



**Lessons from the Field: 5 Brokers /50 Minutes &
OREF Forms Library/ Resources to Sell Throughout Oregon**
OREF Panel Presentation: OAR State Convention
Marriott—Portland Waterfront
Wednesday, October 4, 3:15 p.m. – 4:45 p.m.

3:15 p.m. – 3:40 p.m. Welcome and Overview of presentation: risk management & quality forms

- **OREF’s sale agreements & Other Transactional/Advisory Forms**
- **2017 form committee work activities & CE resources** to guide brokerages and brokers
 - # 000 Guide / Index & # 001 Matrix -Great Resources for all
- **Statewide Uniformity** of the 70 + OREF Forms transactional and advisory Library.
- Addressing **FIRPTA in the real estate transaction**; risk management and liability mitigation.
- **Overview of the five presenters**; providing forms usage experiences and lessons learned from subscribers in the Portland metro, Central Oregon, Willamette Valley, Eugene/Lane County & S. Oregon.

Here’s Why You Must Attend this Session! Hear from your peers and colleagues about their real estate journey, lessons learned. **These five brokers will share with you with ten minutes each**, lessons from the field.

3:40 p.m. – 4:30 p.m. Hear from five OAR members / OREF Subscribers Throughout the State

Speakers: 10 minutes each/50 minutes total

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| Richard Caplan | Portland Metro: <u>HOA’s / Planned Communities, Historic registered properties, property investment and top trigger issues</u> Principal Brokers are seeing in brokers administering best possible transactions. Understanding home owner associations and planned communities is critical in today’s real estate market. Learn more about the guidance documents and recommended usage of the HOA (form # 024, Condominium/Townhouse Addendum) & Historic Property Addendum (# 045). |
| Wendy Adkisson | Central Oregon: <u>Ranch/Agricultural & Recreational Properties</u> Best utilization resources to agricultural clients includes key OREF forms and guidance recommendations: Farms/Ranches RE Sale Agreement, Vacant Land Sale Agreement & Well / On-Site Sewage Addenda. |
| George Grabenhorst | Salem: <u>Commercial Markets, Government Properties, Other Non-Residential Niche Markets</u> Commercial Sales form usage, other legal documents and resources commercial property brokers may use in Oregon sales. |
| Marie Due | Diverse and Unique Lane County Properties —Urban Eugene, McKenzie River and Coastal Residential sales vary throughout Lane County. When to represent? When to give referral? |
| Colin Mullane | Southern Oregon: Colin will share how the <u>Seller Carry Finance suite of forms</u> (Forms # 32 - 38) have become heavily used in Southern, Central and the Oregon Coast by OREF subscribers. |

4:30 – 4:45 p.m. Q and A

Panel Co-Facilitated by Steve Russell of Windermere Stellar, 2017 Forms Committee Chairman, and Phil Querin of Q-Law, OREF, LLC Forms Committee Legal Counsel.