

Presents

GENERAL APPRAISER REPORT WRITING & CASE STUDIES

DATES/TIMES: Thursday June 27, 2019 8:00 am Check in / 8:30 am – 5:00 pm Course
Friday June 28, 2019 8:30 am – 5:00 pm Course
Saturday June 29, 2019 8:30 am – 5:00 pm Course
Monday July 1, 2019 8:30 am – 3:00 pm Course / 3:00 – 5:00 pm Exam

LOCATION: University of San Diego, 5998 Alcalá Park, Classroom TBD, San Diego, CA 92110

COURSE SCOPE: This course provides instruction in effectively communicating a sound analysis of selected parts of a valuation. The course addresses USPAP requirements and the three types of writing most often used in appraisal reports: descriptive, numerical, and analytical. Lectures on writing principles, discussions of various sections of the appraisal report, and in-class writing exercises and presentations provide guidance and practice in effective communication of a valuation analysis. Specific assignments include writing a thesis statement, summarizing data, creating effective tables, writing a conclusion, communicating highest and best use, communicating an analysis, writing a letter of transmittal, and writing a reconciliation and opinion of value. During this four-day course, participants will use data provided in case studies as the basis for writing assignments that will help them recognize and produce effective reports.

PREREQUISITES: Successful completion of *Basic Appraisal Principles*, *Basic Appraisal Procedures*, *National USPAP 15-Hour Course*, *General Market Analysis and Highest & Best Use*, *General Appraiser Site Valuation and Cost Approach*, *General Appraiser Sales Comparison Approach*, *General Appraiser Income Approach Part 1*, and *General Appraiser Income Approach, Part 2* or equivalent courses is required.

REQUIRED EQUIPMENT: Laptops are required for this course. A financial calculator is required. The accepted model used in the course is the HP-12C. **Note:** Cellular phones, tablets, iPads, and other devices that connect to the Internet are NOT permitted during the exam. You must be familiar with calculator operation when the course begins. Answers to problems in course materials are shown using the HP-12C. ***Do not come to class expecting to be taught how to use a financial calculator.***

RECOMMENDED TEXTBOOKS: *The Appraisal of Real Estate*, 14th Edition, and *The Appraisal Writing Handbook*. Textbooks can be ordered on-line at [Textbooks](#). ***No textbooks will be available at the course.***

INSTRUCTOR: Dan L. Swango, PhD, MAI, SRA

ENROLLMENT: Enrollment is on a first-come, first served basis. If the event is filled, a waiting list will be retained. The San Diego Chapter reserves the rights to cancel, limit, or reschedule this event if the minimum enrollment level is not reached, and to change faculty assignments and facility locations at any time. Prospective students should confirm their registration with the Chapter office before making any non-refundable airline reservations.

ADA COMPLIANCE: It is the policy of the Appraisal Institute to provide reasonable accommodations for qualified persons with disabilities who are participating in Appraisal Institute educational programs. If you need accommodations to participate because of a disability, please notify us in writing at least two weeks in advance of the program and we will arrange for reasonable accommodation. Without two weeks' notice, accommodation may not be available.

EDUCATION CREDIT: This course is approved for 200 points (general) or 225 points (residential) of Appraisal Institute education credit (attend and pass exam), or for 150 points (general) or 175 points (residential) of Appraisal Institute education credit (attendance only). It is also approved in most states for basic and/or continuing education credit (in California, 28 hours of BREB continuing education credit, or 30 hours of BREB

basic education credit, including the exam, Approval No. 07754115). For information about education credit in other states, see [State Approvals](#).

ATTENDANCE: The Appraisal Institute enforces attendance requirements mandated by state licensing and certification regulatory agencies. The Appraisal Institute issues certificates for state certification/licensing or state continuing education credit that verify successful completion and attendance of 100%, with your grade notification letter for courses, or at the conclusion of seminars. One hundred percent (100%) attendance is required for all Appraisal Institute education programs. This follows Appraiser Qualification Board minimum criteria requirements.

COURSE FEE (on or before 6/12/19): Appraisal Institute Designated Members, Candidates for Designation, Practicing Affiliates, and Affiliates \$585 / All Others \$635
Course fees will increase \$50 on June 13, 2019.

CANCELLATIONS/REFUNDS: Up to 15 days prior to program start date, a \$50.00 cancellation fee will be applied to all requests for cancellation. Between two and 14 days prior to program start date, a \$225.00 cancellation fee will be applied to all requests for cancellation. Less than two days prior to program start date, no refunds will be given.

CONFIRMATION: A confirmation email will be sent within ten (10) business days of receipt of the completed enrollment application and full tuition, or immediately after enrolling online.

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ENROLLMENT APPLICATION
“GENERAL APPRAISER REPORT WRITING & CASE STUDIES”

NAME: _____

ADDRESS: _____

PHONE: _____ E-MAIL: _____

COURSE FEE (on or before 6/12/19): Appraisal Institute Designated Members, Candidates for Designation, Practicing Affiliates, and Affiliates \$585 / All Others \$635
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APPRAISAL INSTITUTE DESIGNATED MEMBERS, CANDIDATES FOR DESIGNATION, PRACTICING AFFILIATES, AND AFFILIATES MUST INDICATE CHAPTER: _____

FEE ENCLOSED: \$ _____ CHECK NO. _____

OR CHARGE CREDIT CARD: NAME ON CARD _____

BILLING ADDRESS _____

CARD TYPE (Please circle) Visa MasterCard American Express

CARD NO.: _____ EXP. DATE: _____ CCV: _____

- ✓ If paying by check, please make your check payable to “San Diego Chapter of the Appraisal Institute”. Mail your check along with this completed application to San Diego Chapter of the Appraisal Institute, 4849 Ronson Court, Suite 102, San Diego, California 92111
- ✓ If paying by credit card, mail this completed application to the above address, or FAX to (858) 292-7333, or email to patti@sdcai.org.
- ✓ Questions? E-mail patti@sdcai.org, or call (858) 292-7324

Or, register online at www.myappraisalinstitute.org/education/SanDiego/