



THE COUNSELORS
OF REAL ESTATE®
Request for Qualifications

The Counselors of Real Estate welcomes your interest in membership in the organization. This Request for Qualifications (RFQ) is an important part of the application process and we encourage your questions. If there are any parts of the RFQ that you would like clarified, please call the Counselor organization's national office at 312-329-8427 for guidance and/or referral to a Counselor to assist you. Visit cre.org/become-a-member/application-process to apply.

THE SUBMISSION OF THE *REQUEST FOR QUALIFICATIONS* SHOULD NOT BE CONSTRUED AS ENSURING AN INVITATION TO BECOME A MEMBER OF THE COUNSELORS OF REAL ESTATE. BEFORE SUBMISSION WE STRONGLY ENCOURAGE YOU TO REACH OUT TO OTHERS, ESPECIALLY YOUR PEERS AND OTHER COUNSELORS, TO ASSIST YOU IN THE PREPARATION OF YOUR RESPONSE. ONCE SUBMITTED, **THE RFQ IS MAINTAINED AS HIGHLY CONFIDENTIAL** BY THE COUNSELORS FOR ITS USE IN THE INVITATION PROCESS AND AS OTHERWISE NECESSARY.

Personal

1. NAME:
2. NAME OF FIRM:
3. POSITION/TITLE:
4. BUSINESS ADDRESS:
CITY/STATE/ZIP:
COUNTRY:
PHONE:
MOBILE:
EMAIL ADDRESS:
WEBSITE:
LINKEDIN ADDRESS:
5. RESIDENCE ADDRESS:
CITY/STATE/ZIP:
COUNTRY:
PHONE:
6. BIRTHDATE (MM/DD/YYYY):

7. CIVIC AND CHARITABLE ACTIVITIES (Please list the names of the organizations, any leadership positions held and the nature of your involvement):
8. PERSONAL INTERESTS, SKILLS AND HOBBIES:

Education/Professional

9. COLLEGE OR UNIVERSITY EDUCATION:
- A. Name of College:
 - B. Location – City: State: Country:
 - C. Number of Years in Attendance: Year of Graduation:
 - D. Degree: Honors:
10. GRADUATE SCHOOL(If applicable):
- A. Name of Graduate School:
 - B. Location – City: State: Country:
 - C. Number of Years in Attendance: Year of Graduation:
 - D. Degree: Honors:
11. ADDITIONAL GRADUATE DEGREES, EDUCATION, OR TRAINING (If applicable):
(Please briefly list the educational institution, description of education or training, hours/weeks/years of the program, year of completion and degree or certification (if applicable) for each additional education or training experience).
12. NATIONAL ASSOCIATION OF REALTORS MEMBER: Yes No
- MEMBER OF: BOARD OF REALTORS
- If invited to CRE membership, you will be required to affiliate with the National Association of Realtors if you are a resident of The United States or one of its territories (several options are available to satisfy this requirement). Do you agree to satisfy this responsibility of membership if invited? Yes No
13. REAL ESTATE OR OTHER PROFESSIONAL DESIGNATIONS YOU HAVE BEEN AWARDED AND THE DATES ACHIEVED AS WELL AS MEMBERSHIPS, AFFILIATIONS, HONORS AND ANY RELATED LEADERSHIP POSITIONS HELD:
(In addition, please list any other real estate professional groups and organizations you have been a member of, and if not a current member, please identify the approximate time period during which you were involved.)
14. PROFESSIONAL LICENSURE OR CERTIFICATIONS:
15. INDUSTRY ACTIVITIES:

(Please list here, or in a referenced attachment, relevant industry activities including work on task forces and collaborations addressing industry issues, advisory boards, editorial positions, specialty practice activities, non-profit leadership, education/teaching involvement and any other activities that demonstrate leadership and eminence in the industry.)

16. SPEECHES, PUBLICATIONS, AND INDUSTRY OUTREACH (if any):

(Please list here, or in a referenced attachment, relevant speeches, published materials, or other industry outreach activities (blogs, social media, columns, newsletters, etc.) you have generated with appropriate detail on topic, audience and timing)

Counselor References

17. List the names of members of The Counselors of Real Estate, if any, that The Counselors might contact in considering your qualifications.

Professional Experience

(For some of the questions stated below, a reasonable estimate or assessment is acceptable)

18. A. Number of years of experience in real estate:
B. Number of years that have involved significant real estate counseling activities:
19. Describe your employment history including job titles and responsibilities from the time you started working in the real estate industry.

(List each firm's name, term of employment, address, telephone number, and the name of a reference (if still available given the passage of time). Provide complete descriptions of your previous and current activities in each company (where applicable) that illustrate your background and ability as a real estate counselor. Use a separate sheet if necessary. Submission of a CV is strongly encouraged. Please explain any gaps in employment. Also provide any additional information or a listing of professional experience that you think illustrates your background and ability as a real estate counselor.)

20. What do you consider to be your primary field(s) of expertise (i.e. finance, law, architecture, brokerage, management, appraisal, development)?
21. Geographically, where do you do your counseling work?
22. Do you provide counseling services on an assignment basis or for a "single client" such as an employer?
23. What interests you about membership in The Counselors of Real Estate?
24. The Counselors of Real Estate requires three years of real estate counseling experience to be eligible for membership. Please explain how your professional experience meets this requirement.

(Beyond the traditional delivery of counsel in the form of meetings, reports, and work product, examples may include (a) critical decisions made in running real estate businesses, (b) managing a real estate portfolio, (c) conducting real estate investment analyses, (d) assisting in major technology/business system decisions affecting real estate, or (e) serving employers or clients in other ways. It is important that you articulate how your professional experience rises to the level of rigorous, independent, high quality advice that is the hallmark of The Counselors of Real Estate.)

25. A. How many significant real estate related counseling assignments/projects did you perform during the past 3 years?

(We recognize that your work may include sole responsibility for a few assignments, supervisory responsibility for a larger number, or on-going responsibility for many key decisions affecting your business or that of a client or employer. You may wish to elaborate regarding the nature of your work.)

Counseling Work

26. Please provide the names and contact information (mailing and email addresses) of employers or clients for whom you have provided real estate counseling services, whom The Counselors might contact as professional references. This information may be provided on a separate sheet.
27. Provide examples of three types of counseling assignments/projects you have completed and consider significant, and if desired, one additional assignment of special interest. It is important that these projects/assignments represent strong examples of your real estate counseling experience for which you can clearly discuss and articulate your role and responsibilities during your personal interview. These should include A) an assignment that is typical of your work B) an assignment that is complex; C) an assignment that may be less complex but still demonstrates your expertise; and D) if desired, an assignment/project of special interest. You are encouraged to submit assignments that have been completed in the last five years.

While we understand that the nature of some candidate's work may not closely fit the descriptions above, please make an effort to identify assignments/projects that you can fully discuss at the time of your interview. Candidates should be able to answer the questions identified below clearly and in sufficient detail to enable your interviewer to verify the assignment and form a judgment about what it says about your qualifications and real estate counseling experience.

In addition to the information you provide for the assignments/projects in #31A-D below, please be prepared to provide evidence of the output of the assignment/project which could include a written report, hard copy or electronic files, or key letters or memos, etc. which can be reviewed by your interviewer along with your verbal responses to fundamental questions such as those listed below. We are looking for backup to support the wisdom and judgment of your recommendations and the expertise they demonstrate. This information must also be made available to the CRE who conducts your personal interview. **Note: At this stage of our process, we want only the answers to questions on this form. Do not send copies of electronic or hard copy files with the completed RFQ form. The CRE assigned to conduct your personal interview will review those documents during the course of the interview.**

Please address the following questions as you describe each assignment/project (as applicable):

- A. What was the key purpose of the assignment/project?
- B. Please describe how you obtained the assignment/project? When was it obtained and completed? Did you assist in specifying the scope of the assignment/project?
- C. How many people were involved in the completion of the assignment/project? What was your role?
- D. Can you describe the process (in some detail) of how you completed the assignment/project? This should address the following:
- How did you go about finding, creating, collecting data? What were the associated challenges?
 - What analytic methods and approaches did you use? (frameworks, models, special methods of your specialty area, etc.)

- How were your research, data collection and analysis documented? (If little or no documentation of findings and conclusions exists, you need to be able to explain why and be able to justify both in writing and verbally during your interview that the assignment meets Counselor standards.)
- E. What did you find as the biggest challenge in this engagement and how did you resolve this difficulty or challenge?
- F. How did your counsel significantly affect a subsequent real estate decision.

27 A. ASSIGNMENT/PROJECT 1 (TYPICAL) – EMPLOYER/CLIENT:

APPROXIMATE DATE OF ASSIGNMENT

WRITTEN NARRATIVE ORAL LETTER MEMO OTHER _____

CONTACT PERSON: PHONE NUMBER:

CITY/STATE/COUNTRY: YEAR COMPLETED:

TYPE OF REPORT:

TYPE OF ISSUE INVOLVED:

DESCRIBE ASSIGNMENT AND RATIONALE FOR IT (THE PURPOSE, THE PROBLEM):

COUNSEL GIVEN:

BASIS FOR ADVICE:

OUTCOME:

HOW DID YOUR COUNSELING IMPACT YOUR EMPLOYER'S/CLIENT'S REAL ESTATE DECISION(S)?

OTHER INFORMATION ABOUT THE ASSIGNMENT YOU WISH TO SHARE:

27. B. **ASSIGNMENT/PROJECT 2 (COMPLEX)** – EMPLOYER/CLIENT:

APPROXIMATE DATE OF ASSIGNMENT

WRITTEN NARRATIVE ORAL LETTER MEMO OTHER _____

CONTACT PERSON: PHONE NUMBER:

CITY/STATE/COUNTRY: YEAR COMPLETED:

TYPE OF REPORT:

TYPE OF ISSUE INVOLVED:

DESCRIBE ASSIGNMENT AND RATIONALE FOR IT (THE PURPOSE, THE PROBLEM):

COUNSEL GIVEN:

BASIS FOR ADVICE:

OUTCOME:

HOW DID YOUR COUNSELING IMPACT YOUR EMPLOYER'S/CLIENT'S REAL ESTATE DECISION(S)?

OTHER INFORMATION ABOUT THE ASSIGNMENT YOU WISH TO SHARE:

27. C. **ASSIGNMENT/PROJECT 3 (LESS COMPLEX)** – EMPLOYER/CLIENT:

APPROXIMATE DATE OF ASSIGNMENT

WRITTEN NARRATIVE ORAL LETTER MEMO OTHER _____

CONTACT PERSON: PHONE NUMBER:

CITY/STATE/COUNTRY: YEAR COMPLETED:

TYPE OF REPORT:

TYPE OF ISSUE INVOLVED:

DESCRIBE ASSIGNMENT AND RATIONALE FOR IT (THE PURPOSE, THE PROBLEM):

COUNSEL GIVEN:

BASIS FOR ADVICE:

OUTCOME:

HOW DID YOUR COUNSELING IMPACT YOUR EMPLOYER'S/CLIENT'S REAL ESTATE DECISION(S)?

OTHER INFORMATION ABOUT THE ASSIGNMENT YOU WISH TO SHARE:

27. D. **ASSIGNMENT/PROJECT 4 (VOLUNTARY: AN ADDITIONAL ASSIGNMENT OF SPECIAL INTEREST) – EMPLOYER/CLIENT:**

APPROXIMATE DATE OF ASSIGNMENT

WRITTEN NARRATIVE ORAL LETTER MEMO OTHER _____

CONTACT PERSON: PHONE NUMBER:

CITY/STATE/COUNTRY: YEAR COMPLETED:

TYPE OF REPORT:

TYPE OF ISSUE INVOLVED:

DESCRIBE ASSIGNMENT AND RATIONALE FOR IT (THE PURPOSE, THE PROBLEM):

COUNSEL GIVEN:

BASIS FOR ADVICE:

OUTCOME:

HOW DID YOUR COUNSELING IMPACT YOUR EMPLOYER'S/CLIENT'S REAL ESTATE DECISION(S)?

OTHER INFORMATION ABOUT THE ASSIGNMENT YOU WISH TO SHARE:

(Print this form. Please sign and date.)

AGREEMENT

28 I, _____, the undersigned, do hereby submit this information incidental to the consideration of an invitation to membership in THE COUNSELORS OF REAL ESTATE.

In consideration of reviewing my possible invitation as a member of The Counselors of Real Estate (The Counselors), I agree and represent that:

- A. All the information provided by me is complete and correct to the best of my knowledge and belief and if additional information is needed, I will supply it, and I authorize you to conduct such additional investigation as The Counselors deems necessary or appropriate.
- B. On behalf of myself, my heirs, executors, assigns and successors, I waive and release all claims, demands and actions that I or them now or may in the future have against The Counselors, its officers, directors, members, agents, employees, chapters and affiliated organizations including but not limited to any act or omission in granting or denying membership in The Counselors or in censoring, suspending, expelling or terminating my membership in The Counselors.
- C. I acknowledge and accept that The Counselors of Real Estate, as an organization of professionals, has the duty, responsibility and authority to consider nominees for membership based upon information received by it regardless of the source, and that I shall have no right to review or challenge such information regardless of its source, and that I release, hold harmless and shall indemnify The Counselors and its members, and I shall not assert any claim whatsoever against any source for information provided, whether oral or written, and that I agree such information shall be deemed privileged and confidential.
- D. 1) I have not been found guilty or pleaded no contest in a criminal action.
 Correct See attached statement*
**(If you select "see attached statement," outline the details on a separate sheet marked Exhibit D-1).*
- 2) I have not been found guilty, liable, nor agreed to an out of court settlement of a civil action.
 Correct See attached statement*
**(If you select "see attached statement," outline the details on a separate sheet marked Exhibit D-2).*
- 3) I have not been denied a real estate license for actions or omissions involving real estate.
 Correct See attached statement*
**(If you select "see attached statement," outline the details on a separate sheet marked Exhibit D-3).*
- 4) I have not been denied appraisal certification, a contractor's license or any other professional certification or licensure for which I have applied nor lost a previously held license or certification on any other than a voluntary basis.
 Correct See attached statement*
**(If you select "see attached statement," outline the details on a separate sheet marked Exhibit D-4).*
- 5) There are no outstanding judgments, lawsuits, bankruptcy or receivership actions pending against me nor any other form of material challenge to my character or integrity as of this date.
 Correct See attached statement*
**(If you select "see attached statement," outline the details on a separate sheet marked Exhibit D-5).*
- 6) I have not been subject to any disciplinary action from a licensing, credentialing, or regulatory agency.
 Correct See attached statement*
**(If you select "see attached statement," outline the details on a separate sheet marked Exhibit D-6).*
- E. I acknowledge and represent that I do not discriminate against any individual in my business dealings on the basis of any presently recognized area of discrimination under federal, state or local law.

It is agreed that any certificate, emblem, or other evidence of membership in The Counselors which may be issued to me, shall at all times remain the property of The Counselors, held by me in trust, and will be returned to The Counselors upon demand by its Board of Directors if and when for any reason my membership in The Counselors is terminated.

I have received and read copies of the Bylaws, Code of Ethics, Standards of Professional Practice, and International Ethics Standards. If invited to membership, I shall conduct my activities in accordance with these and the rules of the National Association of REALTORS as they are now or as they may be amended.

The Counselors may, at its discretion, without reason or cause disclosed to me, reject or decline membership to me.

Signed _____ Dated _____

All applicants must sign the Request for Qualifications prior to submission to The Counselors of Real Estate. Original, faxed, or authentic electronic signatures are acceptable.

THE SUBMISSION OF THIS FORM SHOULD NOT BE CONSTRUED AS ENSURING AN INVITATION TO BECOME A MEMBER OF THE COUNSELORS OF REAL ESTATE.