

Oregon Real Estate Forms, LLC, a 22 year-old Oregon Limited Liability Corporation owned by Portland Metropolitan (50%), Eugene Association (30%) and Oregon Association Realtors® (20%), provides 13,500 + Oregon Realtors and licensees, as well as Oregon licensed attorneys with the 70 + realty transactional and advisory forms.

Over the past 10 years, OREF has advanced significant subscriber benefits; these are above and beyond the value of the quality 70 + realty transactional and advisory forms.



Staffing and Offices

OREF, LLC is professionally managed by a Chief Executive Officer, Director of Forms Development and Subscriber Services and a Controller / Director of Operations. OREF's professional office currently resides within the Portland Metropolitan Association Realtors® offices in SW Portland.

Leadership Cultivation and an Eye Towards the Future

Annually, OREF Board leadership and staff partner with a synergistic approach of advancing past, present and future leadership with an annual planning session with both the Forms Committee leadership, staff and FC legal counsel. And, much is the same with the Board of Director leadership; the officers, staff and corporate counsel plan the upcoming year and provide guidance to upcoming Board meetings.

Forms Committee

The OREF Forms Committee is comprised of nine broker appointees from the three Association owners, as well as past committee chairperson (ex-officio, non-voting), a title escrow industry representative (ex-officio, non-voting) and is supported by the Forms Committee legal counsel and Forms Committee liaison (Director of Forms Development and Subscriber Services). The committee meets six times a year between February - September to work on the forms development activities (existing review and creation of new forms).

Forms Summary (Nov. 21) Posted on orefonline.com, Forms Changes Link

Annually, the Forms Committee legal counsel prepares a Forms Summary to accompany the future year's Oregon Forms Library. This Summary is posted to the OREF website around November 21. And, the Oregon Forms Library goes live on the zipLogix zipForm software platform on December 28.

Forms Changes Seminars/Webinars: Continuing Education for OREF Subscribers

OREF has advance seminars and webinars (RVAR, EAR, COAR, Mid-Valley, PMAR webinar and OAR webinar in November / December) and then a dozen Realtor® Associations partner with OREF with the delivery of the January Forms Changes seminars / webinars.

OREF Exhibits & Sponsors & Provides CE & Panel Presentation at OAR State Convention

Annually, OREF exhibits and is a sponsor at the OAR State Convention.

OREF, LLC also provides a 90-minute panel presentation; topic(s) are always affiliated with the current year's Oregon Forms Library. The 90-minute video is recorded and posted on the OREF website, Resources link page. [Log on to orefonline.com](http://orefonline.com).

Board of Managers

The OREF Board of Managers is comprised of ten (10) board members appointed by the three owners; five (5) appointees from PMAR, three (3) from EAR and two (2) from OAR. These three-year staggered terms are vetted by the three Associations incoming Association President and their CEO. Realtor® members wishing to be appointed can submit a letter of interest to the CEO by May of every given year. Appointments are usually made by September. The Board meets quarterly and leadership includes Chairperson, Chair-Elect and Treasurer.

Mission

OREF's mission is to provide quality forms to our members and as a "for profit" limited liability corporation build revenue for our three Realtor® Association members of PMAR, EAR and OAR. The owners utilize the non-dues revenue to supplement their annual operating budgets and mission of serving their respective Realtor® memberships.

NARRATIVE HIGHLIGHTS

Subscription Sales: Enrollments and Renewals

OREF staff is here to assist the OREF subscribers with the annual electronic subscription enrollment and renewal. OREF is here Monday – Friday, 9:00 a.m. – 5:00 p.m. Subscribers needing assistance are always encouraged to contact OREF first before additional customer service calls to zipLogix.



Customer Service: Enrollment, Renewals and Technical Support

Both OREF and zipLogix provide our OREF subscribers customer service. Whether enrollment, renewal and/or technical support, OREF is here to assist you and expedite your timely access to your Oregon Real Estate Forms Library.



Payment Processing: OREF Now Takes Payment at orefonline.com

In 2018, the OREF board leadership asked staff and corporate counsel to bring the payment processing in-house through the OREF website. After 10 years of zipLogix handling payment processing and subscription enrollment / renewal provisioning, OREF collaborated with zipLogix and our website design firm to implement the transition in Q4 2018 and on January 7, 2019 launched the two -part process. <https://orefonline.com/wp-content/uploads/2019/01/User-Directions-originating-in-OREF-v4.pdf>



Continuing Education: on-line curriculum, January Forms Changes seminars / webinars and zipTMS® zipForm® Usage Training

OREF is pleased to provide 10 + hours of annual continuing education to provide OREF subscribers with value-added information, education and training:

- Five on-line course curriculum / six (6) CE credits—OREF -OnlineEd:
 - <https://orefonline.com/events/oref-onlineed/>
- Annual Forms Changes seminars / webinars (November / December seminars / webinars with PMAR, OAR, EAR, Mid-Valley and Rogue Valley Associations.
- Annual Forms Changes seminars and webinars—January 2019.
- OAR Convention—OREF Panel Presentation (90-minute, 1.5 CE with OAR providing CE certificate)
- zipTMS® zipForm® Usage Training Sessions (beginner, intermediate, advanced and brokerage / multi-user account).
 - In Oregon, there are a half dozen zipTMS instructors. OREF is working with the local Realtor® Associations to pursue more trainers for local and regional support to OREF subscribers / Realtor® members. https://orefonline.com/wp-content/uploads/2018/11/OREF-Training-Promotional-Flyer-11_8_18_CMM.jpg



OREF Web Site Resources: orefonline.com

Oregon Real Estate Forms, LLC developed our new website three years ago and in Q4 2108, OREF, LLC completed a website refresh to meet the needs of our subscribers.

There is a host of information, training and educational resources on the website. Log on to orefonline.com today and glean the latest information.



OREF has two (2) e-news including *Principal Broker Quarterly* (4x a year) and *Subscriber Update* (6x a year). Log on to OREF, LLC and click on the Resources / News links to preview the previous four issues.

