland Opera
- 3935 Portland Piano International
- 3937 Portland Youth Philharmonic
- 3938 Profile Theatre Project
- 3939 The Right Brain Initiative
- 3941 Third Angle New Music Ensemble
- 3942 Third Rail Repertory Theatre
- 3943 White Bird Dance
- 3944 Write Around Portland
- 3945 Young Audiences of Oregon & SW Washington
- 3946 Bag & Baggage Productions
- 3947 PHAME
- 3948 Independent Publishing Resource Center
- 3949 NW Documentary Arts & Media
- 3951 Disjecta Contemporary Art Center
- 3952 PDX Jazz
- 3954 Hand2Mouth Theatre
- 3955 Triangle Productions!
- 3956 Portland Playhouse
- 3957 The Circus Project
- 3958 August Wilson Red Door Project
- 3959 CoHo Productions
- 3960 My Voice Music
- 3961 Oregon Bravo Youth Orchestras
- 3962 Polaris Dance Theater
- 3963 Boom Arts
- 3964 Northwest Film Center
- 3965 Portland Experimental Theatre Ensemble
- 3966 Rock-n-Roll Camp for Girls



**REAL ESTATE BOARD  
REGULATION DIVISION REPORT  
December 7, 2020**

Regulation Division Manager: Vacant  
Compliance Specialists 3 (Compliance Coordinator): Rob Pierce, Meghan Lewis (WOC)  
Financial Investigators (Investigator-Auditor): Jeremy Brooks, Aaron Grimes,  
 Liz Hayes (WOC), Lisa Montellano, Cidia Nañez, Lindsey Nunes, John Moore, Frances  
 Hlawatsch (Temporary)  
Compliance Specialist 2: Carolyn Kalb

**Division Overview**

The Agency receives complaints and determines if an investigation is warranted. Open cases are assigned to investigators to gather facts (from interviews and documents), prepare a detailed written report and submit for Administrative Review. The Compliance Coordinators conducting the Administrative Review work evaluate whether the evidence supports charging a person with a violation of Agency statutes or administrative rules. When a case is found to have sufficient cause to sanction a license, the case is elevated to the Commissioner for review. When a sanction is supported by the Commissioner, the Compliance Coordinators conduct a settlement conferences to resolve cases without a contested case hearing. If a hearing is requested, the Investigator works with the Assistant Attorney General in preparing for and presenting the case at hearing.

**Personnel**

The Regulations Division Manager position remains vacant. Deputy Commissioner Higley is acting in the manager role with Commissioner Strode overseeing Administrative Actions.

The Agency expects to recruit for the management position in the spring.

**Workload and Activity Indicators**

| <u>Average # in this Status at the time</u> | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> | <u>2019</u> | <u>2020</u> | <u>Current 11/30/20</u> |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------------|
| Complaint                                   | 40          | 44          | 33          | 25          | 20          | 26          | 19          | 16                      |
| Pending Assignment                          | 3           | 4           | 24          | 16          | 26          | 39          | N/A***      | 0                       |
| Investigation                               | 47          | 52          | 49          | 50          | 38          | 48          | 76****      | 64***                   |
| (# of Investigators)                        | 6           | 7           | 7           | 7           | 7*          | 6-7**       | 7           | 8                       |
| Admin Review                                | 27          | 33          | 28          | 40          | 35          | 61          | 21          | 4                       |

\* One investigator on medical leave.  
 \*\* One investigator on medical leave, then retired. Late 2019 vacancy was filled.  
 \*\*\*Pending queue retired. All cases are directly assigned to an investigator rather than being held in a pending status.  
 \*\*\*\*Increase in average is not reflective of an increased caseload. All pending assignment cases were assigned.

ADMINISTRATIVE ACTIONS  
Reported  
9/17/2020 through 11/10/2020

**REVOCATIONS**

Read, Rae Myranda (Prineville), Broker 201210755, Stipulated Final Order dated September 24, 2020, issuing a revocation and a \$1,500 civil penalty for unlicensed activity.

**SUSPENSIONS**

Alcantara, Elisha Ann (Portland), Principal Broker 201208722, Stipulated Final Order dated October 7, 2020, issuing a surrender of Elisha Alcantara's principal broker license, issuing Elisha Alcantara a limited broker license, and a 90 day suspension starting on October 22, 2020 and continuing through January 19, 2021.

Greene, Alicia Ann (Hawthorne, CA), Principal Broker 200810096, Stipulated Final Order dated November 5, 2020, issuing a 90 day suspension starting on November 5, 2020.

**REPRIMANDS**

Walls, Deanna M (Lakeview) Principal Broker 200309289, Stipulated Final Order dated September 17, 2020, issuing a reprimand with education.

Chapman, Amanda MPM (Prineville) Broker 200606383, Final Order by Default dated October 8, 2020, issuing a reprimand.

Hawks, Victoria M (Roseburg) Principal Broker 900200025, Stipulated Final Order dated November 4, 2020, issuing a reprimand with education.

**CIVIL PENALTIES**

Expired — Late Renewal civil penalties are computed using each 30-day period as a single offense. The civil penalty for the first 30-day period can range from \$100-\$500, with each subsequent 30-day period ranging from \$500-\$1,000. ORS 696.990

REAL ESTATE AGENCY  
BEFORE THE REAL ESTATE COMMISSIONER

In the Matter of the Real Estate License of )  
MYRANDA RAE READ ) STIPULATED FINAL ORDER

The Oregon Real Estate Agency (Agency) and Miranda Rae Read (Read) do hereby agree and stipulate to the following:

FINDINGS OF FACT  
&  
CONCLUSIONS OF LAW  
1.

1.1 Miranda Read (Read) was first licensed as a broker in September 2014, working for Re/Max Out West Realty, LLC, before transferring to Keller Williams Realty Central Oregon on February 17, 2017. On November 12, 2018, Read’s license became inactive and remained so until it expired on July 1, 2020.

1.2 On September 6, 2019, the Agency received a complaint from Angela Boothroyd (Boothroyd), a broker with Windermere Central Oregon Real Estate, against Read. On September 9, 2019, the Agency received complaints from Casie Conlon, the CEO of Central Oregon Association of Realtors, and Michael Warren II (Warren), a broker with Crook County Properties, against Read. The three complaints alleged that Read was impersonating Amanda Chapman (Chapman), an active real estate broker.

1.3 On June 13, 2019, Boothroyd, listing broker for 4562 SE Jerry Lane (Jerry Lane), received a text message from Read’s phone number with the following message: “Hi Angela- Amanda with KW- I’d like to show Jerry Drive tomorrow about 5:15 if possible My phone went swimming- can you let us in?” When Boothroyd asked for feedback on the showing, “Amanda” informed her that her clients decided to write an offer on another parcel.



1           1.4     During the investigation, Read admitted to sending text messages impersonating  
2 Chapman.

3     **(1) Violation:** By showing the Jerry Lane property, Read violated ORS 696.020(2) (2017  
4 edition). ORS 696.020(2) states that an individual may not engage in, carry on, advertise or  
5 purport to engage in or carry on professional real estate activity, or act in the capacity of a real  
6 estate licensee, within this state unless the individual holds an active license.

7           1.5     Lorraine Abney (Abney), principal broker with Keller Williams Realty Central  
8 Oregon provided a list of Chapman’s 2019 transactions. One of the transactions, 4791 SE  
9 David Way (David Way) in Prineville, was written around the time Read contacted Boothroyd,  
10 The home was located in the High Desert Estate Subdivision, the same subdivision as  
11 Boothroyd’s listing.

12          1.6     When reviewing the transaction file for David Way, it was discovered that Read  
13 was copied on several emails regarding the sale.

14          1.7     Kelly Jo Story (Story), listing broker for David Way, had text messages saved  
15 from “Amanda Kw.” These messages were sent from Read’s phone number.

16          1.8     On June 14, 2019, Story received the following text message from Read’s phone  
17 number: “Hey Kelly- can I show David Way tomorrow at 10am? Phone went swimming can  
18 they leave it open?”

19          1.9     According to Debra Bishop (Bishop), she and her husband were working  
20 exclusively with Read. Bishop said Read showed them five to six properties, including the  
21 David Way property.

22          1.10    During the investigation, Read admitted showing the David Way property to the  
23 Bishops while Chapman was not present.

24     **(2) Violation:** By showing the David Way property, Read violated ORS 696.020(2) (2017  
25 edition). ORS 696.020(2) states that an individual may not engage in, carry on, advertise or  
26 purport to engage in or carry on professional real estate activity, or act in the capacity of a real  
27 estate licensee, within this state unless the individual holds an active license.

28          1.11    According to Bishop, when she and her husband decided to write an offer on  
29 David Way, Read did everything including writing the offer. All documents were signed through  
30 DocuSign.

1 1.12 Read admitted to filling out the paperwork. According to Read, Chapman  
2 provided Read with her DocuSign login information. Read said Chapman was aware of the  
3 offer, but didn't see the paperwork before it was submitted.

4 1.13 On July 19, 2019, the David Way transaction closed. Documentation showed that  
5 Read profited \$1,500 from the transaction.

6 **(3) Violation:** By preparing an offer to purchase for the Bishops, Read violated ORS  
7 696.020(2) (2017 edition). ORS 696.020(2) states that an individual may not engage in, carry  
8 on, advertise or purport to engage in or carry on professional real estate activity, or act in the  
9 capacity of a real estate licensee, within this state unless the individual holds an active license.

10 1.14 On August 24, 2019, Boothroyd, listing broker for 490 NE Combs Flat Road  
11 (Combs Flat), received another text message from Read's phone number: "Hi it's Manda with  
12 KW I would like to show combs flat at 2 if possible. My phone went swimming so can you let  
13 us in or is there a hide a key?" Boothroyd was out of town at the time but followed up with a  
14 text message on August 26, 2019, letting "Manda" know she would be at the property that day  
15 if she wanted to stop by with her clients. Read responded, "We were able to get in Saturday.  
16 The roofer was there."

17 **(4) Violation:** By showing the Combs Flat property, Read violated ORS 696.020(2) (2017  
18 edition) which states that an individual may not engage in, carry on, advertise or purport to  
19 engage in or carry on professional real estate activity, or act in the capacity of a real estate  
20 licensee, within this state unless the individual holds an active license.

21 1.15 By conducting the above acts of professional real estate activity with an inactive  
22 license and while presenting herself as Chapman, Read engaged in fraudulent and dishonest  
23 conduct.

24 **(5) Violation:** By engaging in fraudulent and dishonest conduct, Read violated ORS  
25 696.301(14) (2017 edition) which states that the Real Estate Commissioner may suspend or  
26 revoke the real estate license of any real estate licensee, reprimand any real estate licensee or  
27 deny the issuance or renewal of a license to an applicant who has committed an act of fraud or  
28 engaged in dishonest conduct substantially related to the fitness of the applicant or real estate  
29 licensee to conduct professional real estate activity, without regard to whether the act or  
30 conduct occurred in the course of professional real estate activity.

2.

2.1 The foregoing violations are grounds for discipline pursuant to ORS 696.301. Based on these violations a revocation is appropriate for violations of ORS 696.301 (14).

2.2 A revocation of Read's real estate broker license is appropriate under 696.396(2)(c)(C) which states that the Real Estate Commissioner may authorize the revocation of a real estate license if the material facts establish a violation of a ground of discipline under ORS 696.301 that exhibits dishonesty or fraudulent conduct.

2.3 The foregoing violations also established grounds for the Agency to assess a civil penalty pursuant to ORS 696.990(5) for violations of ORS 696.020(2). Per ORS 696.990(5), the Real Estate Commissioner can require any person who violates ORS 696.020 to forfeit and pay a civil penalty up to the amount such person profited in transactions that violated ORS 696.020. Facts discovered in the investigation show Read profited \$1,500 in the transaction for real estate located at David Way.

2.4 The Agency reserves the right to investigate and pursue additional complaints that may be received in the future regarding this licensee.

2.5 In establishing the violations alleged above, the Agency may rely on one or more of the definitions contained in ORS 696.010.

2.6 According to ORS 696.775, the lapsing, expiration, revocation or suspension of a real estate license, whether by operation of law, order of the Real Estate Commissioner or decision of a court of law, or the inactive status of the license, or voluntary surrender of the license by the real estate licensee does not deprive the commissioner of jurisdiction to: (1) proceed with an investigation of the licensee; (2) conduct disciplinary proceedings relating to the licensee; (3) Take action against a licensee, including assessment of a civil penalty against the licensee for a violation of ORS 696.020(2); or (4) revise or render null and void an order suspending or revoking a license.

STIPULATION & WAIVER

I have read and reviewed the above findings of fact and conclusions of law which have been submitted to me by the Agency and, further, the order which follows hereafter. I understand that the findings of fact, conclusions of law, and this stipulation and waiver embody

1 the full and complete agreement and stipulation between the Agency and me. I further  
2 understand that if I do not agree with this stipulation, I have the right to request a hearing on  
3 this matter and to be represented by legal counsel at such a hearing. Hearings are conducted  
4 in accordance with the procedures set forth in ORS Chapter 183 and in accordance with the  
5 Rules of Practice and Procedure adopted by the Attorney General of the State of Oregon. I  
6 freely and voluntarily waive my rights to a hearing, to representation by legal counsel at such a  
7 hearing, and to judicial review of this matter.

8 I hereby agree and stipulate to the above findings of fact and conclusions of law and  
9 understand that the order which follows hereafter may be completed and signed by the Real  
10 Estate Commissioner or may be rejected by the Real Estate Commissioner. I understand that,  
11 in accordance with the provisions of ORS 696.445(3), notice of this order shall be published in  
12 the Oregon Real Estate News-Journal.

13 I agree, once the Commissioner executes this stipulated order, that I will accept service  
14 of the final order by email and hereby waive the right to challenge the validity of service.

15 ORDER

16 IT IS HEREBY ORDERED that Read's broker license be, and is hereby is, revoked.

17 IT IS FURTHER ORDERED that, pursuant to ORS 696.990(5) and based upon the  
18 violation set forth above for engaging in professional real estate activity while her license was  
19 inactive, Read pay a civil penalty of \$1,500.00, said penalty to be paid to the General Fund of  
20 the State Treasury by paying the same to the Agency.

21  
22 IT IS SO STIPULATED:

IT IS SO ORDERED:

23  
24 DocuSigned by:  
25 *Myranda Read*  
15FDA9D905F14C2...

26 MYRANDA RAE READ

27  
28 Date 9/23/2020 | 9:16 PM PDT

DocuSigned by:  
*Steven Strode*  
D141D287DDE14A0...

29 STEVEN STRODE

Real Estate Commissioner

30 Date 9/24/2020 | 1:47 PM PDT



Date of Service: 09/24/2020

REAL ESTATE AGENCY  
BEFORE THE REAL ESTATE COMMISSIONER

In the Matter of the Real Estate License of  
ELISHA ANN ALCANTARA )  
STIPULATED FINAL ORDER

The Oregon Real Estate Agency (Agency) and Elisha Ann Alcantara (Alcantara) do hereby agree and stipulate to the following:

FINDINGS OF FACT  
&  
CONCLUSIONS OF LAW

1.

1.1 At all times mentioned herein, Alcantara was licensed as a principal broker and was working under the registered business name Encompass Realty, LLC and Encompass Property Management LLC.

1.2 In August 2017, the Agency received a complaint from Kathleen Miller (Miller) against Alcantara regarding property at 7130 SW 76<sup>th</sup> Avenue, Portland, (subject property) that Alcantara flipped and listed for sale. The Agency opened an investigation.

1.3 On December 8, 2016, PDX Real Estate Partner, LLC (a company owned by Alcantara) purchased buyer's interest rights for \$17,500 from Robert Shaw (Shaw) a real estate wholesaler who was under contract to purchase the subject property from the property owners.

1.4 In December 2016 (prior to Alcantara being assigned buyer's interest rights), Shaw had purchased a home inspection on the subject property. Alcantara received a copy of this December 2016 inspection report which noted numerous issues.

1.5 On January 6, 2017, Alcantara signed a promissory note with hard money lender Silverado Funding, LLC for a 12 month loan for \$292,700 at 16% interest with \$44,700.00

1 intended to renovate the property. Encompass Realty broker, Alaina Johnson contributed  
2 \$5,000.00 earnest money as a silent investor.

3 1.6 From January through July 2017, Alcantara renovated the property through  
4 Encompass Design and Renovation (a company owned by Alcantara).

5 1.7 On July 18, 2017, Alcantara listed the subject property with RMLS for  
6 \$400,000.00 as the listing agent representing her company PDX Real Estate Partner, LLC as  
7 the seller.

8 1.8 On July 20, 2017, Alcantara completed a Seller's Property Disclosure Statement  
9 (property disclosure) for the subject property.

10 1.9 On July 22, 2017, broker Jason Anderson (Anderson) submitted the Millers' offer  
11 of \$420,000 for the subject property to Alcantara.

12 1.10 On July 26, 2016, Anderson received the property disclosure from Alcantara.

13 1.11 On August 1, 2017, the Millers had a home inspection on the subject property.  
14 The Millers terminated the transaction and on August 2, 2017, Alcantara received a copy of the  
15 August 1, 2017, home inspection performed on behalf of the Millers noting many of the same  
16 issues that were noted in the December 2016 inspection report.

17 1.12 After the Millers terminated, Alcantara convinced Carey Jones (Jones), to  
18 purchase the subject property.

19 1.13 Jones stated she had not received a property disclosure from Alcantara on the  
20 subject property and was unable to locate one in her documents. The property disclosure  
21 document provided by Alcantara for Jones' transaction was dated July 20, 2017, and appeared  
22 to be identical to the property disclosure she had provided to the Millers, but did contain an  
23 additional page disclosing Shaw had an inspection done prior to assigning the contract. It was  
24 signed by Jones on August 11, 2017.

25 1.14 The RMLS listing created by Alcantara showed Alcantara as the agent  
26 representing both the seller and buyer.

27 1.15 Alcantara did not disclose the following 13 separate material facts which she had  
28 knowledge of to the Millers or to Jones in regards to the condition of the subject property:

- 29
- The December 2016 inspection report includes a recommendation to have the sewer  
30 line scoped. The sewer line was scoped and Shaw notified Alcantara by email on  
December 5, 2016, that the plumber recommended replacing the sewer line.

1 Alcantara failed to disclose information from the December 2016 inspection  
2 regarding the sewer line condition to the Millers

- 3 • The August 2017 inspection report recommended repairing the “dripping/leaking  
4 sewer pipe.” Both the December 2016 and August 2017 inspection reports noted  
5 sewer issues that Alcantara did not disclose to Jones.
- 6 • Alcantara indicated on the property disclosure she did not know if there was  
7 insulation in the ceiling. She did not accurately disclose information received from  
8 the December 2016 inspection about the inadequate or missing insulation in  
9 attic/ceiling to the Millers.
- 10 • Both the December 2016 and August 2017 inspection reports indicate inadequate or  
11 missing insulation in the attic. Alcantara did not accurately disclose the attic/ceiling  
12 insulation levels to Jones.
- 13 • Alcantara indicated on the property disclosure that there were no defective insulated  
14 doors or windows. The August 2017 inspection report indicates leaking window  
15 thermal seals in front facing master bedroom window. Alcantara did not disclose  
16 information received from August 2017 inspection about leaking window seals to  
17 Jones.
- 18 • Alcantara indicated on the property disclosure that the roof had not leaked. The  
19 December 2016 inspection report indicates visible water staining on the ceiling of the  
20 utility room from a roof leak. She did not disclose this information about the  
21 condition of the roof she received from the December 2016 inspection to the Millers.
- 22 • Alcantara did not disclose information she received from the December 2016  
23 inspection about the condition of the roof to Jones.
- 24 • The December 2016 and August 2017 inspection reports indicate there was no  
25 handrail on the front steps per building code. Alcantara listed the property for sale  
26 and eventually sold it to Jones without the required handrail for safety and without  
27 disclosing that it failed to meet code requirements because the handrail was  
28 missing.
- 29 • The December 2016 inspection report indicates there was improper wiring in the  
30 attic that needed evaluation by an electrician. Alcantara did not disclose this  
information to the Millers.

- 1 • The August 2017 inspection report also noted there was “live/hot” wiring in contact  
2 with the wood ceiling joists in the attic that was a fire hazard. Alcantara did not  
3 disclose the information received from both inspections regarding the improper  
4 wiring to Jones.
- 5 • Alcantara did not disclose that the August 2017 inspection had been performed on  
6 the property disclosure provided to Jones.
- 7 • On March 28, 2017, Alcantara received Bulk Sample Analysis reports showing the  
8 kitchen floor contained 10% Chrysotile (friable asbestos that requires abatement by  
9 a licensed asbestos contractor). Alcantara did not hire a licensed asbestos  
10 contractor, but had the asbestos material improperly disposed of. Alcantara did not  
11 disclose the results of the asbestos testing and improper disposal of asbestos  
12 material to the Millers.
- 13 • Alcantara did not disclose the results of the asbestos testing to Jones, nor did she  
14 disclose that the 10% Chrysotile friable asbestos had been improperly removed from  
15 the subject property.

16 **(1) Violation:** By failing to disclose 13 separate material facts to the Millers and Jones  
17 Alcantara violated ORS 696.301(3) as it incorporates ORS 696.805(2)(a),(c),(3)(a),(e) (2015  
18 Edition). According to ORS 696.805(2)(a),(c),(3)(a),(e): (2) a seller’s agent owes the seller,  
19 other principals and the principal’s agents involved in a real estate transaction the affirmative  
20 duties of: (a) to deal honestly and in good faith; (c) to disclose all material facts known by the  
21 seller’s agent and not apparent or readily ascertainable to a party. (3) a seller’s agent owes the  
22 seller involved in a real estate transaction the following affirmative duties: (a) to exercise  
23 reasonable care and diligence; (e) to advise the seller to seek expert advice on matters related  
24 to the transaction that are beyond the agent expertise. Alcantara also violated ORS  
25 696.301(3) as it incorporates ORS 696.810(2)(a),(c),(3)(a),(e) (2015 Edition). ORS  
26 696.810(2)(a),(c),(3)(a),(e) states: (2) a buyer’s agent owes the buyer, other principals and the  
27 other principals’ agents involved in a real estate transaction the following affirmative duties: (a)  
28 to deal honestly and in good faith; (c) to disclose material facts known by the buyer’s agent  
29 and not apparent or readily ascertainable to a party. (3) a buyer’s agent owes the buyer  
30 involved in a real estate transaction the following affirmative duties: (a) to exercise reasonable  
care and diligence; (c) to be loyal to the buyer by not taking action that is adverse or



1 detrimental to the buyer's interest in a transaction; (e) and to advise the buyer to seek expert  
2 advice on matters related to the transaction that are beyond the agent's expertise.

3 1.16 According to Jones, Alcantara had told Jones she would make the \$21,000.00  
4 down payment on the house and Alcantara also said she would pay the difference between the  
5 amount of Jones' current rent and what the monthly mortgage would be on the subject  
6 property. Jones said her mother "loaned" her the \$21,000.00 down payment money and  
7 Alcantara paid her mother back so it appeared as if the down payment was gifted to Jones  
8 from family. Alcantara also gave her a \$9,000.00 credit toward closing cost, then put a lien on  
9 the subject property for the amount of the down payment and closing credit.

10 **(2) Violation:** By loaning Jones \$21,000 for the down payment on the subject property  
11 which was fraudulently presented to the mortgage lender as gifted funds from Jones' mother  
12 Alcantara violated ORS 696.301(3) as it incorporates ORS 696.810(2)(a),(3)(a),(c) (2015  
13 Edition). Per ORS 696.810(2)(a),(3)(a),(c): (2) a buyer's agent owes the buyer, other  
14 principals and the principals' agents involved in a real estate transaction the following  
15 affirmative duties: (a) to deal honestly and in good faith. (3) a buyer's agent owes the buyer  
16 involved in a real estate transaction the following affirmative duties: (a) to exercise reasonable  
17 care and diligence; and (c) to be loyal to the buyer by not taking action that is adverse or  
18 detrimental to the buyer's interest in a transaction.

19 1.17 Alcantara advised Jones that a home inspection of the subject property was not  
20 needed because she had already fixed everything at the subject property that needed fixing.  
21 Alcantara also advised Jones on which mortgage company to use.

22 1.18 Alcantara completed the Final Agency Acknowledgement indicating she was  
23 representing the seller exclusively, however she completed the RMLS listing for the subject  
24 property with herself noted as the buyer's and seller's agent. A Receipts and Disbursements  
25 Summary from Old Republic Title shows Encompass Realty received a 5% commission on the  
26 transaction.

27 **(3) Violation:** By acting as a disclosed limited agent by representing both the buyer and  
28 seller in the transaction and advising Jones that a home inspection was not needed Alcantara  
29 violated ORS 696.301(3) as it incorporates 696.810(2)(a),(c),(3)(a),(e) (2015 Edition). Per ORS  
30 696.810(2)(a),(c),(3)(a),(e): (2) A buyer's agent owes the buyer, other principals and the  
principals' agents involved in a real estate transaction the following affirmative duties: (a) to

1 deal honestly and in good faith; (c) to disclose material facts known by the buyer's agent and  
2 not apparent or readily ascertainable to a party. (3) A buyer's agent owes the buyer involved in  
3 a real estate transaction the following affirmative duties: (a) to exercise reasonable care and  
4 diligence; (e) to advise the buyer to seek expert advice on matters related to the transaction  
5 that are beyond the agent's expertise.

6 1.19 Alcantara discovered the master bathroom addition was not permitted prior to the  
7 Millers submitting an offer to purchase the subject property. According to Washington County  
8 Building Services, the bathroom addition in the subject property was never fully permitted.

9 1.20 In a letter to the Agency, dated September 14, 2017, Alcantara reported that,  
10 "Upon filling out seller disclosures, I looked up the permit status online to make sure I was  
11 giving accurate information. Upon doing so, I discovered there was not a permit for the  
12 bathroom addition. I immediately contacted the buyers' agent and let him know what I  
13 learned."

14 1.21 The property disclosure was completed on July 20, 2017, two days prior to the  
15 Millers submitting an offer on the subject property. Additionally, in the letter to the Agency  
16 Alcantara wrote that she, "immediately drafted and sent an addendum reflecting corrective  
17 action," yet the addendum was drafted on July 27, 2017, which is seven days after the property  
18 disclosure was completed.

19 **(4) Violation:** By making untruthful statements Alcantara engaged in dishonest conduct  
20 substantially related to the fitness of a real estate licensee in violation of ORS 696.301(14),  
21 which states a licensee's real estate license may be disciplined if they have committed an act  
22 of fraud or engaged in dishonest conduct substantially related to the fitness of the applicant or  
23 real estate licensee to conduct professional real estate activity, without regard to whether the  
24 act or conduct occurred in the course of professional real estate activity.

25 1.22 In the above mentioned actions Alcantara did the following: 1) created a  
26 reasonable probability of damage or injury to a person by making one or more material  
27 misrepresentations or false promises in a matter related to professional real estate activity; 2)  
28 demonstrated incompetence or untrustworthiness in performing any act for which a real estate  
29 licensee is required to hold a license; 3) committed an act of fraud or engaged in dishonest  
30 conduct substantially related to the fitness of the applicant or real estate licensee to conduct

1 professional real estate activity; and 4) engaged in conduct that is below the standard of care  
2 for the practice of professional real estate activity.

3 **(5) Violation:** ORS 696.301(1),(12),(14), and (15) (2015 Edition) which states a licensee's  
4 real estate license may be disciplined if they have: (1) (Created a reasonable probability of  
5 damage or injury to a person by making one or more material misrepresentation or false  
6 promises in a matter related to professional real estate activity); (12) (Demonstrated  
7 incompetence or untrustworthiness in performing any act for which the real estate licensee is  
8 required to hold a license.); (14) (Committed an act of fraud or engaged in dishonest conduct  
9 substantially related to the fitness of the applicant or real estate licensee to conduct  
10 professional real estate activity, without regard to whether the act or conduct occurred in the  
11 course of professional real estate activity);and (15) (Engaged in any conduct that is below the  
12 standard of care for the practice of professional real estate activity in Oregon as established by  
13 the community of individuals engaged in the practice of professional real estate activity in  
14 Oregon.).

15  
16 2.

17 2.1 The foregoing violations are grounds for discipline pursuant to ORS 696.301.  
18 Based on these violations a suspension is appropriate for violations of ORS 696.301(1),(12),  
19 (14) and (15).

20 2.2 A suspension of Alcantara's real estate license is appropriate under ORS  
21 696.396(2)(c)(A),(B),and (C). According to ORS 696.396(2)(c)(A),(B), and (C), the Agency  
22 may suspend a real estate license if the material facts establish a violation of a ground for  
23 discipline under ORS 696.301 that: (A) results in significant damage or injury; (B) exhibits  
24 incompetence in the performance of professional real estate activity; or (C) exhibits  
25 dishonesty or fraudulent conduct.

26 2.3 The Agency reserves the right to investigate and pursue additional complaints  
27 that may be received in the future regarding this licensee.

28 2.4 In establishing the violations alleged above, OREA may rely on one or more of  
29 the definitions contained in ORS 696.010.

30 2.5 According to ORS 696.775, the lapsing, expiration, revocation or suspension of a  
real estate license, whether by operation of law, order of the Real Estate Commissioner or

1 decision of a court of law, or the inactive status of the license, or voluntary surrender of the  
2 license by the real estate licensee does not deprive the commissioner of jurisdiction to: (1)  
3 proceed with an investigation of the licensee; (2) conduct disciplinary proceedings relating to  
4 the licensee; (3) Take action against a licensee, including assessment of a civil penalty against  
5 the licensee for a violation of ORS 696.020(2); or (4) revise or render null and void an order  
6 suspending or revoking a license.

7  
8 **STIPULATION & WAIVER**

9 I have read and reviewed the above findings of fact and conclusions of law which have  
10 been submitted to me by the Agency and further, the order which follows hereafter. I  
11 understand that the findings of fact, conclusions of law and this stipulation and waiver embody  
12 the full and complete agreement and stipulation between the Agency and me. I further  
13 understand that if I do not agree with this stipulation I have the right to request a hearing on  
14 this matter and to be represented by legal counsel at such a hearing. Hearings are conducted  
15 in accordance with the procedures set forth in ORS Chapter 183 and in accordance with the  
16 Rules of Practice and Procedure adopted by the Attorney General of the State of Oregon. I  
17 freely and voluntarily waive my rights to a hearing, to representation by legal counsel at such a  
18 hearing, and to judicial review of this matter.

19 I hereby agree and stipulate to the above findings of fact and conclusions of law and  
20 understand that the order which follows hereafter may be completed and signed by the Real  
21 Estate Commissioner or may be rejected by the Real Estate Commissioner. I understand that,  
22 in accordance with the provisions of ORS 696.445(3), notice of this order shall be published in  
23 the Oregon Real Estate News Journal.

24 I agree once the Commissioner executes this stipulated order, I will accept service of  
25 the final order by email, and hereby waive the right to challenge the validity of service.

26 ///

27 ///

28 ///

29 ///

30 ///

ORDER

IT IS HEREBY ORDERED that Alcantara’s principal broker’s license is hereby surrendered.

IT IS HEREBY ORDERED that Alcantara be issued a real estate broker’s license (Provided she has completed the broker application, paid the broker licensing fee, and had her supervising principal broker associate her license with the registered business name. This must be completed prior to the start of the suspension) with limitations as set forth below:

(a) The limited license period shall be for 2 years starting from the date the 90 day suspension is lifted on January 20, 2021.

(b) Alcantara shall not be convicted of any felony or misdemeanor during the limited license term;

(c) Alcantara shall not violate any license law or rule during the limited license term:

(d) Alcantara shall be required to give a copy of this Order to any principal broker through whom Alcantara is licensed during the limited license term, prior to licensing, and the principal broker shall acknowledge receiving a copy of this Order in writing to the Agency;

(e) The employing principal broker shall immediately notify the Agency of any criminal convictions or license law violations by Alcantara during the limited license term, and

(f) The restrictions shall continue until Alcantara (1) requests an unrestricted license, in writing, and (2) Alcantara’s principal broker endorses her for an unrestricted license in writing. The Agency will conduct an inquiry on Alcantara including but not limited to a check through the Law Enforcement Data System. If the Agency finds that there is no reason to continue the limited license, an unrestricted license will be issued.

IT IS FURTHER ORDERED that, should Alcantara violate any term or condition of this Order, it may be a basis on which to revoke Alcantara’s license in accordance with ORS 696.301(13).

IT IS FURTHER ORDERED that Alcantara’s limited broker license be suspended for 90 days, to be effective starting October 22, 2020 and continue through January 19, 2021.

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PRINCIPAL BROKER'S ACCEPTANCE

I hereby accept and agree to abide by the foregoing, and acknowledge that I have received a copy of this Order on 10/07/2020

DocuSigned by:  
*Heather Filbert*  
913592858D8F413...

Employing Principal Broker's Signature

Employing Principal Broker: Heather A. Filbert

License No: 201206474

IT IS SO STIPULATED:

IT IS SO ORDERED:

DocuSigned by:  
*Elisha Alcantara*  
3DDCAB043948457...  
ELISHA ANN ALCANTARA

DocuSigned by:  
*Steven Strode*  
D141D287DDE14A0...  
STEVEN STRODE



Date 10/7/2020 | 9:24 AM PDT

Date 10/7/2020 | 12:52 PM PDT

Date of Service: 10/07/2020

REAL ESTATE AGENCY  
BEFORE THE REAL ESTATE COMMISSIONER

In the Matter of the Real Estate License of

ALICIA ANN GREENE

STIPULATED FINAL ORDER

The Oregon Real Estate Agency (Agency) and Alicia Ann Greene (Greene) do hereby agree and stipulate to the following:

FINDINGS OF FACT  
&  
CONCLUSIONS OF LAW  
1.

1.1 At all times mentioned herein, Greene was licensed as a principal broker with RE/MAX Equity Group.

1.2 On January 29, 2016, Greene renewed her principal broker license and answered "Yes," to the question regarding criminal convictions within the last 24 months.

Criminal Conviction:

1.3 On September 8, 2015, Greene accepted a plea agreement to plead guilty to Structuring Transactions with Domestic Financial Institutions to Evade Reporting Requirements in violation of Title 31, United States Code, Section 5324 and to forfeit \$14,793.75 (her half of the commission on the related real estate deal).

1.4 On or about March 26, 2016, Greene was convicted in the United States District Court, District of Oregon (Case No: 3:15-CR-00336-S-2) of violating 31 U.S.C. § 5324(a)(3) and § 5324(d) (Structuring Transactions with Domestic Financial Institutions to Evade Reporting Requirements) and sentenced to one year of probation, a \$100 fine, and required to forfeit all interest in real or personal property involved in the charged offense.

**(1) Violation:** By pleading guilty to Structuring Monetary Transactions with Domestic

1 Financial Institutions to Evade Reporting Requirements Greene violated ORS 696.301(11)  
2 which states a licensee's real estate license may be disciplined if they have been convicted of  
3 a felony or misdemeanor which is substantially related to the real estate licensee's  
4 trustworthiness or competence to engage in professional real estate activity.

5 Facts Related to Conviction:

6 1.5 Greene was representing clients in California that were trying to buy a  
7 foreclosure house. The clients submitted a loan application and were close to closing when  
8 they only had 2 days to close due to the foreclosure. The clients' reached out to several hard  
9 money lenders.

10 1.6 Greene's brother-in-law, Chris Holenstein (Holenstein) owned Gresham Animal  
11 Hospital and loaned her clients a portion of the funds needed to close, with the understanding  
12 they would secure a loan within 6 months to repay him.

13 1.7 Holenstein wired \$850,000.00 from his line of credit to an escrow company in  
14 California.

15 1.8 Instead of her clients obtaining a loan to pay the money back, Greene's client  
16 wanted to pay Holenstein back in cash.

17 1.9 Holenstein lived in Oregon and Greene lived in California, so Holenstein asked  
18 Greene to deposit the money for him, into his bank in increments, so as not to exceed his  
19 bank's daily cash limit per customer to avoid bank fees.

20 1.10 Between June 3, 2013 and August 12, 2013, 89 deposits in amounts below  
21 \$10,000 were made to multiple banks on Holenstein's behalf.

22 1.11 Greene stated, "I followed directions obviously having no idea that making these  
23 deposits in this manner was illegal. There was no financial benefit to me. I never received a  
24 dime other than ½ the selling commission. I would not break the law intentionally for anyone  
25 and I do not believe Chris would have asked me to do anything which he thought was illegal. I  
26 practice full disclosure in real estate."

27 **(2) Violation:** Greene engaged in dishonest conduct and was convicted of Structuring  
28 Monetary Transactions with Domestic Financial Institutions to Evade Reporting Requirements  
29 in violation of ORS 696.301(14), which states a licensee's real estate license may be  
30 disciplined if they have committed an act of fraud or engaged in dishonest



1 conduct substantially related to the fitness of the applicant or real estate licensee to conduct  
2 professional real estate activity, without regard to whether the act or conduct occurred in the  
3 course of professional real estate activity.

4 1.12 On October 3, 2018, Greene’s California broker license was revoked and she  
5 was issued a 2- year restricted salesperson license. This disciplinary action was taken as a  
6 result from Greene’s criminal conviction.

7 1.13 On January 14, 2020, Greene completed her Oregon principal broker license  
8 renewal. She answered, “No,” to the question that asked if she had any occupational or  
9 professional license subjected to disciplinary action in the last 24 months.

10  
11 2.

12 2.1 The foregoing violations are grounds for discipline pursuant to ORS 696.301.  
13 Based on these violations a suspension is appropriate for violations of ORS 696.301(11) and  
14 (14).

15 2.2 A suspension of Greene’s principal broker license is appropriate under ORS  
16 696.396(2)(c)(C). According to ORS 696.396(2)(c)(C), the Agency may suspend a real estate  
17 license if the material facts establish a violation of a ground for discipline under ORS 696.301  
18 that exhibits dishonesty or fraudulent conduct.

19 2.3 The Agency reserves the right to investigate and pursue additional complaints  
20 that may be received in the future regarding this licensee.

21 2.4 In establishing the violations alleged above, OREA may rely on one or more of  
22 the definitions contained in ORS 696.010.

23 2.5 According to ORS 696.775, the lapsing, expiration, revocation or suspension of a  
24 real estate license, whether by operation of law, order of the Real Estate Commissioner or  
25 decision of a court of law, or the inactive status of the license, or voluntary surrender of the  
26 license by the real estate licensee does not deprive the commissioner of jurisdiction to: (1)  
27 proceed with an investigation of the licensee; (2) conduct disciplinary proceedings relating to  
28 the licensee; (3) Take action against a licensee, including assessment of a civil penalty against  
29 the licensee for a violation of ORS 696.020(2); or (4) revise or render null and void an order  
30 suspending or revoking a license.

STIPULATION & WAIVER

I have read and reviewed the above findings of fact and conclusions of law which have been submitted to me by the Agency and further, the order which follows hereafter. I understand that the findings of fact, conclusions of law and this stipulation and waiver embody the full and complete agreement and stipulation between the Agency and me. I further understand that if I do not agree with this stipulation I have the right to request a hearing on this matter and to be represented by legal counsel at such a hearing. Hearings are conducted in accordance with the procedures set forth in ORS Chapter 183 and in accordance with the Rules of Practice and Procedure adopted by the Attorney General of the State of Oregon. I freely and voluntarily waive my rights to a hearing, to representation by legal counsel at such a hearing, and to judicial review of this matter.

I hereby agree and stipulate to the above findings of fact and conclusions of law and understand that the order which follows hereafter may be completed and signed by the Real Estate Commissioner or may be rejected by the Real Estate Commissioner. I understand that, in accordance with the provisions of ORS 696.445(3), notice of this order shall be published in the Oregon Real Estate News Journal.

I agree once the Commissioner executes this stipulated order, I will accept service of the final order by email, and hereby waive the right to challenge the validity of service.

ORDER

IT IS HEREBY ORDERED that Green's principal broker be suspended for a period of 90 days, effective immediately from when the Commissioner signs this order.

IT IS SO STIPULATED:

IT IS SO ORDERED:

DocuSigned by:  \_\_\_\_\_  
AEA28DA410D34C5...  
ALICIA ANN GREENE

DocuSigned by:  \_\_\_\_\_  
D141D287DDE14A0...  
STEVEN STRODE



Date 11/4/2020 | 3:40 PM PST

Real Estate Commissioner  
Date 11/5/2020 | 8:03 AM PST

Date of Service: 11/05/2020

REAL ESTATE AGENCY  
BEFORE THE REAL ESTATE COMMISSIONER

In the Matter of the Real Estate License of

DEANNA M. WALLS

STIPULATED FINAL ORDER

The Oregon Real Estate Agency (Agency) and Deanna M. Walls (Walls) do hereby agree and stipulate to the following:

FINDINGS OF FACT  
&  
CONCLUSIONS OF LAW

1.

1.1 At all times mentioned herein, Walls was licensed as a principal broker with High Country Real Estate.

1.2 On February 4, 2019, the Agency emailed a Mandatory Mail-In Audit Review to High Country Real Estate (High Country), for the month of October 2018 for account ending in #8752. The reconciliation and supporting documents were due no later than 30 days from the date of the letter.

1.3 On March 8, 2019, Virginia Vernon (Vernon) contacted the Agency claiming there were issues reconciling and she appeared to be short \$200.00.

1.4 Walls called the Agency on March 15, 2019, and explained she had purchased High Country from Vernon in February 2019.

1.5 Walls emailed the requested October 2018 reconciliation documents for account ending in #8752 past the 30 day deadline to the Agency. In the same email Walls wrote Vernon had been the Principal Broker/Owner of High Country in October 2018, and Walls had not been in charge of the reconciliations at the time. Vernon was preparing to retire as soon as she could get the accounts reconciled and transfer the accounts to Walls with the correct

1 balance.

2 1.6 On May 3, 2019, Walls emailed the Agency, stating she had opened three new  
3 clients' trust accounts. Agency staff informed Walls the clients' trust accounts were not in the  
4 licensing system and Walls was required to enter them into the system within 10 business  
5 days of opening the accounts. Walls responded she would enter them immediately, however,  
6 Agency records show Walls did not enter the following clients' trust accounts: Real Estate  
7 Trust Acct-Property Management Monthly Rents ending in #1279, Real Estate Trust Account-  
8 RE Earnest Money Trust Account ending in #1885, Security Deposit Trust Account- Rental  
9 Security Deposits ending in #1395, into the licensing system until June 29, 2019, nor did she  
10 use the required naming conventions for the trust accounts.

11 1.7 Bank statement dated February 1-28, 2019, showed the account name as  
12 "Deanna M Walls Real Estate Inc., Real Estate Trust Account," for account ending in #1395.  
13 Walls stated this account was a tenant security deposit account, however, the account name  
14 on the bank statement does not identify the account as a Clients' Trust Account- Security  
15 Deposits or similar language as required.

16 **(1) Violation:** Walls failed to report following accounts: Real Estate Trust Account- RE  
17 Earnest Money Trust Account ending in #1885, Real Estate Trust Acct-Property Management  
18 Monthly Rents ending in #1279 and Security Deposit Trust Account- Rental Security Deposits  
19 ending in #1395, to the Agency within 10 days of opening the accounts in violation of ORS  
20 696.301(3) as it incorporates OAR 863-025-0025(3) (1-01-2018 Edition) which states (3)  
21 Within 10 business days from the date a clients' trust account is opened, the property manager  
22 must notify the Agency using an online process established by the Agency. Walls also violated  
23 ORS 696.301(3) as it incorporates ORS 696.245(2)(a)(b)(c)(d)(e) (2019 Edition), which states,  
24 (2) Within 10 business days from the date a clients' trust account is opened, a licensed real  
25 estate property manager or principal real estate broker shall notify the Real Estate Agency that  
26 the account has been opened. The notice must include information about the clients' trust  
27 account, including but not limited to (a) The name of the bank where the account is locate; (b)  
28 The account number; (c) The name of the account; (d) The date the account was opened; and  
29 (e) An acknowledged copy of the notice described in subsection (1) of this section.

30 **(2) Violation:** Walls failed to properly name the clients' trust accounts, a violation ORS

1 696.301(3) as it incorporates OAR 863-025-0025(1)(a)(b) (1-1-2018 Edition) which states: All  
2 clients' trust accounts and security deposits trust accounts must be labeled on all bank records  
3 and checks as: (a) "Clients' Trust Account" or "Client Trust Account"; or (b) "Clients' Trust  
4 Account – Security Deposits" or "Client Trust Account SD".

5 1.8 On May 8, 2019, Agency staff emailed Walls and Vernon asking for an  
6 explanation of the discrepancy noted on the October 2018 reconciliation documents. Walls  
7 was also asked if the account was reconciled in November of 2018, since the review was for  
8 October 2018. Walls was asked to provide reconciliation documents for November 2018 to  
9 show corrective active taken and issued a due date of May 13, 2019.

10 1.9 On May 28, 2019, Walls emailed Agency staff regarding the Mandatory Mail-In  
11 Audit Review and asked for an extension until May 31, 2019, which was granted. Walls failed  
12 to produce the records as promised by the May 31, 2019, due date.

13 **(3) Violation:** By failing to produce the records by the deadline of May 31, 2019, Walls  
14 violated ORS 696.301(3) as it incorporates OAR 863-025-0035(2)(a)(c) (1-1-18 Edition), which  
15 states (2) A property manager must produce records required under section (1) of this rule for  
16 inspection by the Agency as follows: (a) When the Agency makes a request for production of  
17 property management records, the property manager must provide such records within no less  
18 than five banking days; and (c) Failure to produce such records within the timelines stated in  
19 subsection (a) or (b) of this section is a violation of ORS 696.301.

20 1.10 On August 6, 2019, the Agency opened an investigation.

21 1.11 On August 15, 2019, Agency Financial Investigator/Auditor Lindsey Nunes  
22 (Nunes) interviewed Walls and Vernon. Walls purchased the company in February 2019 and  
23 as part of the purchase agreement she assumed all responsibility for the clients' trust  
24 accounts, but she was unaware the accounts were out of balance. When she opened new  
25 clients' trust accounts in February 2019, after purchasing the business, is when she found out  
26 the accounts were not balanced.

27 1.12 Nunes asked Walls to provide reconciliation information from when she bought  
28 the company (February 2019) up to date. Walls said she had not reconciled the accounts  
29 since she bought the business in February 2019.

30 **(4) Violation:** Walls purchased High Country in February 2019, but when an Agency

1 representative contacted her in August 2019, Walls admitted she had not yet reconciled her  
2 clients' trust accounts a violation of ORS 696.301(3) as it incorporates OAR 863-025-  
3 0028(2)(a)(A)(B)(C)(b)(c)(d)(A)(B)(e) and (3)(a)(A)(B)(C)(b)(c)(d)(A)(B)(e) (1-1-2018 Edition)  
4 which states: (2) a property manager must reconcile each clients' trust account within 30  
5 calendar days of the date of the bank statement pursuant to the requirements contained in this  
6 section. (a) The reconciliation must have three components that are contained in a single  
7 reconciliation document: (A) The bank statement balance, adjusted for outstanding checks and  
8 other reconciling bank items; (B) The balance of the record of receipts and disbursements or  
9 the check register as of the date of the bank statement; and (C) The sum of all positive owners'  
10 ledgers as of the date of the bank statement. (b) The balances of each component in section  
11 (2)(a) of this rule must be equal to and reconciled with each other. If any adjustment is needed,  
12 the adjustment must be clearly identified and explained on the reconciliation document. (c)  
13 Outstanding checks must be listed by check number, issue date, payee and amount; (d) Within  
14 30 calendar days from the date of the bank statement, the property manager must: (A)  
15 Complete the reconciliation document; and (B) Sign and date the reconciliation document,  
16 attesting to the accuracy and completeness of the reconciliation; and (e) The property  
17 manager must preserve and file in logical sequence the reconciliation document, bank  
18 statement, and all supporting documentation including, but not limited to, copies of the record  
19 of receipts and disbursements or check register and a listing of each owner's ledger balance  
20 as of the date of the bank statement; and (3) A property manager must reconcile each security  
21 deposits account within 30 calendar days of the bank statement date pursuant to the  
22 requirements contained in this section. (a) the reconciliation must have three components that  
23 are contained in a single reconciliation document: (A) the bank statement balance, adjusted for  
24 outstanding checks and other reconciling bank items; (B) the balance in the records of receipts  
25 and disbursements or the check register as of the date of the bank statement; (C) the sum of  
26 all positive balances of individual security deposits and fees held in the security deposits  
27 account. (b) the balances of each component in section (3)(a) of this rule must be equal to and  
28 reconciled with each other. If any adjustment is needed, the adjustment must be clearly  
29 identified and explained on the reconciliation document; (c) outstanding checks must be listed  
30 by check number, issue date, payee and amount; (d) within 30 calendar days of the date of

1 the bank statement, the property manager must: (A) Complete the reconciliation document;  
2 and (B) Sign and date the reconciliation document, attesting to the accuracy and completeness  
3 of the reconciliation; and (e) The property manager must preserve and file in logical sequence  
4 the reconciliation document, bank statement, and all supporting documentation including, but  
5 not limited to, copies of the record of receipts and disbursements or check register and a listing  
6 of all balances of individual security deposits and fees as of the date of the bank statement.

7 1.13 On the same day as the interview, August 15, 2019, Nunes issued Walls a  
8 demand letter for all bank statements, check registers, and tenant/owner ledger records for  
9 accounts ending in #1279, #1885, and 1395. The records were to be submitted immediately.

10 1.14 On August 29, 2019, Walls emailed the Agency an explanation of her  
11 circumstances for failing to reconcile her clients' trust accounts. She stated she would not have  
12 the records completed by August 30, 2019, however, she would have them completed by  
13 September 13, 2019. Walls did not produce all of the requested records by September 13,  
14 2019, as she promised.

15 **(5) Violation:** By failing to produce the requested records by September 13, 2019, Walls  
16 violated ORS 696.301(3) as it incorporates OAR 863-025-0035(2)(a)(c) (1-1-18 Edition), which  
17 states: (2) A property manager must produce records required under section (1) of this rule for  
18 inspection by the Agency as follows: (a) When the Agency makes a request for production of  
19 property management records, the property manager must provide such records within no less  
20 than five banking days; and (c) Failure to produce such records within the timelines stated in  
21 subsection (a) or (b) of this section is a violation of ORS 696.301.

22 1.15 Check register for security deposits account ending in #1395 dated February 1-  
23 July 31, 2019 shows entries from February 1-April 23, 2019, which do not include all required  
24 information for the payee, or the purpose of the funds and identity of the person who tendered  
25 the funds or the identifying code.

26 1.16 Check register dated February 1-July 31, 2019 for clients' trust account ending in  
27 #1379 fails to show for receipt of funds, the purpose and identity of the person who tendered  
28 the funds, and for each disbursement, the purpose of the disbursement.

29 **(6) Violation:** By failing to provide a check register for the clients' trust account and  
30 security deposits account which met all requirements, Walls violated ORS 696.301(3) as it

1 incorporates OAR 863-025-0040(2)(a)(C)(b)(C)(D)(c) (1-1-18 Edition) which states: (2) A  
2 record of receipts and disbursements or a check register must contain at least the following  
3 information: (a) For each receipt of funds: (C) The purpose of the funds and identity of the  
4 person who tendered the funds, and (b) For each disbursement of funds, (C) The check  
5 number and payee of the disbursement; and (D) The purpose of the disbursement; (c) If there  
6 is more than one property in a clients' trust account, each entry for a receipt, deposit or  
7 disbursement must be identified with the applicable identifying code.

8 1.17 Bank Statement for security deposits account ending in #1395 dated March 1-31,  
9 2019, shows a deposit on March 11, 2019 for \$10,130.00. Walls stated these were rent funds  
10 that were deposited into the account in error. Walls provided a check register showing the  
11 error, and a deposit slip correcting the error.

12 1.18 Review of the February 1-July 31, 2019, check register for security deposits  
13 account ending in #1395 shows in addition to the \$10,130.00 rents deposited in error, rental  
14 income was deposited in April 2019 into the security deposits account.

15 **(7) Violation:** By repeatedly depositing rental income into security deposits account ending  
16 in #1395, Walls violated ORS 696.301(3) as it incorporates OAR 863-025-0025(8)(a) (1-1-18  
17 Edition), which states, (8) Only the following funds may be held in a security deposits account:  
18 (a) Security deposits as defined in OAR 863-025-0010.

19 1.19 On November 29, 2019, the Agency received five months of reconciliations  
20 including February, April, May, June and July of 2019 for security deposits account ending in  
21 #1395.

22 1.20 These reconciliations show on the single trust account reconciliation document, a  
23 completed date within the required 30-days of the bank statement, yet the supporting  
24 documentation for these reconciliations shows they were generated in the month of October  
25 2019.

26 **(8) Violation:** By backdating her professional real estate records Wells violated ORS  
27 696.301(12) (2019 Edition), which states a licensee's real estate license may be disciplined if  
28 they have (12) Demonstrated incompetence or untrustworthiness in performing any act for  
29 which the real estate licensee is required to hold a license.

30 1.21 On May 19, 2020, the Agency requested Walls submit supporting documentation



1 for Part II (the check register) and Part III (owner ledgers) relating to clients' trust account  
2 ending in #1379 and security deposits account ending in #1396. Walls was given the deadline  
3 of the following business day at 5:00pm to submit the remaining documents. Walls did not  
4 make the deadline, but replied to the email on May 21, 2020 stating she was out of the office,  
5 but would have the documents printed out that morning. Walls exchanged several emails back  
6 and forth with Agency staff clarifying what the Agency was asking for. On May 27, 2020, Walls  
7 emailed the Agency asking for an extension to submit the remaining supporting documents for  
8 the March 2020 monthly reconciliations. Commissioner Steve Strode granted Walls an  
9 extension of June 15, 2020. Walls failed to submit the requested supporting documentation by  
10 the June 15, 2020 deadline.

11 **(9) Violation:** By failing to provide complete records by June 15, 2020, Walls violated ORS  
12 696.301(3) as it incorporates OAR 863-025-0035(2)(a)(c) (1-1-2018 Edition), which states, (2)  
13 A property manager must produce records required under section (1) of this rule for inspection  
14 by the Agency as follows: (a) When the Agency makes a request for production of property  
15 management records, the property manager must provide such records within no less than five  
16 banking days; and (c) Failure to produce such records within the timelines stated in subsection  
17 (a) or (b) of this section is a violation of ORS 696.301.

18 1.22 All of the above violations demonstrate incompetence in performing any act for  
19 which Walls is required to hold a license. Additionally, the above violations show Walls  
20 engaged in conduct below the standard of care for the practice of professional real estate  
21 activity in Oregon.

22 **(10) Violations:** ORS 696.301(12)(15) (2019 Edition) which states a licensee's real estate  
23 license may be disciplined if they have: (12) demonstrated incompetence in performing any act  
24 for which the real estate licensee is required to hold a license, and (15) engaged in conduct  
25 below the standard of care for the practice of professional real estate activity in Oregon.  
26

## 27 2.

28 2.1 The foregoing violations are grounds for discipline pursuant to ORS 696.301(3),  
29 (12), and (15). Based on these violations a reprimand is appropriate for violations of ORS  
30 696.301(3),(12), and (15).



1 the final order by email, and hereby waive the right to challenge the validity of service.

2 ORDER

3 IT IS HEREBY ORDERED that Deanna Wall's principal broker license be, and hereby is  
4 reprimanded.

5 IT IS FURTHER ORDERED that Walls complete the 27-hour Property Manager  
6 Advanced Practices Course, (detailed in OAR 863-022-0022, 1-1-2018 Edition) within six  
7 months from the when the Commissioner signs this order. Walls must submit a certificate to  
8 the Agency showing completion of the 27-hour Property Manager Advanced Practices Course.  
9 This certificate must be submitted to the Agency no later than the 10 days after the education  
10 has been completed.

11  
12 IT IS SO STIPULATED:

IT IS SO ORDERED:



13  
14 DocuSigned by:  
15 DEANNA M WALLS  
16 DEANNA M. WALLS  
C0FAD3E782864DB...

DocuSigned by:  
Steven Strode  
STEVEN STRODE  
D141D287DDE14A0...

Real Estate Commissioner

17  
18 Date 9/16/2020 | 4:29 PM CDT

Date 9/17/2020 | 7:57 AM PDT

19  
20 Date of Service: 09/17/2020

REAL ESTATE AGENCY  
BEFORE THE REAL ESTATE COMMISSIONER

In the Matter of the Real Estate License of

AMANDA MPM CHAPMAN



FINAL ORDER BY DEFAULT

**PROCEDURAL HISTORY**

1.

1.1 On September 10, 2020, the Real Estate Commissioner issued, by certified mail, a *Notice of Intent to Reprimand* the real estate broker license of Amanda MPM Chapman (Chapman). The Oregon Real Estate Agency (Agency) sent the Notice of Intent to Chapman's last known address of record with the Agency (817 NW Locust St., Prineville, OR 97754). The *Notice of Intent* was also mailed to Chapman by regular first class mail in a handwritten envelope to the above address.

1.2 The notice was also emailed to Chapman at her email address of record.

1.3 Neither the certified mailings nor the first class mailings have been returned to the Agency. Over 20 (20 days) have elapsed since the mailing of the notice issued in this matter and no written request for hearing has been received.

2.

Based upon the foregoing and upon a review of the above described investigation reports, documents and files, the Real Estate Commissioner finds:

2.1 Oregon Administrative Rule 863-001-0006 states, in part, that a notice of intent is properly served when deposited in the United States mail, registered or certified mail, addressed to the real estate licensee or to any other person having an interest in a proceeding before the Commissioner at the licensee's or other person's last known address of record with OREA.

2.2 Chapman's last known address of record with the Agency was 817 NW Locust St., Prineville OR 97754.

2.3 A certified mailing of the notice of intent was mailed to Chapman at her last known address of record on September 10, 2020. The Domestic Return Receipt for the certified mailing returned to the Agency and showed the notice was delivered on September 17, 2020, and was signed for and received by Patsy M. Owens.

2.4 The notice was also mailed regular first class mail in a handwritten envelope to the address of record for Chapman. The mailing in the handwritten envelope have not been returned to OREA. In accordance with ORS 40.135(1)(q), there is a presumption that the mailing properly addressed and placed with the U.S. Postal Service was delivered. That presumption has not been overcome by any evidence.

2.5 Over twenty (20) days have elapsed since the mailing of the notice and no written request for a hearing has been received.

2.6 According to ORS 696.775, the lapsing, expiration, revocation or suspension of a real estate license, whether by operation of law, order of the Real Estate Commissioner or decision of a court of law, or the inactive status of the license, or voluntary surrender of the license by the real estate licensee does not deprive the commissioner of jurisdiction to: (1) proceed with an investigation of the licensee; (2) conduct disciplinary proceedings relating to the licensee; (3) Take action against a licensee, including assessment of a civil penalty against the licensee for a violation of ORS 696.020(2); or (4) revise or render null and void an order suspending or revoking a license.

2.7 As noted in paragraph 9 of the *Notice of Intent to Reprimand* the Agency's entire investigation file was designated as the record for purposes of presenting a prima facie case upon default, including submissions from Chapman and all information in the administrative file relating to the mailing of notices and any responses received.

### **FINDINGS OF FACT**

#### 3.

3.1 Chapman was licensed as a real estate broker. Chapman's license expired on November 1, 2019, when she failed to renew her license in October 2019. Prior to her license expiring, Chapman worked for Keller Williams Realty Central Oregon.

3.2 On September 9, 2019, the Agency received a complaint from Casie Conlon, Chief Executive Officer with the Central Oregon Association of Realtors alleging that Myranda Read was impersonating Amanda Chapman (Chapman).

3.3 Myranda Read (Read) was first licensed as a broker in September 2014, working for Re/Max Out West Realty, LLC, before transferring to Keller Williams Realty Central Oregon on February 17, 2017. On November 12, 2018, Read's license became inactive and on July 1, 2020, Read's license expired.

3.4 On June 13, 2019, Angela Boothroyd (listing broker for 4562 SE Jerry Lane) received a text message from Read's phone number with the following message, "Hi Angela- Amanda with KW- I'd like to show Jerry Drive tomorrow about 5:15 if possible My phone went swimming- can you let us in?" When Boothroyd asked for feedback on the showing, "Amanda" informed her that her clients decided to write an offer on another parcel.

3.5 Lorraine Abney (Abney), principal broker with Keller Williams Realty Central Oregon provided a list of Chapman's 2019 transactions. One of the transactions (4791 SE David Way, Prineville) was written around the time Read contacted Boothroyd, The home was located in the High Desert Estate Subdivision, the same subdivision as Boothroyd's listing.

3.6 Reviewing the transaction file for 4791 SE David Way, Read was copied on several emails regarding the transaction.

3.7 Listing broker, Kelly Jo Story (Story) for 4791 SE David Way had text messages saved from, "Amanda Kw." These messages were sent from Read's phone number.

3.8 On June 14, 2019, Story received the following text message, "Hey Kelly- can I show David Way tomorrow at 10am? Phone went swimming can they leave it open?"

3.9 Story had a second contact saved as, "Amanda Remax." This second contact was associated with the phone number the Agency has for Chapman. Story provided some

text messages between her and Chapman's phone number involving the 4791 SE David Way transaction, however, the majority of Story's communication was with Read's number.

3.10 According to the buyer, Debra Bishop, she was working exclusively with Read, who showed them 5-6 properties before deciding to write an offer on 4791 SE David Way. Bishop said Read did everything, including writing the offer. All documents were signed through DocuSign.

3.11 During the investigation, Read admitting to sending text messages impersonating Chapman and admitted showing the property to the Bishops, while Chapman was not present. Read stated she filled out the paperwork. According to Read, Chapman provided Read with her DocuSign login information. Read said Chapman was aware of the offer, but didn't see the paperwork before it was submitted.

3.12 Chapman admitted working with Read to help find the buyers for David Way.

3.13 On July 19, 2019, the 4791 SE David Way transaction closed.

3.14 In an unrelated transaction, on July 1, 2019, Read sent a text message to Michael Warren II (Warren) stating the following, "Hi Mike- Amanda Chapman I would like to show the 160 acres tomorrow at 5."

3.15 There were a few messages back and forth before Warren asked if she would like him to email her any maps. Read responded, "Please send it to my partner Myrandaread@yahoo.com." On July 2, 2019, Warren emailed a copy of the maps to myrandaread@yahoo.com and amandachapmanbroker@gmail.com. Chapman responded the next day with, "Thank you!" Read was copied on the response.

3.16 Chapman's portion of the commission was \$4,240.00 from the 4791 SE David Way transaction and after office supplies were deducted, Chapman was issued a check on July 23, 2019, for \$3,799.60. Chapman then paid Read approximately \$1,500.00 in commission.

3.17 The above-noted violations demonstrate incompetence and untrustworthiness in performing an act in which the licensee is required to hold a real estate license.

## **STATEMENT OF LAW**

### 4.

4.1 ORS 696.301(3) which states a real estate licensee's real estate license may be disciplined if they have: (3) disregarded or violated any provision of ORS 659A.421, 696.010 to 696.495, 696.600 to 696.785, 696.800 to 696.870 and 696.890 or any rule of the Real Estate Agency.

4.2 ORS 696.301(3) as it incorporates:

a. ORS 696.290(1)(a) (2017 Edition), which states except as provided in paragraph (b) of this subsection, a real estate licensee may not offer, promise, allow, give, pay or rebate, directly or indirectly give any part or share of the licensee's compensation arising from any real estate transaction or pay a finder's fee to any person who is not a real estate licensee licensed under ORS 696.022, including a non-licensed individual described in ORS 696.030.

b. ORS 696.315(1) (2017 Edition), which states a real estate licensee may not knowingly permit a non-licensed individual to engage in professional real estate activity, with or on behalf of the licensee.

4.3 ORS 696.301(12) which states a licensee's real estate license can be disciplined if they have demonstrated incompetence or untrustworthiness in performing any act for which the licensee is required to hold a license.

## **ULTIMATE FINDINGS OF FACT**

### 5.

5.1 Chapman allowed Myranda Read (Read), an inactive licensee, to show property to prospective buyers, negotiate with clients on her behalf, and access Chapman's DocuSign account to complete the transaction at 4791 SE David Way in Prineville, Oregon.

5.2 Chapman represented the buyers in the sale of 4791 SE David Way in Prineville, Oregon. After the transaction closed, Chapman paid Read a portion of her commission.

5.3 Chapman demonstrated incompetence and untrustworthiness in performing an act in which the licensee is required to hold a real estate license.

5.4 In summary, the facts above establish grounds to reprimand Chapman's broker license.



## **CONCLUSIONS OF LAW**

6.

6.1 Pursuant to ORS 183.417(4) and OAR 137-003-0670 Chapman is in default.

6.2 The material facts establish a violation of a ground for discipline under ORS 696.301 as set forth in the *Notice of Intent to Reprimand*.

6.3 Based on these violations, the Agency may reprimand Chapman's broker license.

6.4 Specifically, Chapman is subject to discipline pursuant to ORS 696.301(3) and (12). A reprimand of Chapman's broker license is appropriate for violations of ORS 696.301(3) and (12), which states in part a licensee's real estate license may be disciplined if they have: (3) disregarded or violated any provision of ORS 659A.421, 696.010 to 696.495, 696.600 to 696.785, 696.800 to 696.870 and 696.890 or any rule of the Real Estate Agency; (12) demonstrated incompetence in performing any act for which the licensee is required to hold a license.

6.5 Based on the evidence in the record, the preponderance of the evidence weighs in favor of the reprimand of Chapman's broker license.

6.6 The Agency may therefore, reprimand Chapman's broker license.

6.7 Pursuant to ORS 696.775 the expiration or lapsing of Chapman's license does not prohibit the Commissioner from proceeding with this, or further action.

## **OPINION**

7.

The Agency takes its consumer protection role very seriously. One of the fundamental requirements in licensing law is for any individual engaged in professional real estate activity to have an active real estate license. Chapman allowed Read, an inactive licensee, to engage in professional real estate activity on her behalf. Chapman knowingly permitted Read to show property, negotiate with clients, and prepare the required paperwork. Additionally, she allowed Read access to her DocuSign account to assist in gathering signatures. With Chapman's cooperation, Read nearly completed an entire real estate transaction without the benefit of an active license. Lastly, Chapman gave Read a portion of the commission arising from the real

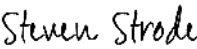


ORDER

IT IS HEREBY ORDERED that the broker license of Chapman be, and hereby is, reprimanded.

Dated this 8th day of october, 2020.

OREGON REAL ESTATE AGENCY

DocuSigned by:  
  
D141D287DDE14A0...  
Steven Strode  
Real Estate Commissioner

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NOTICE OF RIGHT TO APPEAL: You are entitled to judicial review of this Order. Judicial review may be obtained by filing a petition for review within 60 days from the date of service of this order. Judicial review is to the Oregon Court of Appeals, pursuant to the provisions of ORS 183.482.

# Certificate of Service

On October 8, 2020, I mailed and emailed the foregoing Final Order by Default issued on this date in the Agency Case No. 2020-146.

By: First Class Mail

AMANDA MPM CHAPMAN  
817 NW Locust St.  
PRINEVILLE, OR 97754

By Email:

AMANDA MPM CHAPMAN  
[Amandachapmanbroker@gmail.com](mailto:Amandachapmanbroker@gmail.com)  
amandachapman@remax

Rick Marsland  
Licensing Specialist

REAL ESTATE AGENCY  
BEFORE THE REAL ESTATE COMMISSIONER

In the Matter of the Real Estate License of

VICTORIA M. HAWKS

STIPULATED FINAL ORDER

The Oregon Real Estate Agency (Agency) and Victoria M. Hawks (Hawks) do hereby agree and stipulate to the following:

FINDINGS OF FACT  
&  
CONCLUSIONS OF LAW

1.

1.1 At all times mentioned herein, Hawks was licensed as a principal broker with Hawks & Co., Realtors.

1.2 On September 10, 2018, the Agency received a complaint from CarolAnne Durante (Durante). The Agency opened an investigation.

1.3 Durante owned property located at 51 SE Ronald Street, Winston, OR (subject property). Durante hired Kelly Forney (Forney) to represent her, and in April 2018 the subject property was listed for sale.

1.4 Hawks represented buyers, Lyle and Donna Bursik (the Bursiks). Bursiks were participating in USDA, rural housing program with zero down.

1.5 On April 19, 2018, Hawks submitted an offer to purchase the subject property, on behalf of the buyers, in the amount of \$174,900.00, with seller contributing \$5,000 towards buyers' closing costs and take responsibility for repairs required by the lender (USDA). The Certificate of Eligibility from USDA showed an expiration date of May 6, 2018. The certificate was submitted with the offer to purchase.

///

1  
2           1.6     Negotiations continued between the buyers and seller with each side submitting  
3 counter offers. Bursiks had requested the buyers produce a Certificate of Eligibility from USDA  
4 showing the approval extended to the closing date. On April 25, 2018, Durante accepted the  
5 buyer's counter offer without an updated Certificate of Eligibility.

6           1.7     On April 25, 2018, Hawks received an email from Ken Williams (Williams), Loan  
7 Officer with USDA. Attached with the email was a letter which showed the USDA home loan  
8 guidelines dated February 20, 2018. Hawks attached the letter in an email to Forney and  
9 explained that is all she could get in regards to the seller's request for an updated certificate.

10          1.8     Williams explained in an interview, once a buyer has an approved purchase  
11 agreement, a current Certificate of Eligibility is valid for the term of that purchase agreement.

12          1.9     Hawks continued to try to obtain an updated Certificate of Eligibility on behalf of  
13 her buyers and emailed another individual at USDA requesting documentation showing the  
14 USDA would lend until the end of June.

15          1.10    On May 1, 2018, a home inspection was completed. In an email dated May 2,  
16 2018, Hawks wrote to Forney and attached the home inspection reports. Hawks explained in  
17 the email, "It seemed prudent to send reports now, so Seller can see what might be necessary.  
18 However, we want to wait until USDA sees it and tells us what they require."

19          1.11    Hawks failed to send any paperwork, including the sales agreement and  
20 supporting documentation to USDA Loan Officer Williams as required.

21          1.12    On May 17, 2018, Rochelle Kennedy (Kennedy) with AmeriTitle, emailed Hawks  
22 the preliminary title report. According to the USDA guideline letter, the preliminary title report  
23 must be received and reviewed by USDA. The cover letter of the preliminary title report  
24 indicated that AmeriTitle would be sending a copy of the report to USDA. Therefore, Hawks  
25 did not send the preliminary title report to USDA.

26          1.13    Forney contacted USDA directly and spoke with Williams who was unaware of  
27 the pending transaction and had not received any documentation from Hawks, including the  
28 real estate purchase agreement as required.

29 **(1) Violation:** By failing to submit a real estate sale agreement and supporting  
30 documentation to the lender as required for the real estate located at, 51 SE Ronald Street,

1 Winston, OR, Hawks violated ORS 696.301(3) as it incorporates 696.810(2)(a)(b)(3)(a)(c)  
2 (2017 Edition), which states, (2) A buyer's agent owes the buyer, other principals and the  
3 principals' agents involved in a real estate transaction the following affirmative duties: (a) To  
4 deal honestly and in good faith; (b) To present all written offers, written notices and other  
5 written communications to and from the parties in a timely manner without regard to whether  
6 the property is subject to a contract for sale or the buyer is already a party to a contract to  
7 purchase; (3) A buyer's agent owes the buyer involved in a real estate transaction the following  
8 affirmative duties: (a) To exercise reasonable care and diligence; and (c) To be loyal to the  
9 buyer by not taking action that is adverse or detrimental to the buyer's interest in a transaction.

10 **(2) Violation:** By failing to submit the real estate sale agreement and supporting  
11 documentation to the lender as required, Hawks violated ORS 696.301(12) and (15) (2017  
12 Edition), which states, licensee's real estate license may be disciplined if they have: (12)  
13 Demonstrated incompetence or untrustworthiness in performing any act for which the real  
14 estate licensee is required to hold a license; and (15) Engaged in any conduct that is below the  
15 standard of care for the practice of professional real estate activity in Oregon as established by  
16 the community of individuals engaged in the practice of professional real estate activity in  
17 Oregon.

18 1.14 On June 12, 2019, Forney emailed Williams the sales agreement and copied  
19 Hawks on the communication.

20 1.15 On June 14, 2018, Durante elected to terminate the sales agreement.

21 2.

22 2.1 The foregoing violations are grounds for discipline pursuant to ORS 696.301.  
23 Based on these violations a reprimand is appropriate for violations of ORS 696.301(3),(12),  
24 and (15).

25 2.2 The Agency reserves the right to investigate and pursue additional complaints  
26 that may be received in the future regarding this licensee.

27 2.3 In establishing the violations alleged above, OREA may rely on one or more of  
28 the definitions contained in ORS 696.010.

29 2.4 According to ORS 696.775, the lapsing, expiration, revocation or suspension of a  
30 real estate license, whether by operation of law, order of the Real Estate Commissioner or

1 decision of a court of law, or the inactive status of the license, or voluntary surrender of the  
2 license by the real estate licensee does not deprive the commissioner of jurisdiction to: (1)  
3 proceed with an investigation of the licensee; (2) conduct disciplinary proceedings relating to  
4 the licensee; (3) Take action against a licensee, including assessment of a civil penalty against  
5 the licensee for a violation of ORS 696.020(2); or (4) revise or render null and void an order  
6 suspending or revoking a license.

7  
8 **STIPULATION & WAIVER**

9 I have read and reviewed the above findings of fact and conclusions of law which have  
10 been submitted to me by the Agency and further, the order which follows hereafter. I  
11 understand that the findings of fact, conclusions of law and this stipulation and waiver embody  
12 the full and complete agreement and stipulation between the Agency and me. I further  
13 understand that if I do not agree with this stipulation I have the right to request a hearing on  
14 this matter and to be represented by legal counsel at such a hearing. Hearings are conducted  
15 in accordance with the procedures set forth in ORS Chapter 183 and in accordance with the  
16 Rules of Practice and Procedure adopted by the Attorney General of the State of Oregon. I  
17 freely and voluntarily waive my rights to a hearing, to representation by legal counsel at such a  
18 hearing, and to judicial review of this matter.

19 I hereby agree and stipulate to the above findings of fact and conclusions of law and  
20 understand that the order which follows hereafter may be completed and signed by the Real  
21 Estate Commissioner or may be rejected by the Real Estate Commissioner. I understand that,  
22 in accordance with the provisions of ORS 696.445(3), notice of this order shall be published in  
23 the Oregon Real Estate News Journal.

24 I agree once the Commissioner executes this stipulated order, I will accept service of  
25 the final order by email, and hereby waive the right to challenge the validity of service.

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ORDER

IT IS HEREBY ORDERED that Victoria Hawks' principal broker license be, and hereby is reprimanded.

IT IS FURTHER ORDERED that Hawks complete the 27-hour Principal Broker Advanced Practices Course, (detailed in OAR 863-022-0021, 10/31/2018 Edition) within 90 days from when the Commissioner signs this order. Hawks must submit a certificate to the Agency showing completion of the 27- hour Principal Broker Advanced Practices Course. This certificate must be submitted to the Agency no later than 10 days after the education has been completed.

IT IS SO STIPULATED:

IT IS SO ORDERED:

DocuSigned by:  
*Victoria Hawks*  
607918F24D034A2...  
VICTORIA M. HAWKS

DocuSigned by:  
*Steven Strode*  
D141D287DDE14A0...  
STEVEN STRODE



Date 11/3/2020 | 2:23 PM PST

Date 11/4/2020 | 8:01 AM PST

Date of Service: 11/04/2020

**REAL ESTATE BOARD**  
**ADMINISTRATIVE SERVICES DIVISION REPORT**  
**December 7, 2020**

Section Overview

The Administrative Services Division acts as business support for the Agency overall. This division manages budget preparation, accounting, purchasing and contracting, inventory control, facilities, payroll, human resources, special projects, information technology (IT), performance and communications.

Budget Update

Financials: The Legislative Adopted Budget for the 2019-2021 biennium is **\$ 8.5 million**. The Agency cash balance as of October 31<sup>st</sup> is **\$ 4.48 million**. To date in the current biennium (July 2019 – October 2020). Agency revenue hovers around \$ 438,500 per month. After expenses, this leaves the Agency with a monthly revenue surplus of \$116,300, on average. Given that the Agency has held two management positions vacant and anticipates filling them shortly, we will see this surplus number reduce by at least 10% in 2021, holding everything else constant. Concerning signs regarding licensing numbers and renewal rates have diminished September through November. Starting in July 2020 we saw a 4% drop in on time renewals, however we have since observed this number to return to the standard 80% on time renewal rate. In the last few months, the lapsed rate hovered between 1-2% over the 2019 average which the Agency will continue to watch.

New application numbers continue to astonish in 2020 with an 18% increase in broker license applications compared to the entirety of 2019. Property Manager and Principal Broker applications are steady compared to previous years which demonstrates that real estate appears to be an attractive profession for new entrants to real estate sales, for the time being. While market concerns remain with a substantial housing shortage, low interest rates and change needs hold activity steady. The Agency is paying close attention to Oregon's market and licensing data as we proceed through this unpredictable period.

The Agency is now awaiting the Governor's Recommended Budget for the 2021-2023 biennium. This is expected in December or January. As of October 31<sup>st</sup> the Agency holds **\$4.32 million** in cash reserves. This places the Agency in a healthy position to weather a downturn if licensing and renewal numbers retract significantly. The Agency's projects \$7.4 million in revenue next biennium. The Agency's budget request to the Governor is \$9.5 million.

Organizational Change & Staffing

The Agency office remains closed to the public and staff provide customer service by phone and email while Regulation Division staff conduct investigations and settlement conferences by phone and video conference.

While there is no expected return date to the office, the Agency is working with the Department of Administrative Services' real estate and facilities team to optimize the existing space for a level of continued telework in a post Covid environment.

## Real Estate Agency - AY21

**2019-2021 Budget - Biennium to Date Through June 30th 2021**

| <i>Budget Codes</i>    |  | <u>19-2021<br/>Legislative<br/>Approved<br/>Budget</u> | <u>Expected Total<br/>Expenditures for<br/>Biennium (current)</u> | <u>Expected Remaining<br/>Limitation at end of<br/>Biennium</u> |
|------------------------|--|--|---|---|
|                        | <b>Total Personal Services</b>                   | <b>6,757,897</b>                                       | <b>6,271,057</b>  | <b>486,840</b>  |
|                        |  |  |   |   |
| <b>4100 &amp; 4125</b> | In-State Travel & Out-of-StateTravel             | 98,762   | 49,622  | 49,140  |
| <b>4150</b>            | Employee Training                                | 36,994   | 23,026  | 13,968  |
| <b>4175</b>            | Office Expenses                                  | 83,040   | 35,544  | 47,496  |
| <b>4200</b>            | Telecom/Tech Services & Support                  | 64,621   | 50,962  | 13,659  |
| <b>4225</b>            | State Government Services                        | 233,574  | 304,165   | (70,591)  |
| <b>4250</b>            | Data Processing                                  | 109,297  | 119,068   | (9,771)   |
| <b>4275</b>            | Publicity & Publications                         | 36,718   | 848   | 35,870  |
| <b>4300 &amp; 4315</b> | Professional Services & IT Professional Services | 186,339  | 239,226   | (52,887)  |
| <b>4325</b>            | Attorney General Legal Fees                      | 293,465  | 184,764   | 108,701   |
| <b>4375</b>            | Employee Recruitment                             | 7,748  | 250   | 7,498   |
| <b>4400</b>            | Dues & Subscriptions                             | 9,575  | 5,847   | 3,728   |
| <b>4425</b>            | Facilities Rent & Taxes                          | 254,611  | 243,003   | 11,608  |
| <b>4475</b>            | Facilities Maintenance                           | 4,519  | 9,644   | (5,125)   |
| <b>4575</b>            | Agency Program Related S&S                       | 41,308   | 495   | 40,813  |
| <b>4650</b>            | Other Services & Supplies                        | 88,482   | 162,676   | (74,194)  |
| <b>4700</b>            | Expendable Property \$250-\$5000                 | 29,148   | 9,555   | 19,593  |
| <b>4715</b>            | IT Expendable Property                           | 162,972  | 55,037  | 107,935   |
|                        | <b>Total Services &amp; Supplies</b>             | <b>1,741,173</b>                                       | <b>1,493,734</b>  | <b>247,439</b>  |
|                        | <b>Totals</b>                                    | <b>8,499,070</b>                                       | <b>7,764,791</b>  | <b>734,279</b>  |

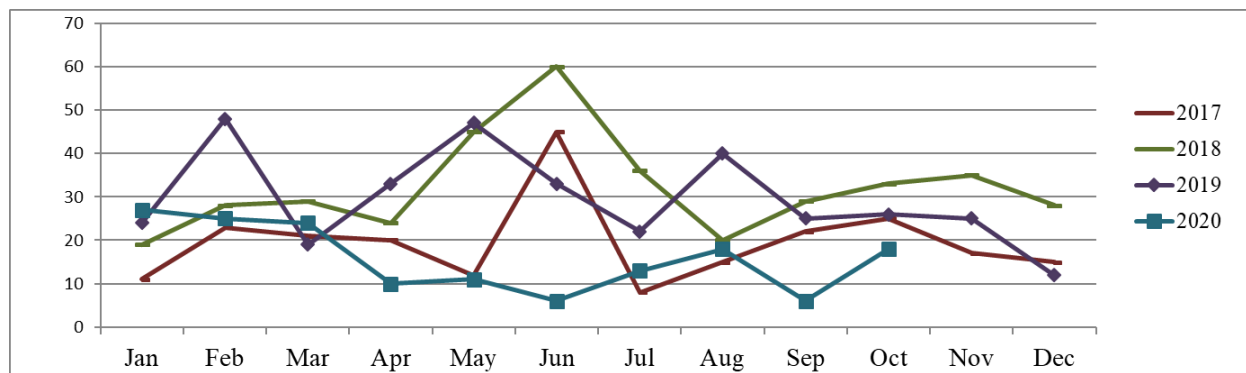
**Report to the Real Estate Board  
Land Development Division  
December 7<sup>th</sup>, 2020**

Division Manager: Michael Hanifin

Section Overview:

The Land Development Division reviews and approves filings related to condominiums, timeshares, subdivisions, manufactured home subdivisions, and membership campgrounds. The section reviews and approves the foundational documents creating these types of properties, as well as later amendments to those documents, to verify compliance with statutory requirements. We also issue the Disclosure Statement (sometimes referred to as a Public Report) required for sales of these interests to Oregonians. The Disclosure Statement summarizes key information about the condominium for the consumer, somewhat like the owner’s manual for a car.

Workload and Activity Indicators



Total filings with the division thru October of 2020 stand at 158. We’re projecting closing the year with approximately 170 filings. For perspective, that is roughly half the number of filings handled in both 2018 and 2019. By volume, this year is most equivalent to 2013.

Rulemaking:

The process of updating the advertising rules continues to move forward. We are in the listening phase of the process. The reaction from the public to this rulemaking has been relatively low key. No one testified at the hearing that was held on November 16<sup>th</sup> and we’ve received a handful of comments via email. The comments received to date have been reviewed and do not raise concerns about the proposed rulemaking. The public comment period extends thru the 21<sup>st</sup> of November, and any further comments will be reviewed and considered prior to filing a final order.

**REAL ESTATE BOARD  
EDUCATION & LICENSING DIVISION REPORT  
December 7, 2020**

Education & Licensing Manager: Madeline Alvarado

Compliance Specialist: Tami Schemmel

Compliance Specialist: Danette Rozell

Compliance Specialist: Jenifer Wetherbee

Administrative Specialist: Elizabeth Hardwick

Administrative Specialist: Rick Marsland

Administrative Specialist: Nenah Darville

Section Overview

The Education and Licensing Division acts as support to the Agency as well as the first point of contact for the public and services the business functions of the Agency overall. This division manages reception, licensing services, compliance reviews, client trust account reviews and education.

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Ongoing Impacts from both COVID-19 and Wild Fires on Educators/Licensees/Applicants

- Classroom educators have been granted permission to offer live classroom instruction via Zoom (or similar platforms).
- All licensees due for renewal are required to complete and pay their online license renewal.
- The Agency is providing 30 day extensions, for actively renewing licensees, to provide their certified continuing education class information.
- PSI is launching remote proctoring to Oregon licensees October 1, 2020. Please visit the link [here](#) to watch a short video describing the testing process.

Licensing Update

CEP Renewals- Continuing Education Providers were made eligible to renew November 1<sup>st</sup> and must renew no later than December 31<sup>st</sup>. If an approved provider fails to complete the renewal, they will have to reapply and submit the \$300 application fee.

New individual application types- Slightly increased by 10% from September to October.

License renewals- For September 82% and October 87% of licensees renewed their licenses.

Phones- Phone calls for September increased by 4% (when compared to August's phone stats) and October calls decreased by 6% when compare to October's phone stats. The average hold time for September was 21 seconds and for October was 20 seconds.

Upcoming

RBN Renewal

|                          | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|--------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| <u>Eligible to Renew</u> | 420 | 343 | 366 | 346 | 320 | 304 | 262 | 271 | 259 | 289 |     |     |
| <u>Failed to Renew</u>   | 14  | 11  | 20  | 10  | 10  | 17  | 17  | 17  | 7   | 38  |     |     |
| <u>% Renewed</u>         | 97% | 97% | 95% | 97% | 97% | 94% | 94% | 94% | 97% | 87% |     |     |

Licensing Statistics

*Total Licensee Counts by Month:*

| <b>Individuals (Persons)</b>              | <b>Sept-20</b> | <b>Oct-20</b> |
|---|----------------|---------------|
| <b>Broker – Total</b>                     | <b>16,722</b>  | <b>16,789</b> |
| Active                                    | 15,010         | 15,093        |
| Inactive                                  | 1,712          | 1,696         |
| <b>Principal Broker - Total</b>           | <b>6,384</b>   | <b>6,376</b>  |
| Active                                    | 6,005          | 5,973         |
| Inactive                                  | 379            | 403           |
| <b>ALL BROKERS Total</b>                  | <b>23,106</b>  | <b>23,165</b> |
| Active                                    | 21,015         | 21,066        |
| Inactive                                  | 2,091          | 2,099         |
| <b>Property Manager - Total</b>           | <b>954</b>     | <b>957</b>    |
| Active                                    | 832            | 823           |
| Inactive                                  | 122            | 134           |
| <b>MCC Salesperson</b>                    | <b>17</b>      | <b>15</b>     |
| <b>MCC Broker</b>                         | <b>1</b>       | <b>1</b>      |
| <b>TOTAL INDIVIDUALS</b>                  | <b>24,078</b>  | <b>24,138</b> |
| Active                                    | 21,865         | 21,905        |
| Inactive                                  | 2,213          | 2,233         |
| <b>Facilities (Companies)</b>             |                |               |
| REMO                                      | 5              | 5             |
| Registered Business Name (RBN)            | 3,872          | 3,840         |
| Registered Branch Office (RBO)            | 769            | 770           |
| Escrow Organization                       | 66             | 66            |
| Escrow Branch                             | 147            | 147           |
| PBLN                                      | NA             | NA            |
| PMLN                                      | NA             | NA            |
| CEP                                       | 316            | 317           |
| MCC Operator                              | 25             | 25            |
| <b>TOTAL FACILITIES</b>                   | <b>5,200</b>   | <b>5,170</b>  |
| <b>TOTAL INDIVIDUALS &amp; FACILITIES</b> | <b>29,278</b>  | <b>29,308</b> |

*New Licenses by Month:*

| <b>Individuals (Persons)</b>              | <b>Sept-20</b> | <b>Oct-20</b> |
|---|----------------|---------------|
| Broker                                    | 200            | 226           |
| Principal Broker                          | 13             | 16            |
| <b>TOTAL BROKERS</b>                      | <b>213</b>     | <b>242</b>    |
| Property Manager                          | 12             | 8             |
| MCC Salesperson                           | 1              | 0             |
| MCC Broker                                | 0              | 0             |
| <b>TOTAL INDIVIDUALS</b>                  | <b>226</b>     | <b>250</b>    |
| <b>Facilities (Companies)</b>             |                |               |
| Continuing Education Provider (CEP)       | 2              | 1             |
| REMO                                      | 0              | 0             |
| Registered Business Name                  | 36             | 23            |
| Registered Branch Office                  | 7              | 6             |
| Escrow Organization                       | 1              | 0             |
| Escrow Branch                             | 3              | 0             |
| MCC Operator                              | 0              | 0             |
| <b>TOTAL FACILITIES</b>                   | <b>47</b>      | <b>29</b>     |
| <b>TOTAL INDIVIDUALS &amp; FACILITIES</b> | <b>273</b>     | <b>279</b>    |

Exam Statistics

*October 2020* Total  
*ALL LICENSING EXAMS*

|                  |     |
|------------------|-----|
| Broker           | 598 |
| Property Manager | 22  |
| Principal Broker | 71  |
| Reactivation     | 1   |

Pass Rates

| <u>First Time Pass Rate</u><br><u>Percentage</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> | <u>2019</u> | <u>2020</u> |
|--|-------------|-------------|-------------|-------------|-------------|
| Broker State                                     | 64          | 61          | 58          | 57          | 51          |
| Broker National                                  | 74          | 73          | 72          | 70          | 68          |
| Principal Broker State                           | 59          | 58          | 59          | 51          | 54          |
| Principal Broker National                        | 75          | 76          | 77          | 69          | 65          |
| Property Manager                                 | 64          | 69          | 67          | 64          | 61          |

Oregon Real Estate Agency  
 Education & Licensing Division  
 Licensee Application & Renewal  
 2020 Data

| <b>New Applications</b>  |     |     |     |     |     |     |     |     |     |     |     |     |       |
|--------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
|                          | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
| <b>Brokers</b>           | 359 | 292 | 293 | 273 | 435 | 416 | 411 | 495 | 406 | 405 |     |     | 3785  |
| <b>Principal Brokers</b> | 37  | 44  | 37  | 15  | 24  | 27  | 35  | 44  | 25  | 31  |     |     | 319   |
| <b>Property Managers</b> | 21  | 23  | 20  | 19  | 20  | 24  | 23  | 31  | 24  | 16  |     |     | 221   |
| <b>Total</b>             | 417 | 359 | 350 | 307 | 479 | 467 | 469 | 570 | 455 | 452 |     |     | 4325  |

| <b>Renewal Activity</b> |          |     |     |     |     |     |     |     |     |     |     |     |     |       |
|-------------------------|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| <b>Brokers</b>          |          | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
| <b>On Time</b>          | Active   | 480 | 487 | 526 | 514 | 556 | 511 | 553 | 546 | 550 | 548 |     |     | 5271  |
|                         | Inactive | 52  | 55  | 25  | 36  | 41  | 32  | 34  | 45  | 31  | 31  |     |     | 382   |
| <b>Late</b>             | Active   | 45  | 32  | 34  | 34  | 43  | 38  | 50  | 40  | 43  | 35  |     |     | 394   |
|                         | Inactive | 11  | 11  | 7   | 13  | 12  | 10  | 11  | 14  | 8   | 8   |     |     | 105   |
| <b>Lapse</b>            |          | 85  | 92  | 100 | 107 | 97  | 114 | 130 | 135 | 128 | 102 |     |     | 1090  |
| <b>Total</b>            |          | 673 | 677 | 692 | 704 | 749 | 705 | 778 | 780 | 760 | 724 |     |     | 7242  |

| <b>Principal Brokers</b> |          | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|--------------------------|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| <b>On Time</b>           | Active   | 234 | 238 | 246 | 243 | 251 | 265 | 211 | 239 | 256 | 213 |     |     | 2396  |
|                          | Inactive | 9   | 17  | 9   | 15  | 13  | 9   | 11  | 9   | 11  | 9   |     |     | 112   |
| <b>Late</b>              | Active   | 13  | 7   | 11  | 9   | 12  | 4   | 10  | 7   | 10  | 7   |     |     | 90    |
|                          | Inactive | 0   | 2   | 3   | 1   | 1   | 2   | 2   | 1   | 1   | 1   |     |     | 14    |
| <b>Lapse</b>             |          | 23  | 20  | 30  | 23  | 22  | 18  | 36  | 26  | 25  | 20  |     |     | 243   |
| <b>Total</b>             |          | 279 | 284 | 299 | 291 | 299 | 298 | 270 | 282 | 303 | 250 |     |     | 2855  |





Oregon Real Estate Agency  
 Education & Licensing Division  
 Licensee Application & Renewal  
 2019 Data

| <b>New Applications</b>  |     |     |     |     |     |     |     |     |     |     |     |     |       |
|--------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
|                          | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
| <b>Brokers</b>           | 328 | 259 | 300 | 280 | 287 | 278 | 233 | 245 | 227 | 260 | 250 | 238 | 3185  |
| <b>Principal Brokers</b> | 47  | 32  | 39  | 25  | 32  | 24  | 36  | 14  | 23  | 32  | 38  | 26  | 368   |
| <b>Property Managers</b> | 17  | 18  | 24  | 39  | 25  | 22  | 20  | 21  | 19  | 24  | 22  | 19  | 270   |
| <b>Total</b>             | 392 | 309 | 363 | 344 | 344 | 324 | 289 | 280 | 269 | 316 | 310 | 283 | 3823  |

| <b>Renewed &amp; Lapsed Licenses</b> |          |     |     |     |     |     |     |     |     |     |     |     |     |       |
|--------------------------------------|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| <b>Brokers</b>                       |          | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
| <b>On Time</b>                       | Active   | 415 | 398 | 473 | 426 | 485 | 521 | 534 | 503 | 550 | 497 | 439 | 469 | 5710  |
|                                      | Inactive | 43  | 41  | 35  | 33  | 38  | 33  | 49  | 37  | 46  | 40  | 36  | 37  | 468   |
| <b>Late</b>                          | Active   | 42  | 25  | 37  | 47  | 67  | 40  | 52  | 32  | 50  | 35  | 35  | 52  | 514   |
|                                      | Inactive | 7   | 14  | 9   | 6   | 13  | 7   | 7   | 11  | 17  | 10  | 9   | 7   | 117   |
| <b>Lapse</b>                         |          | 79  | 103 | 102 | 96  | 102 | 87  | 99  | 116 | 103 | 105 | 78  | 99  | 1169  |
| <b>Total</b>                         |          | 586 | 581 | 656 | 608 | 705 | 688 | 741 | 699 | 766 | 687 | 597 | 664 | 7978  |

| <b>Principal Brokers</b> |          | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|--------------------------|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| <b>On Time</b>           | Active   | 211 | 188 | 208 | 215 | 205 | 243 | 250 | 258 | 243 | 215 | 203 | 233 | 2672  |
|                          | Inactive | 18  | 9   | 11  | 5   | 8   | 8   | 12  | 8   | 10  | 13  | 6   | 13  | 121   |
| <b>Late</b>              | Active   | 12  | 7   | 8   | 15  | 12  | 11  | 12  | 12  | 10  | 11  | 15  | 14  | 139   |
|                          | Inactive | 1   | 2   | 1   | 4   | 3   | 1   | 4   | 2   | 3   | 4   | 1   | 4   | 30    |
| <b>Lapse</b>             |          | 29  | 28  | 28  | 20  | 33  | 24  | 27  | 23  | 24  | 21  | 23  | 20  | 300   |
| <b>Total</b>             |          | 271 | 234 | 256 | 259 | 261 | 287 | 305 | 303 | 290 | 264 | 248 | 284 | 3262  |



**Oregon Real Estate Agency**  
**Education & Licensing Division**  
**Phone Counts**

| <b>(minutes: seconds)</b> | <b>Jan – 20</b> | <b>Feb – 20</b> | <b>Mar – 20</b> | <b>Apr – 20</b> | <b>May-20</b> | <b>Jun-20</b> | <b>Jul-20</b> | <b>Aug-20</b> | <b>Sep-20</b> | <b>Oct-20</b> | <b>Nov--20</b> | <b>Dec-20</b> | <b>2020 Average</b> |
|---------------------------|-----------------|-----------------|-----------------|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|---------------|---------------------|
| Call Count                | 2117            | 1834            | 1830            | 1474            | 1468          | 1775          | 1875          | 1678          | 1749          | 1646          |                |               | 1744.6              |
| Average Wait Time         | :25             | :21             | :19             | :23             | :25           | :35           | :29           | :26           | :21           | :20           |                |               | :24.4               |
| Maximum Wait Time         | 0:11:05         | 0:09:30         | 0:14:56         | 0:10:15         | 0:18:12       | 0:13:00       | 0:21:34       | 0:14:15       | 0:11:09       | 0:17:30       |                |               | 0:14:09             |

| <b>(minutes: seconds)</b> | <b>Jan – 19</b> | <b>Feb – 19</b> | <b>Mar – 19</b> | <b>Apr – 19</b> | <b>May-19</b> | <b>Jun-19</b> | <b>Jul-19</b> | <b>Aug-19</b> | <b>Sep-19</b> | <b>Oct-19</b> | <b>Nov--19</b> | <b>Dec-19</b> | <b>2019 Average</b> |
|---------------------------|-----------------|-----------------|-----------------|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|---------------|---------------------|
| Call Count                | 2251            | 1748            | 1917            | 2138            | 2062          | 1738          | 1882          | 1685          | 1882          | 2012          | 1606           | 1637          | 1880                |
| Average Wait Time         | :20             | :21             | :29             | :23             | :24           | :33           | :30           | :27           | :26           | :16           | :25            | :20           | :24.5               |
| Maximum Wait Time         | 16:06           | 9:32            | 21:21           | 14:03           | 15:58         | 13:20         | 11:15         | 12:00         | 13:59         | 10:15         | 5:51           | 8:21          | 12:40               |

| <b>(minutes: seconds)</b> | <b>Jan – 18</b> | <b>Feb – 18</b> | <b>Mar – 18</b> | <b>Apr – 18</b> | <b>May-18</b> | <b>Jun-18</b> | <b>Jul-18</b> | <b>Aug-18</b> | <b>Sep-18</b> | <b>Oct-18</b> | <b>Nov--18</b> | <b>Dec-18</b> | <b>2018 Average</b> |
|---------------------------|-----------------|-----------------|-----------------|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|---------------|---------------------|
| Call Count                | 2317            | 2006            | 2263            | 2063            | 2113          | 2084          | 1837          | 2049          | 1824          | 2153          | 1828           | 1738          | 2024                |
| Average Wait Time         | :22             | :15             | :17             | :16             | :16           | :27           | :21           | :19           | :21           | :23           | :17            | :25           | :20                 |
| Maximum Wait Time         | 5:32            | 3:23            | 8:58            | 7:05            | 13:27         | 12:18         | 14:40         | 12:53         | 10:26         | 13:22         | 7:41           | 10:07         | 8:29                |