

Best Practices for hosting your next

MAJOR INVESTOR EVENT



**A practical guide
to achieve success**

Mark your Calendar—Save the dates

- Pick 2-3 dates to host your event. Check trepac.com/events and the Texas REALTORS® calendar to avoid scheduling conflicts.
- Contact your RPAC Major Investor Council (MIC) representative to schedule events (Contact info is found on the last page)
- Contact Andrea Friedman at afriedman@texasrealtors.com for help completing the grant application.
- Submit the RPAC Major Investor grant application to NAR, allowing 6-8 weeks for in-person event execution; virtual events require less lead time (realtorparty.realtor/rpac) Note: Travel restrictions may apply for both NAR & TREPAC speakers
- Select your preferred RPAC Speaker. Based on schedule and availability, a member of the TREPAC leadership team and a Texas MIC member will also attend your planned event.
- Once approved, contact venues with potential dates. Do not confirm with the venue unless NAR approves the grant application confirming the final event date.
- To help plan or promote your TREPAC event, contact the TREPAC Fundraising & Events Coordinator at trepac@texasrealtors.com. They're here to assist!

Let's Get Busy—Planning

- Create target invite lists
 - Top Producers
 - Texas REALTORS® Leadership Program (TRLP) graduates
 - Past Major Investors
 - Brokers/Managers
 - Board of Directors
 - Young Professionals Network (YPN) members
 - Move-up investors (\$500 to \$999)
 - Affiliates
 - Other potential Major Investors
- The invite list should be 3x the intended audience
- Keep in mind your event should be intimate, with fewer than 30-35 guests
- Set expected fundraising goals. Aim for at least \$500 per person at your MI event.
- Consider co-hosting a Major Investor event or conducting during a Texas REALTORS® 360 meeting for smaller associations
- Create an event-planning timeline
- Create a marketing plan. Let the TREPAC Fundraising & Events Coordinator give you a hand!
- Help your attendees learn about TREPAC and pledge easily! Order TREPAC-branded pledge cards and other promotional materials.
- Create eye-catching email invitations
- Provide and create personalized phone scripts
- Make personal phone calls to invite attendees (ask for investment commitment over the phone)
- Utilize current Major Investors to be the host committee for your event

Note

This is not an appreciation event. When utilizing Major Investor Grant Funding, RPAC requests at least \$500 in new money from each attendee. As part of the reimbursement process, you will be asked to provide details about funds raised and pledged at your event.

Your TREPAC investment supports REALTOR® Champions-elected officials who know the value of real estate to Texas' economy in the fight for REALTOR® and consumer issues. TREPAC-supported candidates had a 98.94% Success Rate in a past election.



Show me the Money-Event Costs

- Determine food and venue costs based on attendee count.
- RPAC will reimburse up to \$100 per person for Major Investor events.
- Use other resources like affiliate sponsorships and available corporate TREPAC dollars. Always keep the 1/3 rule in mind.

It's Show Time-Event logistics

- Event email reminders and personal phone calls
- Set up agenda
- Provide podium manual or talking points (don't wing it!)
- Make it easy for people to donate! Put pledge cards, TREPAC calculators, and President's Circle info on the tables. Use the TREPAC-branded pledge cards with QR codes so attendees can log their pledges in their member portal.
- Go over event details and agenda with speakers/special guests
- Always use the term "TREPAC," but let attendees know RPAC is the same thing
- Make sure attendees get their pledges in! Have PAC trustees and host committee members with iPads ready to help at each table.
- Have a few planted Major Investors at your event
- Highlight Major Investor benefits and RPAC President's Circle Conference
- Inviting elected officials to your TREPAC Major Investor events is a good way to have them engage with attendees and help connect the dots. However, to ensure legal compliance, elected officials will need to leave the event before any solicitation for TREPAC investments is made.
- No auctions, please
- Make the ask
- Have fun!

Keep in touch-Post-event follow-up

- Send thank you notes and follow-up with attendees
- Send a "sorry we missed you" note to those who could not attend, asking them to consider becoming a Major Investor
- Submit receipts and costs to TREPAC staff for RPAC grant reimbursement promptly
- Follow-up on pledges using the pledge report found in your Tangilla board portal.
- Ensure all Major Investor money is submitted within 10 days of receipt.

Note

Some TREPAC timelines and reporting requirements may differ from RPAC.



3 Ways To Stay Informed

Text TREPAC to
512 559 1082

Follow
@TexasTREPAC
on Twitter

Visit and like facebook.
com/TREPAC

1,265

Texas REALTORS® were Major Investors in 2024. Help make 2025 even better!

Contact

RPAC Major Investor Council (MIC) members from Texas

Melinda Randall



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2025 RPAC Major Investor
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2025 TREPAC Chairman



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Contributions are not deductible for federal income tax purposes. Contributions to the Texas REALTORS® Political Action Committee (TREPAC) and the Texas Association of REALTORS® Federal Political Action Committee (TAR FedPAC)—which makes contributions to the REALTORS® Political Action Committee (RPAC)—are voluntary and may be used for political purposes. The amount indicated is merely a guideline, and you may contribute more or less than the suggested amount. You may refuse to contribute without reprisal, and the National Association of REALTORS®, Texas REALTORS®, and its local associations will not favor or disadvantage anyone because of the amount contributed. Until the RPAC annual goal is met, 70% of an individual's contribution goes to TREPAC and may be used to support state and local candidates; the remaining 30% is sent to TAR FedPAC to support federal candidates and is charged against your limits under 52 U.S.C. 30116. (Exception: 100% of an individual's contribution goes to TREPAC if the individual is an employee of an affiliate member of Texas REALTORS®.) After the RPAC annual goal is met, 100% of an individual's contribution goes to TREPAC and may be used to support state and local candidates. You may contact the Texas REALTORS® political committee administrator at 800-873-9155 to obtain information about your contributions.