ACCOUNTING & REPORTING MANUAL

A comprehensive guide for Association Executives in the collecting, remitting, and reporting of TREPAC investments.

As an association executive, you play a key role in Texas REALTORS®' tremendous political and legislative success. This is especially true for TREPAC. The Texas REALTORS® Political Action Committee (TREPAC) raised $17,250 in 1972, its first year of existence. Now, thanks in large part to the dedication of local AEs across the state, TREPAC exceeds the $7 million mark in annual investments.

To maintain TREPAC's preeminent standing and propel it to even higher levels, association executives and staff must know many rules and best practices. This manual summarizes your responsibilities, outlines basic record-maintenance tasks, defines and provides examples of different types of investments, and describes state and federal limitations and restrictions on TREPAC fundraising.


1500 Unit
1000 Unit
750 Unit
500 Unit
250 Unit
Jan.
Feb.
Mar.

Contents

Govermental Affairs structure

Every business, no matter how large or small, operates within a world of policy, regulations, laws, and long-range planning. Texas REALTORS® engages in a variety of political, legislative, and regulatory activities to protect property rights and maintain favorable conditions in Texas real estate.

TREPAC

Support for real estate friendly officials

The association's political action committee supports candidates who understand the importance of a strong real estate industry.

Public Policy

A Voice at the Capitol

Texas REALTOR® volunteers and association staff craft the association's agenda for each session of the Texas Legislature. Then during the session, they read every bill and work with lawmakers to promote that agenda.

Political Affairs

Grassroots involvement

Like real estate, politics is a relationship business. Texas REALTORS® offers Political Affairs Initiatives designed to build relationships with elected officials by developing mutual trust and open communication.
These programs aim to create and maintain a culture of political activism among Texas REALTORS® and build relationships at all three levels of government.

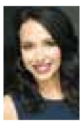
Local Issues Mobilization

Local issues advocacy

The Local Issues Program helps local associations that have identified local ordinances that could affect all Texas REALTORS® or property owners. Through the program, local associations may be allocated funding through the Texas REALTORS® Issues Political Action Committee, "TRIP" (formerly IMPAC), or receive assistance from the state association. ★

TREPAC staff roles & responsibilities

The TREPAC staff can help you with TREPAC activities and answer your questions. Do not hesitate to contact us by phone (800 873 9155) or email when you need assistance.



Leslie T. Cantu

TREPAC Director
lcantu@texasrealtors.com
Direct: 512 370 2117

- Oversees department operations
- Staff liaison for TREPAC Trustees, Nominating and Bylaws committees
- Assistance with TREPAC Trustee engagement
- Speaking engagements

Andrea Friedman, RCE, e-PRO, AHWD

Associate Director of TREPAC
afriedman@texasrealtors.com
Direct: 512 370 2147

- TREPAC training for staff at both state and local levels
- Accounting contact for TREPAC, IMPAC, FedPAC, and Direct Campaign Expenditure (DCE) activity
- Campaign finance reporting at both state and federal levels
- Staff liaison for state Association Executives and Governmental Affairs Directors
- Staff liaison for TREPAC Budget Committee

Zhelun Chen

TREPAC Manager
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- Local candidate contribution requests
- Target group outreach (affiliates, brokers, commercial practitioners, WCR, YPN, etc.)
- TREPAC Certified Brokerage and Affiliate programs
- Assist with local fundraising programs
- Staff contact for Corporate Ally Program
- TREPAC Affiliate Sponsorship program
- Staff liaison for TREPAC Education Committee

Veronica Canales

TREPAC Coordinator
vcanales @texasrealtors.com
Direct: 512 370 2122

- Coordinator for all TREPAC state-level events
- TREPAC Awards program
- Liaison for national award recognition program
- TREPAC merchandise
- Staff liaison for TREPAC Orientation Committee

Scout Garza

TREPAC Staff Accountant
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Direct: 512 370 2165

- Corporate reimbursement requests
- General assistance with TREPAC information
- Accounting support for TREPAC, IMPAC, FedPAC, and Direct Campaign Expenditure (DCE) activity

Vacant

TREPAC Staff Accountant

- Accounting support for campaign finance reporting
- Historical TREPAC reports
- Research TREPAC investment information
- Accounting support for TREPAC, IMPAC, FedPAC, and Direct Campaign Expenditure (DCE) activity

Becky Smith

TREPAC Accounting Clerk
bsmith @texasrealtors.com
Direct: 512 370 2163

- TREPAC report requests
- Accounting support for TREPAC, IMPAC, FedPAC, and Direct Campaign Expenditure (DCE) activity

The TREPAC trustees and regional field representatives for your region are another great source of information.

INTRODUCTION
to TREPAC accounting

Your basic responsibilities

Because of the working relationship between the national, state, and local associations, it is important for those involved in TREPAC to fully understand its accounting procedures at all levels. Federal and state rules that govern the operation of political action committees are strict. Your association must follow the rules and be able to verify investment amounts, types, investors, and other details.

You must submit all TREPAC investments that your association receives in a timely and accurate manner to TREPAC. You also must provide all required information regarding TREPAC investors, whether they are REALTORS® or non-members. Penalties for non-compliance can be severe.

Keep good records

Make sure your accounting software and procedures give you the ability to record required TREPAC details and that you can separate your membership accounting from your TREPAC accounting.

TREPAC fundraising reports are available anytime through the AE dashboard (see page 37). You should reconcile your own TREPAC records with these monthly reports to verify contribution amounts. This ensures that individual contributors receive proper recognition for their investments.

Track types of investments

There are two types of TREPAC investments: corporate and non-corporate (personal). Corporate funds are used to reimburse local associations' expenses to raise TREPAC funds. Your accounting records must indicate the proper type for each investment. (See chart for determining the type of investment on page 6.)

To satisfy this requirement:

- Provide TREPAC a list of members who invested
- Include the amount each person contributed
- Clearly mark each contribution as personal or corporate

If an investor is a member of more than one local association, the association that remits the check will receive credit for the investment.

Watch for illegal contributions

The law prohibits certain types of contributions to political action committees. You must refuse these investments. If you do receive an unacceptable TREPAC contribution, return it as soon as it comes to your attention.

The following types of contributions are not allowed:

- Investments made in the name of another
- Cash investments greater than $100
- Anonymous investments
- Investments from federal contractors
- Investments from foreign nationals

Scrutinize expenditures

The law not only regulates how money comes into a PAC but also how you spend it. Be certain to comply with federal, state, and local campaign finance rules. You also must be sure the association has enough funds in your local allocation account to cover reimbursable expenses. ★

REQUIRED TREPAC DISCLAIMER

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.

Successful fundraising

Many factors must come together to achieve the best fundraising results. Allow plenty of time for the planning phase of your TREPAC events.

Select an event

To choose a fundraising event that attracts a large number of people and raises the most funds, consider what types of activities will be most successful in your area. You can look at results from previous TREPAC events your association held, talk to other AEs and TREPAC trustees about their experience, and check with Texas REALTORS® staff for suggestions.

Texas law only allows TREPAC to auction alcoholic beverages in a TREPAC silent auction if a temporary auction permit is obtained from the local Texas Alcoholic Beverage Commission (TABC) office for the fundraising event. Advanced planning and close communications with association staff will be necessary in these situations.

The request form can be found at www.TexasRealEstate.com/tabc.

Please note: Each local TABC office requires a 10 business day lead time to process applications so please keep that in mind when completing your form.

Create your budget

Contact TREPAC staff as soon as you choose an event to ensure local funds are available to offset your costs.

You must follow the "one-third" rule. This rule states that the maximum cost the association may spend for fundraising items is one-third of the total funds raised by the event. The one-third rule does not apply to food or drink, facilities, and some entertainment expenses (refer to page XX).

To find out how much money is available in your association's corporate allocation, contact TREPAC staff. Funds allocated to a local association's account remain allocated until November 30 of the second calendar year in which the funds were received by TREPAC. Unused funds will revert back to the TREPAC general fund.

Market your event

What if you staged a TREPAC event and nobody knew about it? You can market the event to your members via email, on your website, through your newsletter or magazine, and by word-of-mouth. Don't forget to announce your upcoming event at all association meetings as well.

All printed marketing messages must include the TREPAC disclosure statement at the bottom of this page.

After the event

A well-attended function that raises lots of money provides great satisfaction, but there's plenty of work to do after the event is over. Attend to the necessary details in a timely manner and within all rules and guidelines.

Determine the type of investment

The law differentiates how corporate and personal (non-corporate) contributions can be spent. Because of this distinction, political action committees must track the type of each contribution received. The chart on the following page will help you determine whether an investment is corporate or personal. ★

Did you know? A corporate investment is an investment made from a company or corporation, not an individual.

Corporate vs. non-corporate investments

How to determine if an investment is personal (non-corporate) or corporate.

Did the member invest via ...

check
Is the check drawn from an individual's bank account?

- **YES** Personal
- **NO** Is the business a sole proprietorship, LP*, LLP*, LLC*, or PC*
  - **YES** Personal
  - **NO** Corporate

*Not owned in part or whole by a corporation

cash
Was the amount less than $100?

- **YES** Personal
- **NO** Refund investment*

*Cash investments over $100 will be refunded to the investor because we cannot accept such contributions.

credit card
Is the name on the card the name of an individual?

- **YES** Personal
- **NO** Is the business a sole proprietorship LLP or LLC?
  - **YES** Personal
  - **NO** Corporate

Note: If you are unsure whether a business is a sole proprietorship or not, label the investment as corporate.

investment
from affiliate or non-member

- **YES** Corporate
- **NO** See the 3 options above

Pink envelopes should contain **Personal** investments.

Green envelopes should contain **Corporate** investments.

Guidelines for accepting TREPAC investments

If you receive an investment from someone who is not a REALTOR®, you must provide the contributor's address, primary occupation, and employer at the time you remit the investment. Penalties for omitting this information from required state and federal reports can be severe.

You must add all investors, including non-members, who are making TREPAC investments to a local association to the NAR M1 database. Screenshots of how the information appears in the M1 database appear starting on page 32 of this book. Note: Non-members cannot be invited to attend TREPAC events or make a TREPAC investment. Any funds from non-members that were illegally solicited must be refunded.

When adding TREPAC investors to M1, the following information is required:

- First and last name (always use the legal name rather than nicknames.)
- Occupation
- Home address
- Firm name and address
- Joined date (Use the date of the investment for non-members)
- Member class (Non-member individuals should be entered with a member subclass of PC)

Once you have determined the types of investments and added any non-members to M1, you can fill out the reporting forms. Note that there are separate corporate and non-corporate (personal) forms for investments by cash or check. For credit-card investments, there is only one form with a field that indicates the type of investment. TREPAC reporting forms are available for download on texasrealestate.com.

TREPAC submission timelines

Local associations must adhere to transmittal time limits in collecting and forwarding funds to TREPAC. The Federal Campaign Act (FECA) sets forth specific time limits in which TREPAC investments must be transmitted to the state association.

The following time limits apply:

Investments of $50 or less must be transmitted to the association within 30 days of receipt.

Investments of more than $50 must be transmitted within 10 days of receipt.

The key is the "date of receipt." That is the date a person, such as a staff member of a local association, receives the investment directly from the investor, or the date a member soliciting and receiving TREPAC investments obtains possession of the contribution. All investments collected at the local association level must be transmitted to the state association within the time limits discussed previously.

Methods of transmitting TREPAC funds

- File Transfer Protocol (FTP) is a program used for copying files from one computer to another. You must send a check or wire/fund transfer of funds to TREPAC that directly correlates to names and amounts in the FTP file.
- REALTOR® E-commerce Network is available at no charge to MLSs and local and state associations for transmitting TREPAC funds and dues payments, online dues invoicing, online store, etc. To learn more, contact NAR Ecommerce Support by calling 1 800 874 6500.
- Via Square to easily accept all kinds of TREPAC investments including contactless. See page 48 for more information.
- Online at trepac.com/invest

Mail to Texas REALTORS® office

Physical address

1115 San Jacinto Blvd., Ste. 200
Austin, TX 78701-1906

Mailing address

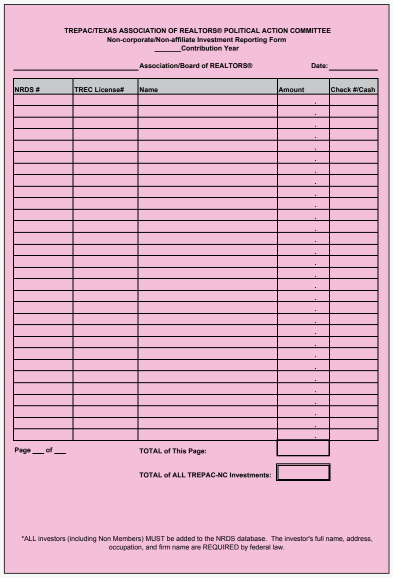
P.O. Box 2246
Austin, TX 78768-2246

Request reimbursement of fundraising costs

To request a corporate reimbursement, complete the reimbursement form available online. Go to TexasRealEstate.com > For AEs > TREPAC Resources > Forms and select "TREPAC Corporate Reimbursement." This form appears on pages 17-18 with some helpful tips. ★

Forms investment reporting

Non-corporate



TREPAC/TEXAS ASSOCIATION OF REALTORS® POLITICAL ACTION COMMITTEE
Non-corporate/Non-affiliate Investment Reporting Form
_______Contribution Year

_______________Association/Board of REALTORS® Date: _______

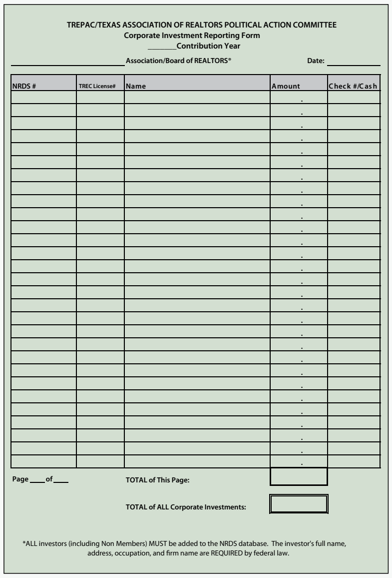
NRDS #	TREC License#	Name	Amount	Check #/Cash

Page ___ of ___ TOTAL of This Page:

TOTAL of ALL TREPAC-NC Investments:

*ALL investors (including Non Members) MUST be added to the NRDS database. The investor's full name, address, occupation, and firm name are REQUIRED by federal law.

Corporate



TREPAC/TEXAS ASSOCIATION OF REALTORS POLITICAL ACTION COMMITTEE
Corporate Investment Reporting Form
_______Contribution Year

_______________Association/Board of REALTORS® Date: _______

NRDS #	TREC License#	Name	Amount	Check #/Cash

Page ___ of ___ TOTAL of This Page:

TOTAL of ALL Corporate Investments:

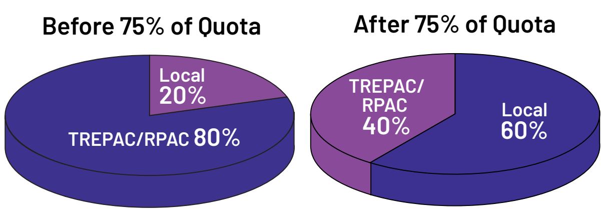
*ALL investors (including Non Members) MUST be added to the NRDS database. The investor's full name, address, occupation, and firm name are REQUIRED by federal law.


12 DIGITS
TWO POWER
%
TAX+
M+
M–
Amount
10,536.54
2,285.30
35.36

Expenditures

Contributing to candidates

You've raised a lot of money; now it's time to put it to work. First, it's helpful to understand how the money is allocated. Before a local association meets 75% of its quota, 20% of the money raised is reserved for each local association to use in local races at its discretion. The remainder is allocated to TREPAC and RPAC for contributions to national and statewide candidates (with TREPAC trustee approval and local board endorsement). After 75% of the local quota is met, 60% of funds are set aside for the local association, with the remainder going to TREPAC and RPAC.



Use non-corporate funds for candidates

Your association will use the non-corporate funds available to make direct or indirect contributions to local candidates. That includes people running for city council, school boards, hospital boards, and other local entities. Local associations are prohibited from making direct or indirect contributions to candidates running for state or federal level offices.

You can find out your association's current allocation of non-corporate funds by contacting TREPAC staff.

Funds allocated to a local association's account remain allocated until November 30 of the second calendar year in which the funds were received by TREPAC. Unused funds will revert back to the TREPAC general fund.

To request a local candidate contribution, complete the form found at TexasRealEstate.com> "Hi, Your Name > Apps|Dashboard > Local Contribution Portal. This form appears on pages 20-21 with some helpful tips.

Know where the money goes

Candidate-contribution checks for national candidates are sent to federal political coordinators for presentation to the candidate, while checks for local and state candidates are sent to a TREPAC trustee.

The following people receive email notification from TREPAC staff once a check has been mailed:

National

- All association executives (or association presidents if the association is a multi-board managed association) in the candidate's district
- Regional field representative in the candidate's district
- Governmental affairs directors (GADs) in the candidate's district
- All trustees in the candidate's district
- All Political Involvement Committee (PIC) members in the candidate's district
- Federal political coordinator (FPC)
- TREPAC leadership
- Texas REALTORS® Governmental Affairs staff

State

- AE (or local association president if the association is a multi-board managed association)
- All regional field representatives in the candidate's district
- Governmental affairs directors (GADs) in the candidate's district
- All trustees in the candidate's district
- All Political Involvement Committee (PIC) members in the candidate's district
- TREPAC leadership
- Texas REALTORS® Governmental Affairs staff
- Legislative Contact Team Member

Local

- AE (or local association president if the association is a multi-board managed association)
- All regional field representatives in the candidate's district
- Governmental affairs directors (GADs)
- Trustee
- PIC member
- Texas REALTORS® Governmental Affairs staff ★

FAQs

Frequently asked questions

What does TREPAC stand for?

Texas REALTORS® Political Action Committee

What is a non-member?

Any non-dues-paying individual except for immediate family of association members

What is a TREPAC trustee?

A PAC trustee is a REALTOR® volunteer who is recommended by the local association to serve and represent TREPAC, interviewed by the TREPAC Nominating Subcommittee, and approved by the PAC trustees.

The role of a PAC trustee is to educate and communicate to Texas REALTORS® the value of making an investment in TREPAC.

Fundraising

What is a corporate investment?

An investment made from a company or corporation, not an individual

When does the fundraising year start and end?

Fundraising cycle runs Oct. 1-Sept. 30

Investments taken after the Sept. 30 deadline will be applied to the following fundraising year.

Who sets our local association fundraising goal and why is it important for our association to reach it?

The TREPAC quota is set using association active membership numbers as of Sept. 30 of each year.

The formula is as follows:

Total Members x Fair Share ($35) = Quota

At the Texas REALTORS® Party and Leadership Summit in October, the local association then sets its own goal above or equal to the quota set by TREPAC.

All associations compete with other like-sized associations for TREPAC awards based on quota, participation, and most money raised.

Awards

Where can I get information about the different award levels?

Go to TexasRealEstate.com>For REALTOR® Members>Government Affairs>TREPAC> TREPAC Awards.

When are awards distributed?

Participation Club, 110 Club, Lone Star Statesman, and Capitol Club: November/ December

Sterling R, Crystal R, Golden R, and Platinum R: Throughout the year once that level has been completed and RPAC has been notified.

Do affiliate members get awards?

Yes, if they are dues-paying members.

What is a major investor and who distributes their awards?

A major investor is anyone who invests $1,000 or more to TREPAC. Once TREPAC notifies RPAC of the member's major-investor status, RPAC staff mails an RPAC pin directly to the member.

What are the requirements for Hall of Fame?

A member must invest $25,000 or more to TREPAC/RPAC over the course of his/her career.

How do I buy the fundraising items?

Go to TexasRealEstate.com>For REALTOR® Members>Government Affairs>TREPAC>Resources for TREPAC Leaders>Guides and Resources>Forms and select "TREPAC Merchandise Order Form."

Can I buy any of the TREPAC fundraising items just for myself?

No, all TREPAC items must be purchased by the local association using their available TREPAC corporate dollars. These items should be used to help raise TREPAC funds at local events.

Money Allocation

How do I request local funds to contribute to a local candidate?

Go to TexasRealEstate.com> TexasRealEstate.com> "Hi, Your Name > Apps|Dashboard > Local Contribution Portal

How do I request local funds to reimburse costs associated with a TREPAC fundraising event?

Go to TexasRealEstate.com > Government Affairs > For REALTOR® Members> Government Affairs>TREPAC>Resources for TREPAC Leaders>Guides and Resources> Forms and select "TREPAC Corporate Reimbursement Form."

Do local funds ever expire?

Yes. Funds allocated to a local association's account remain allocated until November 30 of the second calendar year in which the funds were received by TREPAC. Unused funds will revert to the TREPAC general fund.

OK, now that I have a little more information about TREPAC, where do I begin?

Refer to your TREPAC-GA Advocacy Guide to help set up fundraising committees, solicit for PAC chairs, plan fundraising events, and generate ideas. Or contact TREPAC staff at 800 873 9155. ★

Corporate Reimbursement Form (front)

Local Association of REALTORS®
Association

John Doe
AE or TREPAC representative

123 Main St, Ste A Austin, TX 78701
Mailing address

johndoe@email.com
Contact email

512-555-1212
Contact phone

April 4, 20XX
Event date

Send completed form with required documentation to TREPAC staff no later than 5 business days of the event.

To avoid processing delays, submit one event per form.

Event description

Tell us how you raised money at your event.

TREPAC Taco Tuesday event with online auction.

Members of the general public are non-dues-paying individuals with the exception of immediate family members of association members.

Event Attendance

How many people attended your event?

How many **Texas REALTORS® members attended**? (Include REALTORS®, designated REALTORS®, affiliates, and the **immediate family members** of these groups)	49
How many people from the **general public** attended?	+ 15
Total attendance	64

Event Revenue

How much money did you make from your event?

How much money did your event generate? Include money received from admission ticket sales, dinner/drink ticket sales, auction sales, sale of tickets to participate in **skill based games/competitions**, merchandise sales, etc. **Note:** Revenue received from the sale of **advertising or sponsorship opportunities** at your event is not Event Revenue and should not be included.	$ 20,000.00
Total event revenue	$ 20,000.00

Event Expenses

Enter the amount of direct purchases you made for the following list of items.

Auction items	$ 2,500.00
Prizes	$ 150.00
Professional entertainment	$ 100.00
Facilities	$ 560.00
Food & beverage	$ 3,000.00
Advertising & promotion	$ 250.00
All other	$ 0.00
Total event expenses	$ 6,560.00

Don't forget to include copies of fliers advertising your event.

Corporate Reimbursement Form (back)

Donations
What is the value of all in-kind donated items?

What is the total fair market value of all the auction items donated to your event? You must submit a **donated item form** for each auction item donated.	$ 1,500.00
What is the total fair market value of all the prizes donated to your event? You must submit a **donated item form** for each prize donated.	$ 150.00
What is the total fair market value of any professional entertainment donated to your event? You must submit a **donated item form** for each entertainer who donated his or her services.	$ 0.00
Total fair market value of all in-kind donated items and services	$ 1,650.00

If items are donated, use their fair market value, which is defined on page 32.

One-third rule calculation*
Did you meet the one-third rule?

Line 1 Total event revenue	$ 20,000.00
Line 2 Total amount spent on auction items, prizes, and professional entertainment plus total fair market value of all in-kind donated items and services	$ 4,400.00
One-third calculation = Line 1 divided by Line 2	4.55
Line 3 The amount to be deducted from local non-corporate TREPAC allocation when one-third rule is not met.	0.00

3.03 is greater than 3.0. This satisfies the one-third rule.

* The total event revenue must be at least three times the value of auction items, prizes, and professional entertainment, whether these items were purchased by the board or received as a donation. If the one-third calculation is less than 3, all funds generated by the event will be marked as corporate

Corporate reimbursement*
How much is your reimbursement?

Enter the total amount of your reimbursement request. The amount requested must be equal to or less than the total event expenses.	$ 1,560.00

Will a portion of the expenses be covered by an NAR grant? ☐ Yes ☐ No

If yes, please enter the grant amount approved 5,000.00

Were a portion of the expenses covered by sponsors? ☐ Yes ☐ No

If yes, please attach a list of each sponsor's name with the dollar amount paid.

* Note: If you used sponsor dollars to offset any of your event expenses, please deduct that amount from your requested reimbursement.

John Doe
Signature

John Doe
Print name of person authorized to spend local TREPAC funds

Association Executive
Title

Send form + related documents to
TREPAC
Attn: Scout Garza
P.O. Box 2246
Austin, TX 78768-2246

sgarza@texasrealtors.com

TREPAC, Texas Association of REALTORS®
Political Action Committee

Submit completed forms through e-mail, or mail to:

TREPAC
Attn: Scout Garza
P.O. Box 2246
Austin, TX 78768-2246

sgarza@texasrealtors.com

Donated Items Form

Complete this form for each item your members donate

Forms are due within 30 days if FMV of the donated item is $50 or less and are due within 10 days if the value exceeds $50.

TREPAC accepts contributed items—like tickets, gift certificates, or merchandise—to be used as auction items for fundraising purposes. Legally, these items are referred to as *in-kind contributions*.

To comply with campaign-finance law, local associations must designate such items as in-kind contributions and record the item's estimated fair-market value* (FMV). TREPAC is legally obligated to collect certain information about the item and donor.

Please note: The fair-market value of an in-kind contribution is not counted toward an individual's annual TREPAC investment total.

Jane Doe
Full name of contributor

123 Main Street
Address 1

Ste. 300
Address 2

City	State	ZIP
Austin	TX	78701

Mortgage broker
Occupation/title

ABC National Bank
Employer

$150.00
Fair market value (FMV) of contribution (nearest dollar)

10/20/14
Date item was contributed

In-kind contribution description

Wireless iPad case and keyboard for silent auction

Request Info

www.TexasRealEstate.com → Hi, Your Name → Apps|Dashboard → Local Contribution Portal

Requested Amount	1,000.00
Requesting Board	Paris Board of REALTORS®
Date Needed	Jun 30, 2023
Requestor Title	Ms.
Requestor First Name	Andrea
Requestor Last Name	Friedman
Is the Check Recipient a Federal Political Contact (FPC)?	○ Yes ◉ No
Do local campaign limits apply to this contribution?	○ Yes ◉ No
Description of local campaign limits	
Description of Request	Direct Campaign Contribution
Requester Email	afriedman@texasrealtors.com
Send Check To	◉ TREPAC Trustees ○ Directly to candidate ○ AE ○ GAD

Overlapping Territorial Juridictions

- ☐ Texarkana Board of REALTORS®
- ☐ Abilene Association of REALTORS®
- ☐ Amarillo Association of REALTORS®
- ☐ Arlington Board of REALTORS®
- ☐ Austin Board of REALTORS®
- ☐ Bandera County Board of REALTORS®
- ☐ Bastrop County Board of REALTORS®

Search Boards

Campaign Info

Title of Candidate	Ms.
First Name of Candidate	Jane
Last Name of Candidate	Doe
Active Campaign?	◉ Yes ○ No
Election Date	Jun 6, 2023
Is this race contested?:	◉ Yes ○ No
Race Priority	Important - Difficult race; REALTOR® Action is important
Race Opponents:	Mr. John Smith
Office Sought	Any City Council
District or Position	Place 1
Current Office	N/A
District or Position	N/A
Race Type	Local Race
Party Affiliation	Independent/Unaffiliated
Is the candidate a REALTOR® member?	Please Select
Campaign Address Line 1	123 Main S t
Campaign Address Line 2 (Optional)	Suite B
City	Austin
State	TX
ZIP	78701
Campaign Email	jdoe@email.com
Campaign Website	electjanedoe.com
Campaign Phone	512 555 1212
Campaign Fax	
Facebook	facebook.com/janedoe4anycity
Twitter	@jdoeanycity

TREPAC, Texas REALTORS®
Political Action Committee

Date check is needed	Date submitted
04/16/YY	04/01/YY

Mail check to

▣ Vendor ☐ Local Association

Election date

Local candidate indirect contribution request form

Use this form to request payment for radio and/or newspaper ads, targeted mail pieces, and postage to benefit a local candidate.

Vendor information

Times Herald
Company name

123 Main St.
Address 1

Ste. 200
Address 2

Austin
City

TX — 78701
State — ZIP Code

$374.00
County of Office Sought

Total invoice amount (Provide details per candidate on page 2)

List all other local associations (other than commercial overlay boards) that have territorial jurisdiction in the district of any candidate listed on page 3.

Required:

- Include copies of radio language, newspaper copy, meet and greet ads, invoices, etc. for review and approval by Texas REALTORS® Legal Department
- Do local campaign limits apply to this contribution?

  ▣ **No** ☐ **Yes**

  If yes, please provide a copy of the local ordinance and ensure contribution does not exceed local campaign contribution limits
- Is this request being made, or will it be carried out, in cooperation or consultation with the candidate or the candidate's campaign?

  ☐ **No** ▣ **Yes**

  If no, this activity will be reported as a direct campaign expenditure in support of the candidate, not an indirect contribution to the candidate.

Description of request

Political ad in support of various candidates.

For each local association listed above:

- Complete the top portion of the Notices Regarding Local Candidate Indirect Contribution Request form—only including the requested information for the candidate(s) whose district includes any territorial jurisdiction of that local association; and
- Provide the notice form to the local association and allow the local association at least 5 business days after the form was provided to respond to the request.

Local association approval

04/01/YY
Local association name — Date approved

Signing this is a confirmation that all requirements have been met. Attach any Notices Regarding Local Candidate Indirect Contribution Request forms (pg. 3) received back when submitting this request.

John Smith
Signature (confirms all requirements have been met)

John Smith
Print name of person authorized to spend local TREPAC funds

Association Executive
Title

Please attach copies of invoices and email the completed form to
zchen@texasrealtors.com

Or mail form to:
TREPAC
Attn: Zhelun Chen
P.O. Box 2246
Austin, TX 78768-2246

TEXAS REALTORS 1

TREPAC/Texas REALTORS®
Political Action Committee

Provide invoice amount per candidate, including any applicable sales tax.

Name of candidate/officeholder	Office held	Office sought	Amount per candidate
Jane Doe	Austin City Council, Pl. 1	Austin City Council, Pl. 1	$24.67
Jack Ryan	N/A	Austin City Council, Pl. 2	$24.67
Isabelle Blue	Austin Mayor	Austin Mayor	$300.00
Ike Merino	Austin City Council, Pl. 3	Austin City Council, Pl. 3	$24.66
		Total invoice amount:	$374.00

Ensure that the *Total amount of invoice* equals the total amount due from the vendor's invoice.

TREPAC/Texas REALTORS®
Political Action Committee

Notices regarding local candidate indirect contribution request

For use with the *Local Candidate Indirect Contribution Request* form, when applicable.

Notification by local association requesting local candidate indirect contribution

_______________________ intends to submit the following request for a local candidate indirect contribution:
Name of local association making the request

Description of request

Name of candidate/officeholder	Office held	Office sought	Amount per candidate

Please respond to this notification by emailing the completed form to _______________________ at
Name of local association's contact person

_______________________ by _______________ .
Contact person's email address — Date*

Please be aware that the request described may be granted without further consideration if the local association receiving this notification does not return this form by the stated date. For further information, see the Territorial Jurisdiction Advocacy Policy at www.texasrealestate.com/jurisdiction.

*Note: Do not insert a date earlier than 5 business days after this form was provided.

Response by local association with territorial jurisdiction in the candidate's district

_______________________ ☐ does or ☐ does not object to the request descibed above.
Name of local association responding to the request

Comments, if any, including clarification if the responding local association objects to some, but not all, of the request:

____
____
____

Note: A local association may object to a request on any grounds. Local associations are encouraged to try to resolve any objections before a *Local Candidate Indirect Contribution Request* form is submitted to TREPAC staff.

If any local association with territorial jurisdiction in the local candidate's district, other than an overlay board, sends a response by the stated deadline that it "does" object to the recommendation, and that objection has not been resolved and withdrawn by the time the request is submitted to TREPAC staff, TREPAC may only make an indirect contribution to the local candidate with the following vote: a two-thirds vote of TREPAC Trustees at a meeting or, if the vote is taken by other means, a two-thirds vote of all TREPAC Trustees.

John Smith
Signature, on behalf of responding local association

04/01/YY
Date

____
Print name

____
Title

TREPAC, Texas REALTORS®
Political Action Committee

Local Candidate Meet & Greet Guidelines

"Local candidates" refers to municipal and county offices.

Local association name

Event Date

Print name of person authorized to request local TREPAC support

Title

Phone

What is a Meet & Greet?

A meet and greet is a chance for Texas REALTORS® to interact with local officeholders or candidates. These events establish local Texas REALTORS® as stakeholders in the community and give candidates a chance to develop a relationship with local Texas REALTORS®.

Coordinating with Your Field Rep

There are strict limitations on how certain types of meet & greets can be funded, as well as potential reporting requirements to the Texas Ethics Commission. Therefore, it is very important that you involve your field rep in planning any meet and greets to help ensure the event is legally compliant.

Meet & Greets: Dos & Don'ts

- **Do** notify your TREPAC Trustee(s) and PIC member(s) of the event.
- **Do** ensure Major Investors attend by extending personal invitations.
- **Do** provide refreshments and allow public officials enough time to address the group and meet each TREPAC investor.
- **Do not** present contribution checks.
- **Do not** solicit TREPAC investments. (These should be separate events.)
- **Do not** mix state-level and local candidates.

SAMPLE FORMS

Planning a Meet & Greet

Provide the following information to your field rep

- **Name(s) of local officeholder(s)/candidate(s) who will be attending:** ____________________________

____

____

- **Type of event (check one)**
  - ☐ Texas REALTORS® members only
  - ☐ Texas REALTORS® members + invited guests
  - ☐ Open to public
- **Purpose of event (check one)**

☐ **Campaign support* for attending candidate(s)**

This option is available for TREPAC-supported candidates only

Note: Funding must come from the local association's allocation of TREPAC non-corporate dollars. Also, funding may be subject to local campaign contribution limits.

*"Campaign support" broadly refers to providing a campaign benefit to some, but not all, of the candidates running for particular office. Examples: Allowing distribution of campaign materials or requests for voter support of a candidate.

☐ **Neutral candidate forum where all candidates running for a particular office have been invited to participate**

Funding (check one)
- ☐ Local association's budget
- ☐ Local association's allocation of TREPAC non-corporate dollars

It is strongly recommended that you do not host a candidate forum for a race where your association has endorsed a particular candidate for the office.

☐ **Non-campaign-related* speaking opportunity for current officeholder**

Next election date for the attending officeholder(s): ____

Note: Funding will come from the local association's budget. Texas REALTORS® staff will notify you if this event option is not available due to the proximity of the next election.

*The officeholder can only speak about the real estate industry generally and/or the officeholder's role generally.

- **Local ordinance on campaign contribution limits (check one):**
  - ☐ Attached
  - ☐ Non applicable

Request for temporary permit to auction alcohol

Note: This request form must be submitted to Andrea Friedman at Texas REALTORS® **at least fifteen (15) business days** before the event. Applicants are not subject to paying a fee for a permit as long as the event includes an auction with no other alcohol sales or service to a consumer.

Information

1. Local association requesting permit

2. Name of contact person from local association

3. Phone number of contact person from local association

4. Description of event

5. Event date

6. Event start and end time

7. Event address

City State Zip

8. County

9. Description of event address,* plus attach copy of site map
*For example: Parking lot, north side of park, 1st floor of local board office building, etc.

10. Approximate number of attendees

11. Have you confirmed and obtained all necessary permissions, permits, and/or approvals from your city and county that may be required for your event?

☐ Yes ☐ No ☐ Not applicable (must explain)

12. Have you obtained permission to auction alcohol from the owner of the event premises?

☐ Yes (must attach copy) ☐ No (explain)

13. Other than the permission to auction alcohol on this property (see question #11), do you have any other contracts and/or agreements* dealing with alcohol for this event?
*For example, if a bartender or caterer has been hired for the event.

☐ Yes (must attach copy) ☐ No

Certifications (Please initial each)

____ **1.** The local association certifies that the alcoholic beverages to be auctioned will be kept separate from any other alcoholic beverages sold, stored, or served at the event premises.

____ **2.** The local association certifies that the alcoholic beverages subject to the auction, whether auctioned or not, will be removed from the premises immediately following the auction.

____ **3.** The local association certifies that the only alcohol auctioned at the event will be alcohol that has been donated to TREPAC and that the local association will submit a Donated Item form accordingly to TREPAC for each item received.

____ **4.** The local association certifies that it did not or will not request reimbursement from TREPAC for auction items purchased for the event that contain alcohol. (**Note:** A local association with a property tax exemption cannot purchase and donate alcohol as an auction item because this would be an in-kind contribution by the local board to TREPAC, making the local association ineligible for the exemption.)

Checklist

☐ Site map for event

☐ Written permission from the owner of the premises of the event to auction alcohol at the event, if applicable

☐ Other contracts and/or agreements dealing with alcohol for this event, if any

☐ Complete an inventory of alcoholic beverages to be auctioned (attached)

Acknowledgement

Printed Name

Title

Signature

Date

Send completed form and documents to:

TREPAC
Attn: Andrea Friedman
P.O. Box 2246
Austin, TX 78768-2246
afriedman@texasrealtors.com

Updated 05.12.2022

Inventory of alcoholic beverages to be auctioned

Please note that the temporary permit will be limited to this listed inventory; items not listed may not be auctioned.

			Donor Information					
Beverage Type	Beverage Size	Fair Market Value (FMV)	First Name	Last Name	Address	City	State	Zip

REFERENCE

The one-third rule

1. What is the "one-third rule" and when does it apply?

Federal law, and most state laws, permit associations to use general treasury money (i.e., dues) to pay for certain TREPAC fundraising1, thereby allowing associations to save more of their TREPAC funds to use for advocacy. Associations can use their treasury money to pay for TREPAC event-related food, beverage, venue, and administrative costs. Notably, though, these expenses do not include entertainment or anything else intended to entice TREPAC investments, such as auction items, gifts, entertainment, or party favors valued at more than $20 each. These entertainment or enticement expenses must be paid out of TREPAC funds unless the association applies the "one-third rule."

2. What is the reason for the one-third rule?

The one-third rule is intended to prevent a corporation from giving contributors prizes, merchandise, or entertainment at events like dinner-dances, auctions, and the like "in exchange" for voluntary individual political contributions. Since an incorporated board of REALTORS® may use corporate monies to pay the costs of conducting an TREPAC fundraising event, such an exchange might appear to occur if the prizes or entertainment provided to TREPAC investors had approximately the same value as the total contributions made by those individuals in attendance.

Thus, the rule prevents the sponsor from providing to contributors prizes or entertainment in exchange for personal PAC contributions where the total amount contributed does not significantly exceed the value of the prizes or entertainment. The rule accomplishes this by establishing a threshold relationship between costs incurred in connection with the event and total contributions made by those in attendance.

3. How does the one-third rule work?

The one-third rule says the association may pay part of the entertainment and enticement costs from its treasury1 as long as the amount paid is equal to or less than one-third of the total amount raised at the TREPAC event. For example: Your association is hosting a TREPAC event with three items for auction (a relaxing massage, a dinner at a local restaurant, and a salon visit) and pays a total of $400 for all three items out of the association treasury. The auction raises $1,200 for TREPAC, which is three times the amount paid by the association. Therefore, the association does not need to use TREPAC funds to reimburse the association treasury1. Had the auction raised only $900, then the associations could only fund $300 of the auction items and the PAC would need to reimburse the association treasury for the difference, or $100.

By following these rules, you can do your part in ensuring TREPAC's continued success.

Some exceptions may apply if the local association has a local property tax exemption.

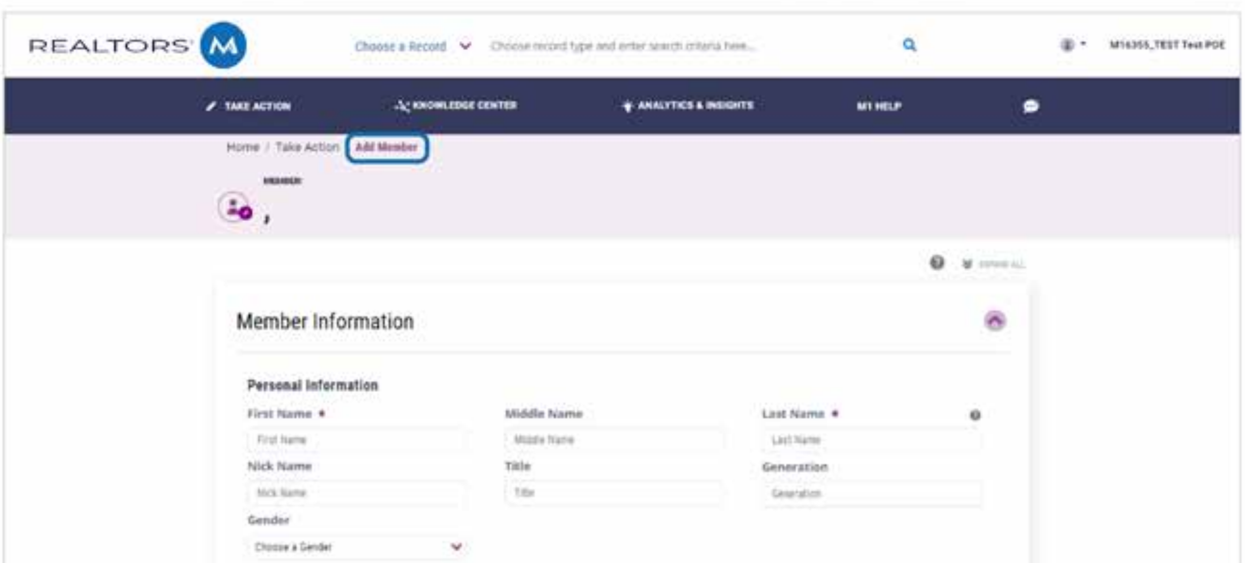
Sources: Federal Election Commission 11 CFR 114.5(b)(2), National Association of REALTORS®, and Texas REALTORS®

Adding new members

NAR Members First
Create New Member Quick Reference Card

Accessing the Add Member Screen

From the Home Page, click **Take Action** > **Add Member**, or tap the **Create New Member** tile to open the **Add Member** screen.



Adding new members

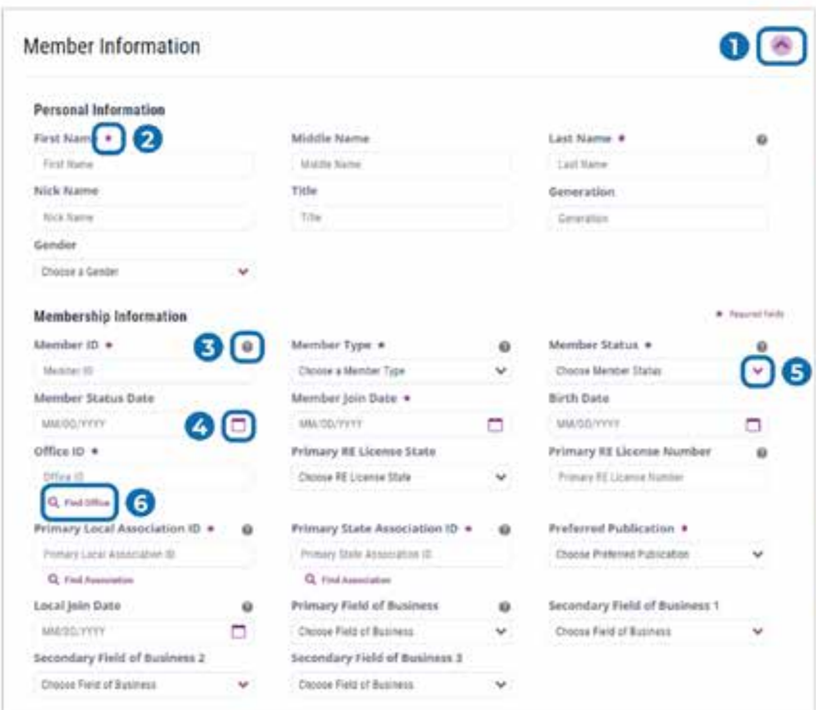
Completing the Member Information Screen

The procedure for adding new members has changed in M1, but the purpose and policies have not. This screen consists of three sections that you can collapse and expand: Member Information, Contact Information, and Additional Member Information. This QRC covers Member Information and Contact Information, but note that the process is the same for all sections.

Member Information

When completing this section, keep the following in mind:

- M1 checks for duplicate records based on Member ID.
- When using the Find Office lookup feature, always be sure to select an active office.
- M1 verifies that the format of the license number you enter matches the format for the state selected.



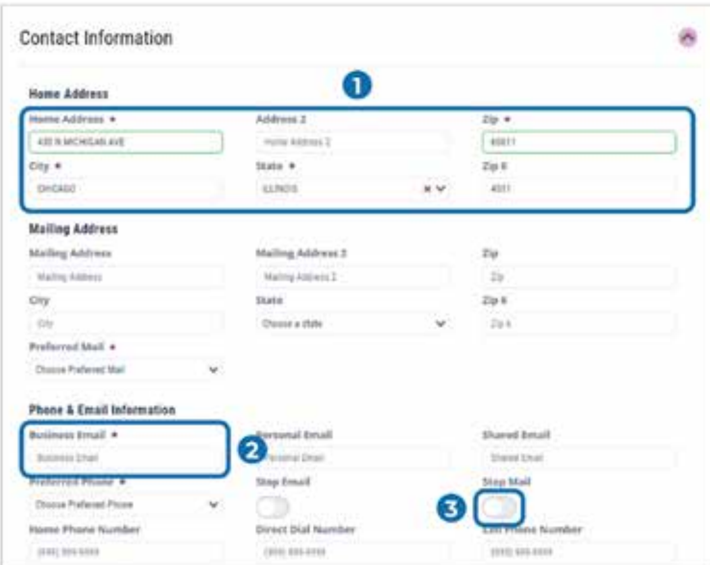
1. Click the **accordions** to collapse/expand sections.
2. At minimum, complete the **required fields** which are marked with an asterisk.

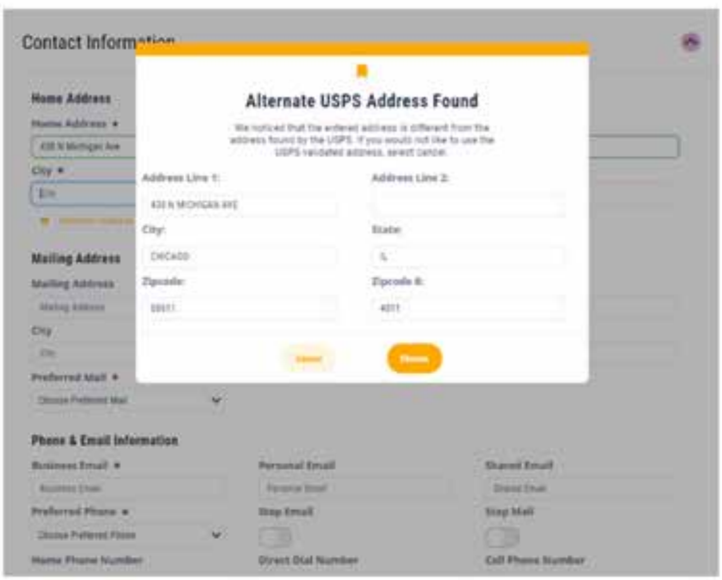
   Note: *The Member Type you select triggers which fields are required.*
3. For more information on a field, click the **question mark** to view pop-up Help.
4. Tap to select a **date**.
5. Click the **drop-down arrow** to make your selection.
6. Tap the magnifying glass icon to use the **lookup feature**.

Adding new members

Contact Information

When completing this section, keep the following in mind:





1. When you enter the member's Home Address and Zip, press **Tab**. M1 will suggest a USPS-validated address. (See additional screen below for address auto-generation.)
2. When you enter an email address into **Business Email**, M1 will not allow duplicates. M1 also sends an automatic email to the member to verify the address.
3. Tap the **toggle button** to turn a field on/off.

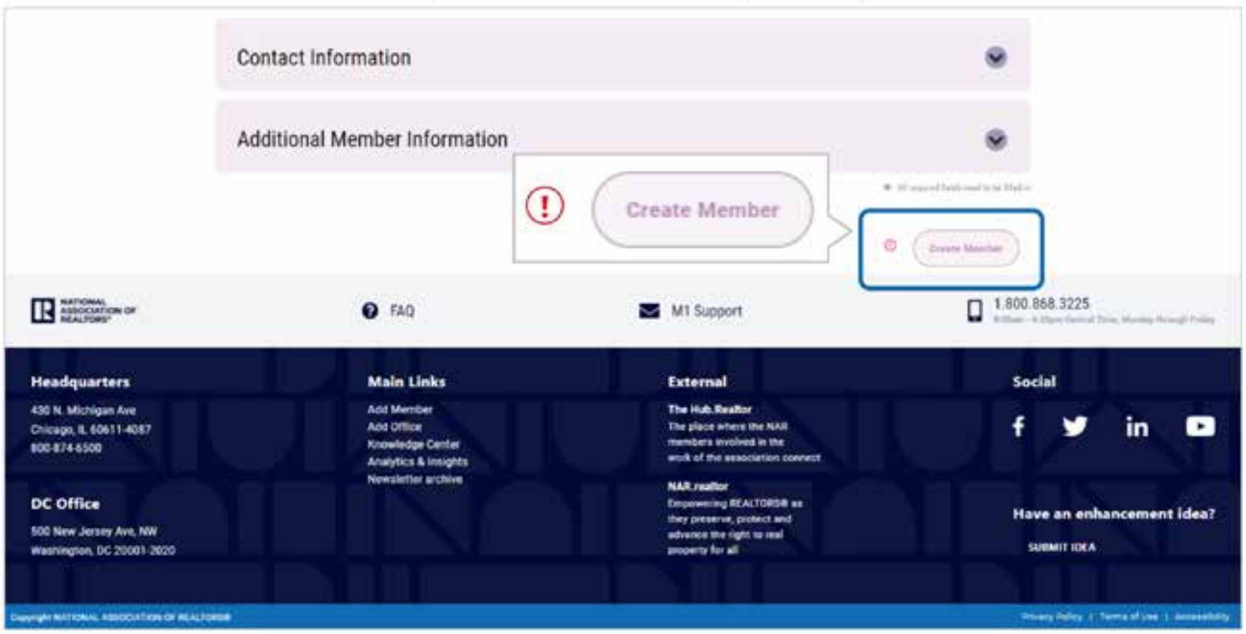
Adding new members

Submitting the Member's Information

When you are finished entering all the new member's information in each section, the **Create Member** button will be clickable. If it is not, the member information is incomplete.

The alert lets you know there is a problem. Hover over or click the alert, and M1 will let you know where the error is. As soon as the error is corrected, the Create Member button will become clickable.

When **Create Member** is available, click the button to complete the process.

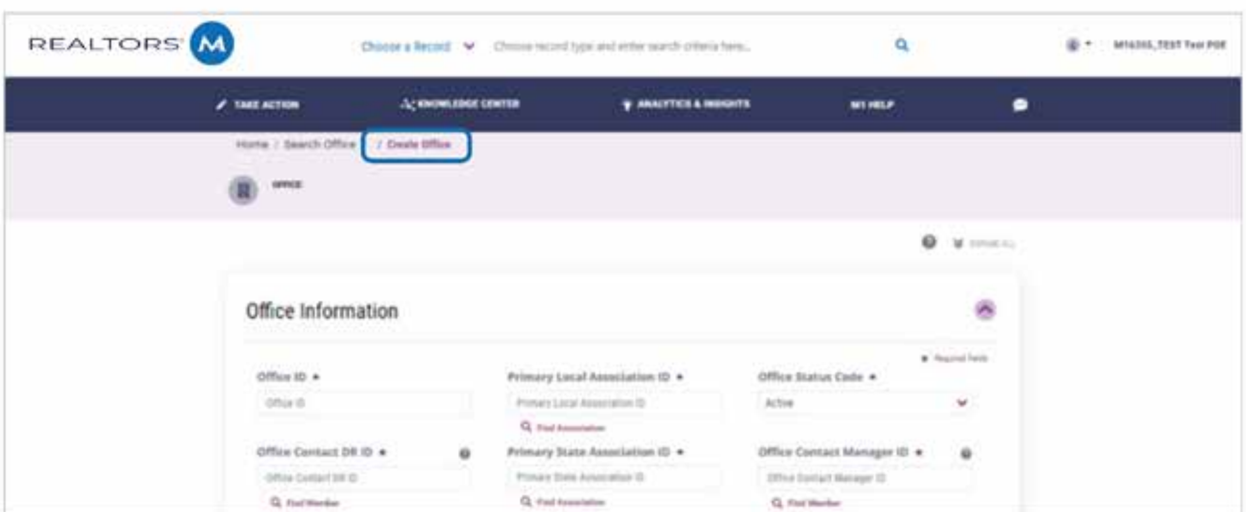


Adding a new firm record

NAR Members First
Create New Office Quick Reference Card

Accessing the Create Office Screen

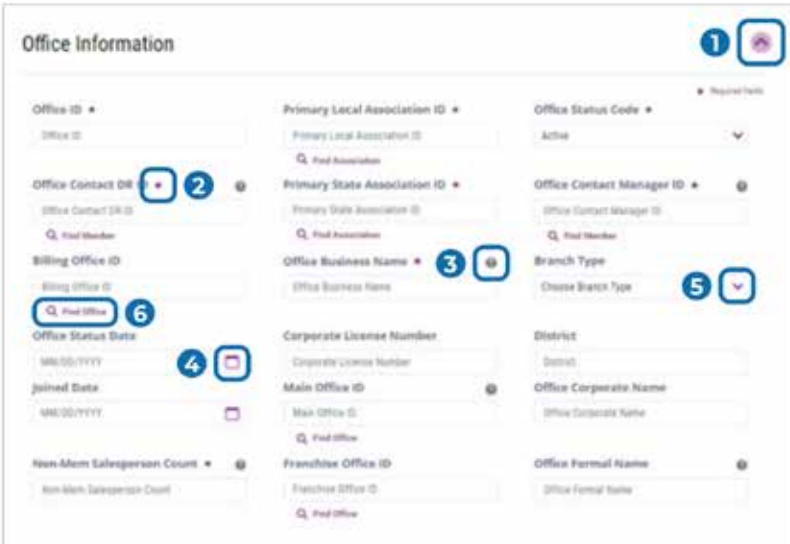
From the Home Page, click **Take Action** > **Add Office**, or tap the **Create New Office** tile to open the **Create Office** screen.



Adding a new firm record

Completing the Office Information Screen

The procedure for adding new offices has changed in M1, but the purpose and policies have not. This screen consists of three sections that you can collapse and expand: Office Information, Contact Information, and Additional Office Information. In this QRC, we only show Office Information, but the process is the same for all sections.



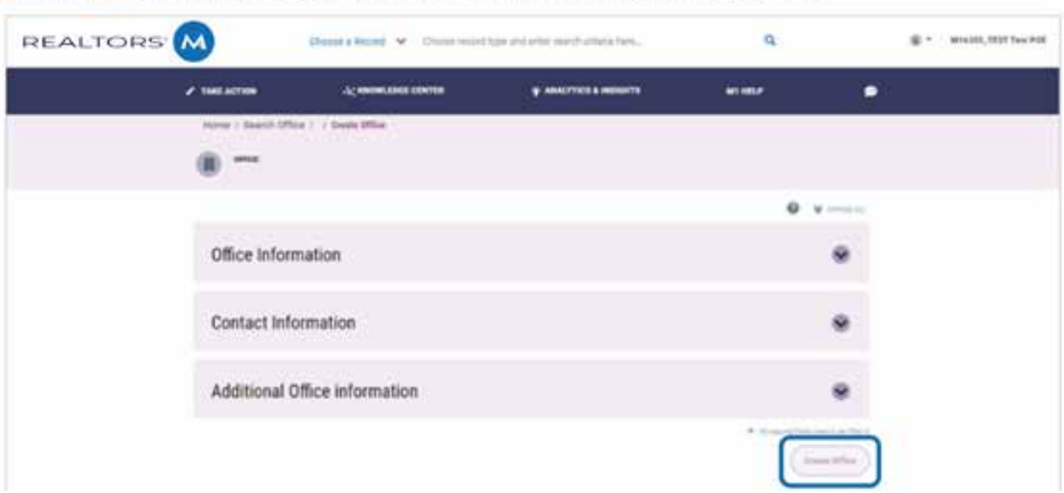
1. Click the accordions to **collapse/expand** sections.
2. At minimum, complete the **required fields** which are marked with an asterisk.
3. For more information on a field, click the **question mark** to view pop-up Help.
4. Tap to select a **date**.
5. Click the **drop-down arrow** to make your selection.
6. Tap the **magnifying glass** icon to use the lookup feature.

Submitting the New Office Information

When you are finished entering all the new office information in each section, the **Create Office** button will be clickable. If it is not, the office information is incomplete.

The alert lets you know there is a problem. Hover over or click the alert, and M1 will let you know where the error is. As soon as the error is corrected, the Create Member button will become clickable.

When **Create Office** is available, tap the button to complete the process.



REFERENCE

Acronyms and terms

ABR Accredited Buyer Representative, an NAR certification for buyer representation.

ADF Applicant data form, used to submit qualifications for RCE designation.

AE Association executive, An association's top staff executive. See EO.

AEC Association Executives Committee, a committee that makes recommendations on behalf of AEs. AEI Association Executives Institute, the premier professional development event for local and state REALTOR® association staff held annually by the National Association of REALTORS®.

AEI Association Executives Institute, an annual NAR education conference for AEs

Affiliate A class of membership in a local (or state) association) for those involved in the real estate industry interested in board membership (e.g., bankers, attorneys, real estate appraisers, etc.); they are not members of NAR but may be added to M1 (NRDS).

AHWD At Home With Diversity®, a certification offered by NAR focusing on working successfully with people in a multicultural real estate market

ALC Accredited Land Consultant, a land brokerage designation awarded by the REALTORS® Land Institute

ALD Association Leadership Development, name of NAR team under MXEL that focuses on programming for association staff.

Alliance LGBTQ+ Real Estate Alliance, an all-inclusive and all-embracing organization founded in 2020 acting as a leading advocate in real estate and housing policy, working on behalf of all LGBTQ+ people and their housing needs

AOR Association of REALTORS®

ARAM Advanced REALTOR® Association Management, an advanced self-study program for AEs, available from NAR.

AREAA Asian Real Estate Association of America, a nonprofit professional trade organization founded in 2003 dedicated to promoting sustainable home ownership opportunities in Asian American communities

ARELLO Association of Real Estate License Law Officials

ASAE American Society of Association Executives

Block R The trademarked "R" design denoting REALTOR®, with specific requirements for its placement and use.

BOD Board of Directors

BOLC Board Officers Leadership Conference, held annually in October now referred to as the Texas REALTORS® Party and Leadership Summit.

BOR Board of REALTORS®

REFERENCE

CAE Certified Association Executive, a designation awarded by ASAE.

C2EX Commitment to Excellence, an endorsement that empowers REALTORS® to evaluate, enhance and showcase their highest levels of professionalism (not a course, class, or designation)

CCIM Certified Commercial Investment Member, a designation awarded by the CCIM Institute.

CE Continuing Education, required by all real estate licensing commissions (note: CE requirements vary by state)

CEAM NAR's Code of Ethics and Arbitration Manual, provides administrative guidance to local and state associations for handling ethics complaints, arbitration requests, and mediation requests

CIE Commercial Information Exchange, a database for sharing information about commercial real property for sale or lease (note: While CIEs are generally REALTOR® association-owned, a CIE is not an MLS)

CIPS Certified International Property Specialist, an NAR designation focused on international real estate.

CMLS Commercial Multiple Listing Service

COE REALTOR® Code of Ethics.

CFR Campaign Finance Reform, rules/laws that impact PAC contributions.

CPM® Certified Property Manager, a designation awarded by Institute of Real Estate Management.

C-RETS Certified Real Estate Team Specialist, a certification awarded by the Real Estate Business Institute or REBI (previously called the Council of Real Estate Brokerage Managers)

CRB Certified Real Estate Brokerage Manager, a designation awarded by the Council of R.E. Brokerage Managers.

CRE® Counselor of Real Estate®, a designation offered by the Counselors of Real Estate

CREA Canadian Real Estate Association, the national association in Canada (CREA members are also called REALTORS® but are not NAR members)

CRD Center for REALTOR® Development, NAR's on-line education portal

CRS Certified Residential Specialist, a designation awarded by the Council of Residential Specialists

Crystal R Investor at $2,500 level; may include lower amounts in recurring years

CSRE Center for Specialized REALTOR® Education

D&O Directors and officers' insurance, another term used to describe professional liability insurance for associations

DEI Diversity, Equity, and Inclusion

Delegate Representative on NAR's Delegate Body who casts votes based on the number of primary members in the Board for proposed changes to the NAR Constitution or one of the Articles of the NAR Code of Ethics

DR Designated REALTOR®, the principal broker (or appraiser) in the real estate firm with responsibility for non-member dues assessments under the DR dues formula and for professional standards matters (e.g., arbitration and mediation)

E&O Errors and omissions insurance, professional liability insurance for associations

EO Executive officer, an association's top staff executive. See AE

REFERENCE

ePOE e-commerce point of entry, a status within NRDS allowing e-commerce capabilities for records

e-PRO A technology certification provided by NAR EVP Executive vice president, a staff title within an association

EVP Executive Vice President, a title for the association chief staff executive, similar to CEO

FMV Fair market value, probable price at which a willing buyer will buy from a willing seller

FPC Federal political coordinator, a liaison to a member of Congress for NAR (formerly FSC/FDC)

GAA General Accredited Appraiser, an appraisal designation offered by NAR

GAD Governmental affairs director, state/ Local association staff member who provides guidance in the areas of government affairs, political affairs, legislative or regulatory affairs, lobbying, advocacy, PAC fundraising, community outreach and/or REALTOR® Party initiatives

Golden R Investor at $5,000 level, may include lower amounts in recurring years

GREEN Green designation, offered by NAR's Green Resource Council

GRI Graduate, REALTOR® Institute, an NAR designation awarded at state association level

HOP Housing Opportunities Program, NAR effort for affordable housing HOPE Homeownership Participation for Everyone, NAR awards given for minority homeownership programs

IA or IAM Institute Affiliate Member, a commercial real estate designee who pays a reduced fee for limited NAR membership (e.g., CCIM, CRE, IREM, RLI, SIOR)

IDX Information data exchange, agreement by firms in MLS to advertise each other's listings on firm websites

INS Internal News Service, a regular weekly email publication from NAR

IREM Institute of Real Estate Management, a commercial affiliate of NAR

ISC Institutes, societies, and councils, used to collectively describe organizations with specific relationship to NAR

IT Information technology, another term used for NAR CRT division, or reference to the information function

LFRO Limited function referral office, a company licensed for the sole purpose of providing referrals to another firm

M1 National REALTOR® Database System (now called M1), NAR's centralized membership database with specific rules and guidelines

Magel William R. Magel Award of Excellence, an NAR award presented annually to a paid local, state, or regional MLS association chief staff officer for outstanding contributions

Marks Collective term for registered trademarks of NAR

MI Major investor, a PAC investor of $1,000+ annually

MIC Major Investor Council Member, REALTOR® member in charge of Major Investor and President's Circle recruitment for the state

MBM Multi-board management. The multi-board associations don't house local staff; therefore, Texas REALTORS® serves the members.

MLS Multiple listing service

REFERENCE

MRP Military Relocation Professional, a certification offered by REBAC for working with current and former military service members

MVP Member Value Plus reward program for members and associations to take NAR or REALTOR® Benefit specific actions during a period of time in order to earn a free reward

MXEL NAR's Member Experience, Engagement and Legal Affairs group

NAR National Association of REALTORS®

NAGLREP National Association of Gay and Lesbian Real Estate Professionals, founded in 2007, NAGLREP advocates on behalf of the rights of the Lesbian, Gay, Bisexual, and Transgender (LGBT) community as it relates to housing and discrimination laws

NAHREP National Association of Hispanic Real Estate Professionals, NAHREP's mission is to advance sustainable Hispanic home ownership by educating and empowering the real estate professionals who serve Hispanic home buyers and sellers

NAREB National Association of Real Estate Brokers, formed in 1947 by chartered African American real estate professionals seeking equal housing rights

NARLA NAR Leadership Academy, the academy identifies, inspires and mentors emerging leaders from the local and state level

NCA National Commercial Awards, an NAR recognition program that honors REALTORS® who received an award or recognition for their exceptional service and contributions to the commercial real estate industry

NRDS National REALTOR® Database System (now called M1), NAR's centralized membership database with specific rules and guidelines launched in 1998

PAC political action committee, a political committee organized for the purpose of raising and disbursing money to elect and/or defeat candidates

PAG Presidential Advisory Group, appointed by the NAR President to address issues that may not fall within the jurisdiction of a standing committee or to address an issue that may be time sensitive

PC President's Circle, an RPAC Major Investor who contributes an additional $2,000 separately and directly to select RPAC-recommended federal candidates

PIC Political Involvement Committee

Platinum R Investor at $10,000 level (which includes $5,000 to sustain in subsequent years)

PMN Performance Management Network, designation offered by WCR (PMN replaced WCR's LTG designation)

POE Point of entry, a status within NAR M1 allowing data entry to certain fields in membership records

PS Professional standards, the specific process for resolving arbitration and ethics complaints; duty of members.

PSA Pricing Strategy Advisor, an NAR certification for enhancing skills for pricing property (PSA replaced the BPOR certification)

RAA Residential Accredited Appraiser, an appraisal designation offered by NAR

RAE REALTOR® Association Executive magazine, an NAR publication for AEs

RAM REALTOR® Association Management, a self-study program for AEs, available from NAR

REFERENCE

RARE REALTOR® Association Resource Exchange, virtual library of sample association documents donated by AEs

RCE REALTOR® Association Certified Executive, a NAR designation for REALTOR® association executives

REALTOR® A trademarked term denoting membership in the National Association of REALTORS®; not a generic term

REBAC Real Estate Buyer Agent Council, an affiliate of NAR that maintains the ABR designation

REBI Real Estate Business Institute, an NAR affiliate (previously called the Council of Real Estate Brokerage Managers)

REI Real Estate Investing, a certification program offered by the Residential Real Estate Council for REALTORS® working with investors and those who are establishing themselves as real estate investors

RENE Real Estate Negotiation Expert, a certification awarded by the Real Estate Business Institute or REBI

RLI REALTORS® Land Institute, an affiliate of NAR that focuses on farm and ranch brokerage transactions

RLMTE REALTORS® Legislative Meetings and Trade Expo, held in Washington, DC, in May (annual meeting previously called the NAR Midyear Legislative Meetings)

ROTY REALTOR® of the Year

RPAC REALTORS® Political Action Committee, NAR's PAC

RRC Residential Real Estate Council (previously called the Council of Residential Specialists, CRS)

RPMIC REALTOR® Party Member Involvement Committee, NAR's grassroots contact system

RSPS Resort & Second-Home Property Specialist, a certification offered by NAR

SFR® Short Sales & Foreclosure Resource®, a certification offered by NAR

SIOR Society of Industrial and Office REALTORS®, a commercial affiliate of NAR

SRES® Seniors Real Estate Specialist®, an NAR designation offered by the SRES® Council focusing on working with clients age 50+ (previously offered by the California Association of REALTORS®)

SRS Seller Representative Specialist, a designation awarded by the Real Estate Business Institute or REBI

Sterling R Annual TREPAC investor at the $1,000 level

TREC Texas Real Estate Commission, state licensing and regulatory agency

TREPAC Texas REALTORS® Political Action Committee (TREPAC)

VOW Virtual office website, a real estate firm practicing brokerage on the Internet (includes advertising in some state laws)

WCR Women's Council of REALTORS®, an affiliate of NAR offering the PMN designation, primarily for women and open to men

YPN Young Professionals Network, a dynamic entry point for real estate professionals striving to become more successful in their careers and gain leadership experience Sources: National Association of REALTORS®, Texas REALTORS®

Sources: **National Association of REALTORS®, Texas REALTORS®**

Trustees and PAC Chairs

The Trustee and local PAC Chair positions are vital to the success of TREPAC. The trustees and PAC chairs work together to accomplish the goals and objectives of TREPAC. This summary explains the main job duties for each position.

TREPAC Trustee

Elected by the TREPAC body. Trustees may serve a two-year term.

- Oversee all TREPAC operations and financial disbursements
- Attend all mandatory state and national meetings
- Attend and speak at as many local TREPAC and GA events as possible
- Know their elected representative at all levels of government and be knowledgeable about legislative issues
- Participate in local association's candidate interview process
- Approve statewide TREPAC candidate contributions as well as sign and coordinate check presentations to local candidates
- Submit monthly reports on activities taking place at local associations in their regions
- Review each local association's business plan in their regions throughout year to track progress toward TREPAC goals
- Develop a close working relationship with their PAC Chairs. PAC Chairs help the trustees meet their goals and responsibilities
- Educate, educate, educate.

PAC Chair

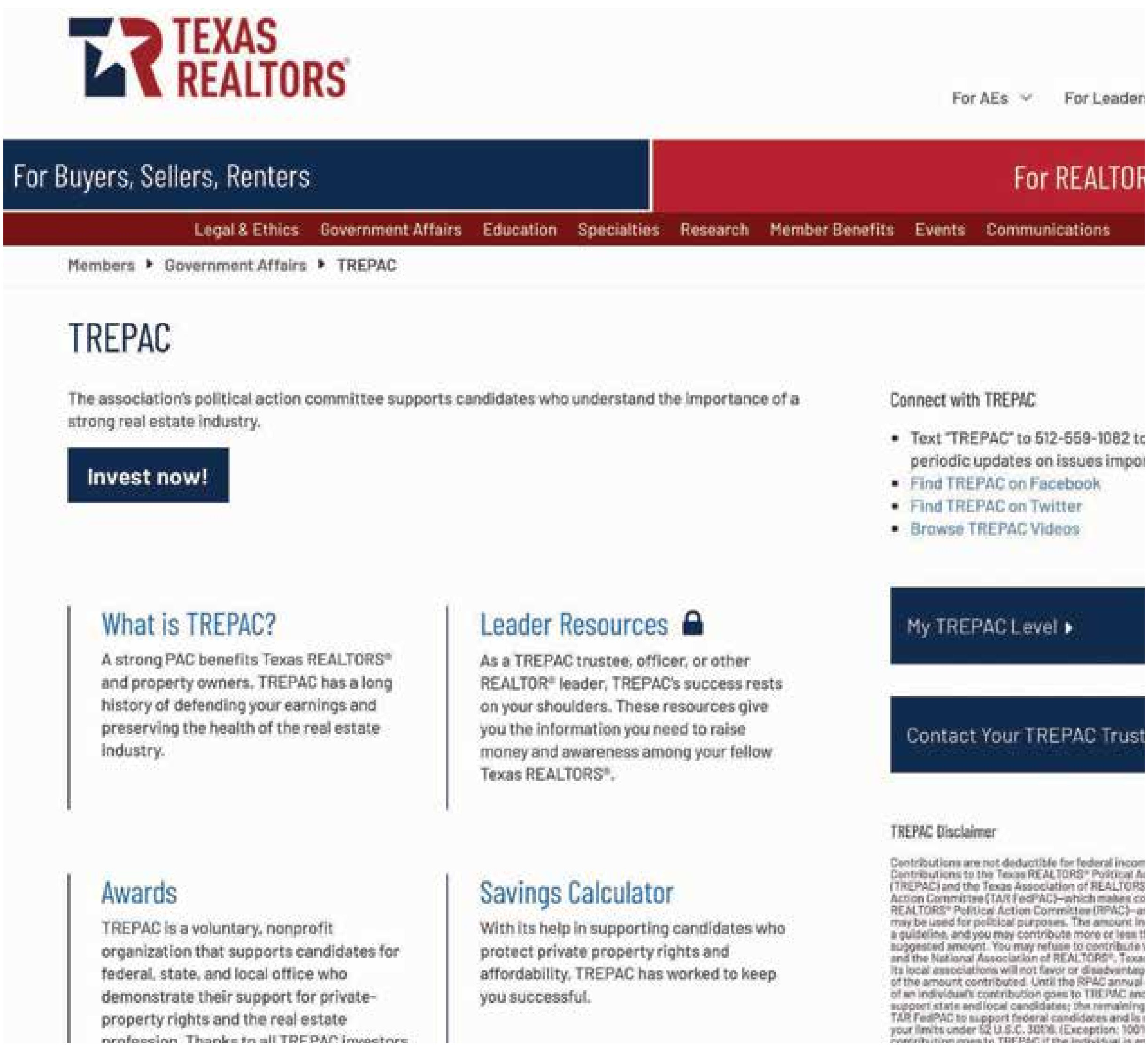
Appointed by the local AE or GAD, PAC Chairs serve as chair of their local TREPAC committee.

- Promote the TREPAC mission and goals within the association membership
- Know the issues and be able to educate others about what's at stake
- Work with their AE or GAD and trustee to set fundraising goals for the year
- Oversee all TREPAC fundraising activities for their local association
- Track and monitor the annual business plan throughout the year to assess progress toward TREPAC goals
- Recruit volunteers to help coordinate education and fundraising events to spread the TREPAC message and raise money
- Attend the annual Texas REALTORS® Party and Leadership Summit meeting, Texas REALTORS® Winter Meeting, Texas REALTORS® annual conference, and the biannual REALTOR® Day at the Texas Capitol
- Develop a close working relationship with their TREPAC trustee. The trustee is a key resource for the PAC chair
- Work with local governmental affairs committee to collaborate messaging.★

Web resources

For TREPAC Leaders

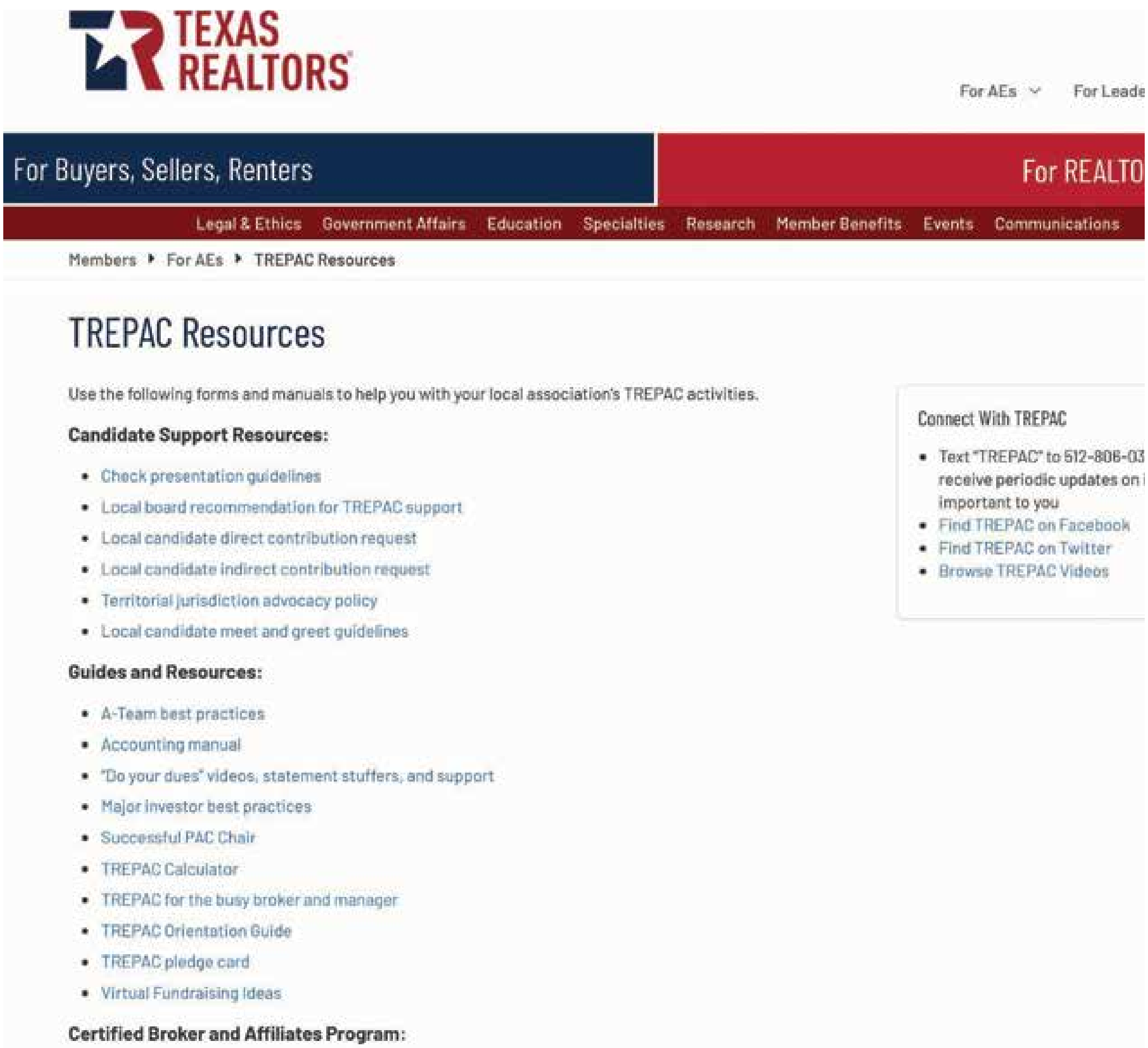
The Leaders Resources section includes valuable TREPAC information from candidate support forms, information guides and more. Here, you can learn more about TREPAC and find many of the forms useful to advance TREPAC's fundraising and grassroots advocacy.



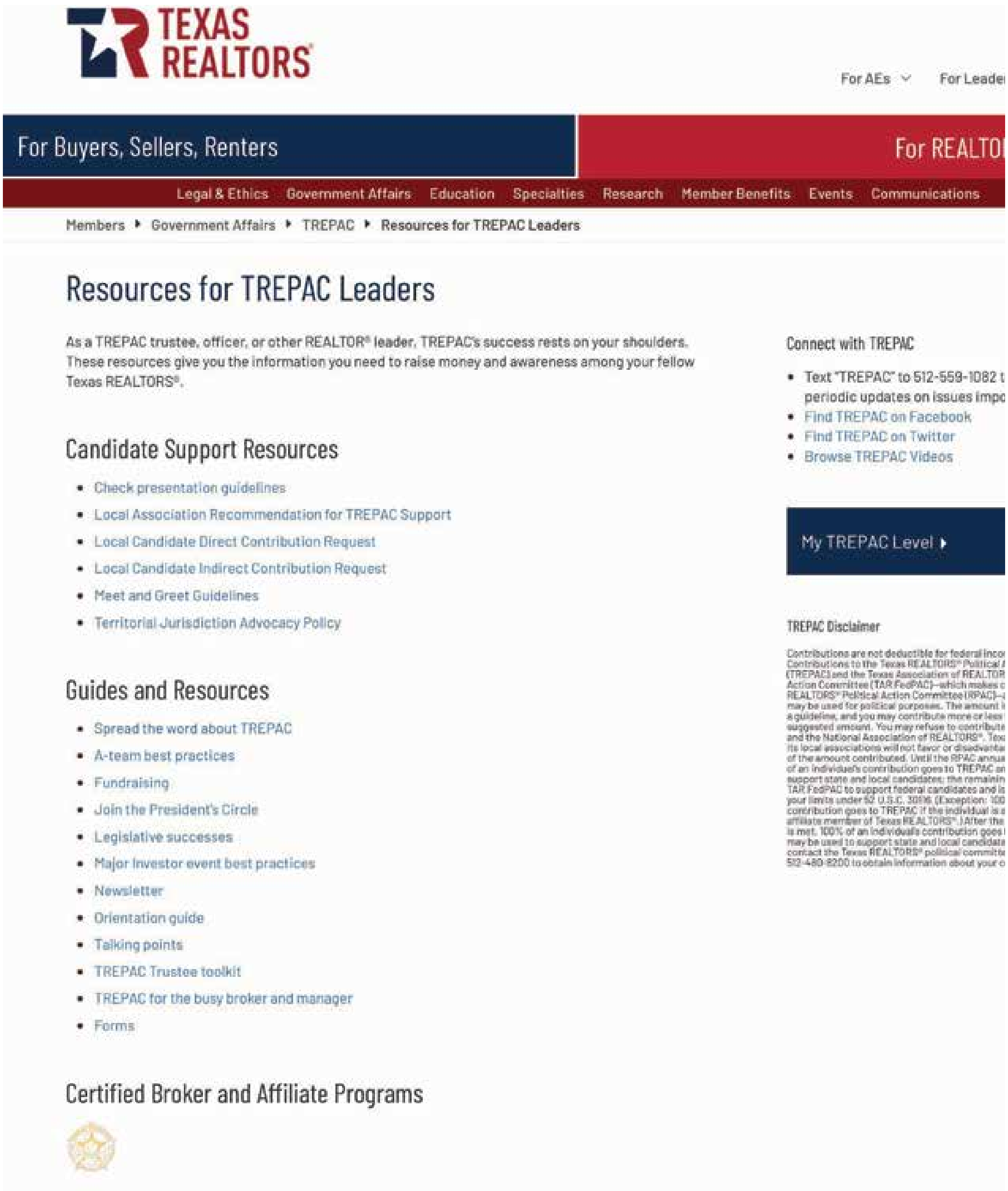
Web resources

For Association Executives

Find TREPAC materials in the For AEs section. Along with an array of useful information, this accounting manual is available for download in the TREPAC Resources page.

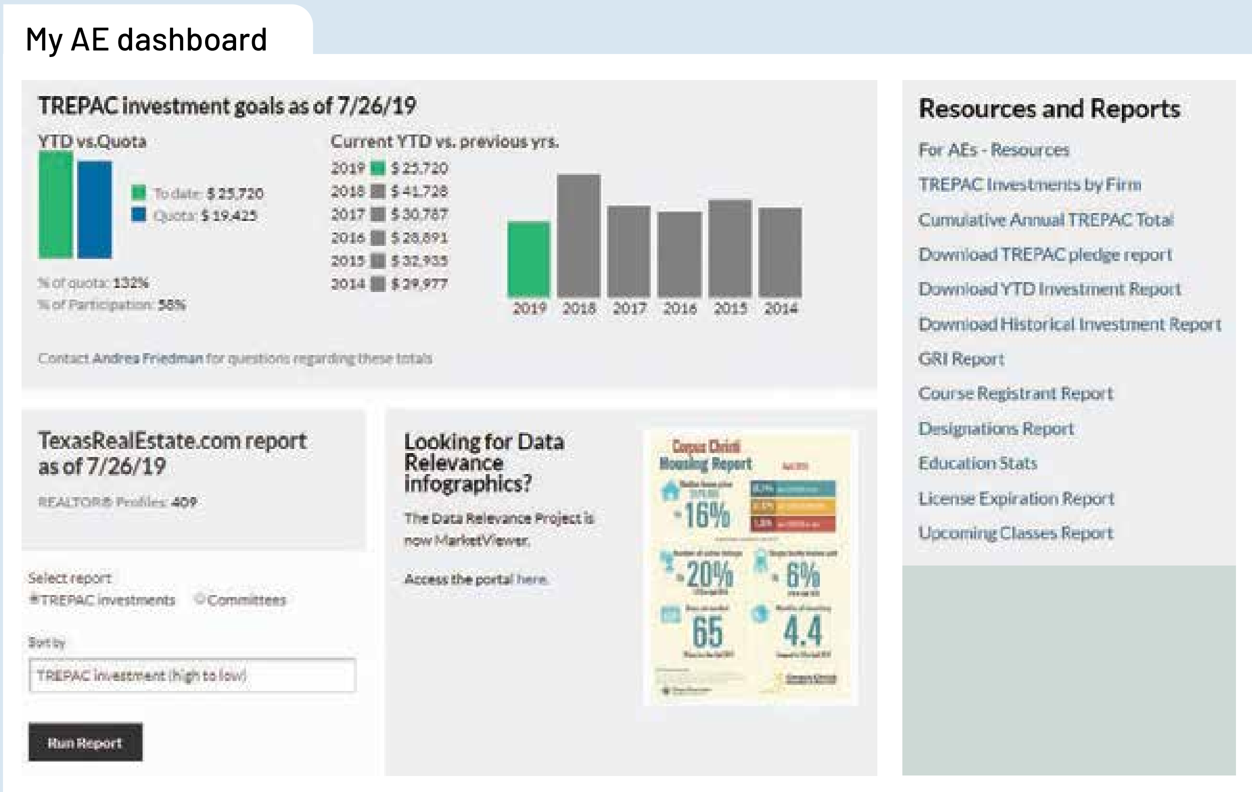


Web resources



What does My AE dashboard do?

The AE dashboard gives association executives in Texas a quick glance at key metrics showing your members' current participation in TREPAC.



Where do I find it?

To access your AE dashboard from any page on TexasRealEstate.com, click your name at the top of the page, and then select *Apps*, and *My AE dashboard*.

What will it show me?

My AE dashboard displays the following:

- **TREPAC:** View current individual and association-wide investment totals.
- **TREPAC:** See the percentage needed to reach your association's TREPAC goal.
- **Ability to review and download** detailed TREPAC fundraising reports.
- **Sort members by:** Highest and lowest TREPAC investors in your membership. Also by Texas REALTORS® committees.
- **MarketViewer:** A real estate market analytics portal that provides instant access to market stats across thousands of geographies in Texas as well as other valuable data points on apartment rents and vacancies, new construction and mortgage rates.
- **Member look-up:** Search for any of your members by first and/or last name. Quickly see who has and hasn't uploaded a personal photo to TexasRealEstate.com.
- **Forms library:** Quick links to important Texas REALTORS® forms for local associations.
- **Assign** staff members and/or volunteer REALTORS® access to AE dashboard.

What kind of enhancements will it have in the future?

Future versions of My AE dashboard may include:

- Educator look-up, by qualifications.
- Register your members online for Texas REALTORS® Winter Meeting and Conference.

Square Card Reader

STEP 1—ACCEPT TREPAC'S INVITATION

- Users will receive an e-mail invitation from Square.
- Follow the e-mail instructions to create your own unique log in credentials
  User ID = your preferred e-mail address (not already associated with an existing Square acccount)

STEP 2—DOWNLOAD SQUARE POINT OF SALE-POS

- from the iTunes App Store or Google Play
- Once the application has been installed, you are now ready to accept payments.

STEP 3—SIGN IN

- Use the email address and password used to set-up your TREPAC Trustee Square account when you received your invitation to accept payments for TREPAC.

STEP 4—PROCESSING PAYMENTS

- Open the app on your smartphone by tapping the Square Register icon Sign in with the email address and password associated with your TREPAC
- Trustee square account. Plug the Square Reader into the 3.5mm smartphone headset audio jack.

STEP 5—PROCESSING PAYMENTS

- Enter the TREPAC investment amount using the keypad on the primary payment screen
- **Important Step:** Add note to identify member making the investment

STEP 6—PROCESSING PAYMENTS

- Swipe the card quickly and smoothly through the reader. The magnetic strip should black face the thick end of the reader
- Have the member sign with their finger

STEP 7—PROCESSING PAYMENTS

- **Important:** Enter first and last name followed by the individual's six-digit TREC license number.
- Failure to add proper investor information at the time of payment acceptance will result in a refund of the transaction.

STEP 8—PROCESSING PAYMENTS

- You will see a final screen that reads "Thanks! How would you like your receipt?" From this screen, input the member's e-mail address or cell phone number to deliver a receipt.
- You will see a final "You're all done." Screen after the payment completes.

TABC ALCOHOL GUIDELINES

Before you say "Cheers" ...

If your association is planning an auction to benefit TREPAC that includes alcoholic beverages (wine basket, cooler with beer, etc.), you need a permit. Texas REALTORS® was instrumental in the passage of a lwas effective Sept. 1, 2017 that allows organizations—including political action committees—to include alcohol in their auctions as long as they hold a certail permit from the Texas Alcoholic Beverage Commission.

Here's how to ensure your event is in compliance.

Step 1: Plan your auction

Review the "Legal Aspects" section of the Orientation Guide to ensure your event is legally compliant. Plan ahead—TREPAC must receive your request for approval at least 15 business days before the event.

Step 2: Collect donations items

Local board staff received auction item(s) that include beer, wine, and/or spirits.

Step 3: Complete the paperwork

Complete the Request for Temporary Permit to Auction Alcohol at **TexasRealEstate.com/tabc.**

Note: Gift cards to a store specializing in the sale of beer, wine, and/or spirits do not need to be included in the inventory.

Step 4: Send form to TREPAC ASAP

Send the complete form, inventory, and other required documents to TREPAC staff at least 15 business days before the event to allow time for processing.

Step 5: TREPAC reviews form

TREPAC will review your documents and apply for a permit from your local Texas Alcoholic Beverage Commission (TABC) office. The permit fee will be deducted from your board's available TREPAC-Corporate allocation.

Step 6: TABC issues permit

The local TABC office issues a Temporary Auction Permit for the planned TREPAC auction.

Step 7: Display permit

The Temporary Auction Permit should be displayed at the event along with any required signs.

CONNECT THE DOTS...
...FROM TREPAC TO YOU

See how your TREPAC investment is your direct link to public policies that protect Texas real estate.

1 EDUCATE

Texas REALTORS® need to know about issues affecting private-property rights and the real estate industry.

2 INVEST

Texas REALTORS® invest in TREPAC to protect your livelihood and industry.

3 INTERVIEW

Local REALTORS® interview candidates for elected office and send support recommendations to the TREPAC Trustees.

4 DISBURSE

TREPAC Trustees approve disbursements to pro-real estate candidates running for office.

5 VOTE

Texas REALTORS® vote for TREPAC-supported candidates at the local, state, and national levels.

6 ELECT

TREPAC-supported candidates are elected to office.

7 PROTECT

Texas REALTORS® educate officeholders on real estate-related issues to ensure they support the passage of pro-real estate public policies.

TREPAC.com