

**NATIONAL
TRUST REAL ESTATE
ASSOCIATION, INC.**

Member Guide

National Trust Real Estate Association, Inc.

Summary

National Trust Real Estate Association, Inc. (NTREA) was founded in 1973. It is a not-for-profit organization designed as an education and information resource for the trust real estate industry. Membership is restricted to trust real estate professionals.

NTREA provides formal educational programs via the NTREA Educational / Development Forum. This program features both outside speakers and members presenting on a variety of fiduciary topics related to both trust and real estate activities. In addition, members actively participate in “Share and Compare” sessions. These sessions provide a resource to discuss issues currently facing NTREA members.

A number of members hold professional designations from real estate and fiduciary institutes including CPM, CCIM, CRE, and MAI designations from institutes of the National Association of Realtors, as well as the Building Owners and Managers International’s RPA, the Institute of Certified Bankers’ CTFA, the Association for Investment Management and Research’s CFA, and the American Institute of Certified Public Accountants’ CPA. Continuing education credits for attending NTREA Conferences may be available to these members in the future.

NTREA communicates with its members through e-mail and through the web site www.ntrea.org

Inquiries may be addressed to:

National Trust Real Estate Association, Inc.
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E-mail: jmoore@ntrea.org

Additional information is available on our web site www.ntrea.org

Governance

NTREA is incorporated in the State of Wisconsin. A Board of Directors directs the ongoing operations of the association, and organizes the annual conference. NTREA has a paid, part-time Executive Director who handles the administrative

and financial activities of the association. Copies of the Corporate By-Laws are available from the Executive Director, upon request.

The 2009-2010 Officers and Committee Chairpersons are listed below:

President:	Argirios P. Ragias
Vice President:	Jay Bowman, Regions Morgan Keegan Trust
Treasurer:	Terence Walsh: M&I Trust Company
Secretary:	Joellen Sandt, Burke & Herbert Bank & Trust Co.
Audit Chair:	Mimi Stauffer, The Glenmede Trust Company
Membership:	Dan Woolley
Resource Chair:	Janet Keefer, USTrust/Bank of America
Friends of NTREA Chair:	Donald Sack, U.S. Bank
Past President:	Caroline Thompson, Wachovia Bank
Executive Director:	Jeanne Moore, Charlotte, NC

Membership Information

Membership is restricted to real estate professionals who are employed by or who own firms that hold title to real estate assets in a fiduciary capacity.

NTREA has two primary membership categories, Individual and Corporate. **Individual membership** contains two sub classifications:

- Active Members, who have met all the membership requirements
- Emeritus Members, who have retired from their careers, and who meet requirements for that status.

Both classifications enjoy equal benefits, except that only Active Members may vote at the Annual Membership Meeting.

Corporate Membership is available to any corporate fiduciary that has multiple individual NTREA members. Corporate membership allows the corporation to designate individual trust real estate professionals as members, and provides savings on annual dues for its individual members. Individual members under a corporate membership program enjoy all the benefits of regular individual members.

Friends of NTREA is a separate relationship category created for a select number of firms that provide products and services to NTREA members. Membership is by invitation only. Friends attend the annual forum, display products and services at the forum, and receive billing on the NTREA web site www.ntrea.org

Friends of NTREA provide significant financial support to the annual forum .
NTREA encourages its members to use products and services offered by Friends of NTREA.

Annual Dues are assessed to all members and friends of NTREA. The current individual membership dues are \$100.00. Corporate members currently pay \$900.00. Friends of NTREA pay \$2,000.00.

NTREA Web Site

NTREA maintains a web-site at www.ntrea.org where information regarding NTREA is published as well as educational articles. A **Business Link Page** provides links to related organizations and businesses.

The web site features a **Members Only Page**. This page contains a continuously updated **Membership Directory** and **Friends of NTREA** listing. Members can access this page through their own personal user name and password supplied at the time of membership acceptance.

There is also a **Job Posting** section. Firms can list job openings, and individuals may list "Opportunities Wanted" on the same page. Responses and inquiries may be made through the Executive Director to maintain privacy, if preferred.

Educational Resources

NTREA's primary goal is to be an educational resource for its members. This goal is achieved through three different channels, the annual forum, e-mails, and online through the web site.

NTREA Educational/Development Forum is our organization's main event and a high focus is placed on educational programs. We stress the importance of attending these forums. Our Board of Directors and the Edu / Dev Forum Host develop an agenda that features a full slate of fellow members and outside experts presenting on a wide range of topics. Attendees can concentrate on the subject matter without the distractions of their regular responsibilities. Most speakers provide printed copies of their presentation, which can be shared with colleagues after the forum. Equally important are the **Share & Compare Sessions**, in which members both obtain and provide solutions to specific problems from their colleagues in informal discussions. Many attendees find these sessions to be the most valuable part of the conference.

NTREA provides specific educational material on the **NTREA web site**. Summaries of conference presentations, real estate market updates, and emerging legislation that affects our industry will be featured. This medium will be particularly helpful for those Members who do not attend the Educational/Development Forum.

NTREA is an ongoing Networking Resource

A major benefit from NTREA membership is the opportunity to network with fellow trust real estate professionals. The Educational/Development Forum provides the most direct opportunity, but networking can be a year-round resource. Knowing someone to call about a property or a particular issue that a member has expertise in can make a world of difference in problem solving. Our members have a history of helping each other - a resource that money can't buy.

Some of the best year-round networking can develop for members who volunteer to serve on NTREA standing committees. Serving on a committee does not require a lot of time, but it is a great way to learn how NTREA operates and to make a contribution to this industry. Please contact Jeanne Moore at jmoore@ntrea.org if you are interested.

If you enjoy your membership as much as all other members do, please think about asking other real estate professionals to join NTREA.