



SOCIETY OF INDUSTRIAL AND OFFICE REALTORS®
Application for Membership
Specialist, Industrial and Office Real Estate (SIOR) Designation

Application Process:

SIOR's admissions procedure, conducted pursuant to the terms of SIOR's Bylaws, seeks to assure that applicants for all classes of membership are fully and fairly evaluated in terms of qualification criteria stated in the Bylaws and Policy Manual. Membership will be conferred upon all persons demonstrating achievement of the applicable criteria; and no applicant will be admitted on any other basis. Review the current admissions criteria on SIOR's website, www.sior.com.

SIOR conducts a structured process, involving application and credential review at both the local (chapter) and (inter)national levels. Once an application has been completed, it should be forwarded, along with all required documents, to the Admissions Department at SIOR's Washington office (see below for address). A copy of the application will be forwarded to the applicable Chapter Admissions Chair (or Regional Director if no chapter jurisdiction applies) for review. Chapter review includes a personal interview, this process can take up to 30 days.

Once the chapter completes its interview, the Manager of Admissions will evaluate the application. Applications that do not clearly meet the requirements will be sent to the Admissions Committee for review and recommendation. The Manager of Admissions or Admissions Committee may request additional information relevant to an applicant's qualifications. The Manager of Admissions or Admissions Committee examines all relevant materials and makes a recommendation to the Council of Chapter Presidents concerning further action. They may recommend that applications be approved, approved subject to the fulfillment of educational requirements and/or ethics training, disapproved, or postponed pending the receipt of additional factual information or an interpretation of the Bylaws. The Council of Chapter Presidents takes final action on the recommendations of the Manager of Admissions and/or Admissions Committee. Applications are approved throughout the year.

The Manager of Admissions notifies applicants of the results of their applications following each review.

Application Instructions:

- 1) Review all relevant requirements for membership, including the Bylaws Excerpts regarding membership, Code of Ethical Principles and Standards of Professional Practice, volume requirements, and educational requirements. All are available on SIOR's website, www.sior.com/ at Membership > Requirements > SIOR Designation. Questions about requirements should be directed to the Manager of Admissions at (+1) 202.449.8234.
- 2) Although not required, applicants are encouraged to contact the Chapter Admissions Chair for their jurisdiction if they have questions about the chapter review process. Chapter Admissions Chairs are listed on the SIOR website, www.sior.com/ at Membership > Chapters and Regions - or contact SIOR's Manager of Admissions at (+1) 202.449.8234.
- 3) Complete the application legibly and entirely and attach all required supporting documentation. Incomplete and/or illegible applications will be returned unprocessed. Keep a copy for your information and mail original documents with the nonrefundable application fee to:

Sumner Crosby
SOCIETY OF INDUSTRIAL AND OFFICE REALTORS®
1201 New York Ave., NW, Ste. 350, Washington, DC 20005 USA
direct phone: (+1) 202.449.8234; fax: (+1) 202.664.1320; email: scrosby@sior.com
- 4) *(Optional)* Send a photograph (headshot in business attire, color preferred) to be used in SIOR's membership directory and website upon approval of your application. Photos cannot be returned.
- 5) Keep in contact with the Manager of Admissions who will track your application through the approval process.



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OFFICE USE:
ID: _____
Paid: \$ _____
Rec'd: _____
By: _____
Spec: _____

Please print or type all information. Attach additional pages if you need more space to answer a question. Illegible applications will be returned Applications are available in Acrobat format only (not available in Word format).

1. **Last Name** (Surname) _____ **First** (Given) Name _____

Middle Name(s) _____ Suffix (Jr., III, etc.) _____ Nickname (if applicable) _____

2. **Current Company** _____

Address _____

City _____ State/Province _____ Zip/Postal Code _____

Country _____ Telephone _____ Fax _____

Email _____

3. **Home Address** _____

City _____ State/Province _____ Zip/Postal Code _____

Telephone _____ Mobile Phone _____

4. **Birth Year** _____ (optional) 5. **Country of Citizenship** _____
mm/dd/yyyy

6. **Current Employment:** Title _____ Month/Year Started _____

Duties and Responsibilities _____

7. Past Employment:

Real Estate Experience - list companies and employment dates if with current employer for less than 5 years:

8. Membership Category: (Choose one only)

See the SIOR website, www.sior.com/ at Membership > Requirements, for category descriptions.

- Industrial Specialist Office Specialist Dual (Industrial & Office) Specialist
- Advisory Specialist Sales Management Specialist Executive Specialist
- To Be Determined -- for applicants from outside Canada, Mexico & USA

9. Real Estate Experience - Provide the month and year for each area in which you have experience. There is a 5-year experience requirement.

General Commercial Real Estate Brokerage Experience: from _____ through _____

Industrial/Office Advisory Services: from _____ through _____

Industrial/Office Sales or Executive Management: from _____ through _____

Number of Brokers/Agents Managed (10 minimum for Sales Management Specialists, 100 minimum for Executive Specialists): _____ total --including _____ industrial & _____ office agents

Number of Offices Managed (3 minimum for Executive Specialists): _____

If you engage personally in transactional brokerage, you may not apply as a Sales Management or Executive Specialist.

Other Relevant Experience: _____ from _____ through _____

10. Education

Review the education requirements for earning the SIOR designation at www.sior.com/ at Membership > Requirements > SIOR Designation > Educational Requirements. Applicants may, but do not need to fulfill the educational or ethics requirement for SIOR membership before submitting their applications for approval. If approved for membership without sufficient education or ethics training, you will have one year from the approval date to complete these educational requirements. These requirements must be fulfilled before membership is achieved, except for the ethics education requirement, which must be fulfilled within the first three years of membership. Applicants who can document 10 years of experience in commercial real estate and have double the GFI ("Gross Fee Income") requirement (see number 14) are not required to complete the educational requirement with the exception of SIOR's Ethics Seminar.

- I request a waiver of the educational requirements, with the exception of SIOR's Ethics Seminar, on the basis that I have 10+ years of experience in commercial real estate and have double the GFI requirement.

Indicate educational achievements:

- Graduate School -- provide degree earned and major: _____
Provide copy of transcript to verify graduate degrees.

- Other -- provide details: _____

SIOR Courses/Seminars: *If completed, indicate date(s) and location(s).*

Course 100 _____ Course 103 _____

Course 200 _____ Course 203 _____

SIOR Construction _____

SIOR Understanding the Lease Agreement _____

SIOR Ethics Seminar _____

Other SIOR Elective Topics _____

Other Professional Courses (CCIM, IREM, etc.): *List courses and dates; attach copy of completion certificate for each.*

11. Real Estate Licensing - All applicants must hold a valid real estate license if their jurisdictions require one.

Salesperson License Date Acquired _____ State/Jurisdiction _____ Number _____
Broker License Date Acquired _____ State/Jurisdiction _____ Number _____
Other License(s) _____ Date Acquired _____ State/Jurisdiction _____ Number _____

No licenses are required in my jurisdiction.

12. References

a. The Qualification Report and Recommendation Form will be sent by the Manager of Admissions to the applicant 10 business days after the application is received. You must have two SIOR Members (SIOR designees) from outside your firm or affiliate complete the Qualification Report and Recommendation Forms and send them directly to SIOR's Manager of Admissions (under separate cover). Applicants located within SIOR chapter jurisdictions must obtain recommendations from within their chapters, unless more than 50 percent of the applicant's business is located outside the chapter jurisdiction, in which case one recommendation can come from outside the chapter jurisdiction.

Chapter jurisdictions are described at www.sior.com/ >Membership > Chapters and Regions.

(An applicant from outside Canada, Mexico and the USA may substitute a letter of recommendation from the senior executive of his/her firm for one Qualification Report if he/she is not acquainted with two SIOR designees. Those applying as an Executive Specialist may provide one recommendation from within their firm or affiliate.)

b. Personal References - In addition to the two Qualification Reports, you can provide the following references:

Client with whom you have consummated an industrial or office real estate transaction within the last two years.

Name _____ Company _____
Address _____ Phone _____

Real Estate Broker (preferably an SIOR) with whom you have cooperated.

Name _____ Company _____
Address _____ Phone _____

If you have been with your current firm for less than two years, a principal broker from your former company.

Name _____ Company _____
Address _____ Phone _____

13. Professional Accreditations Professional Designations Currently Held - Attach copy of certificate or letter to document each designation.

MRICS/FRICS BCCR CCIM CPA CPM CRE FRI MAI
 MCR/S other _____

14. Gross Fee Income (GFI) Affidavit

Executive Specialist Applicants: This Section is not applicable. Please go to Section 15.

Applicants for Industrial Specialist, Office Specialist, Dual (Industrial & Office Specialist), Advisory Specialist, or Sales Management Specialist must submit a Gross Fee Income Affidavit.

Applicants for membership with business addresses in Canada, Mexico or the USA must meet or exceed the stated dollar GFI plus meet or exceed the number of transactions requirement during at least three of the five 12-twelve-month periods that precede their application submission date. A minimum of 70% of the GFI requirement must come from industrial and/or office transactions. Contact your local Chapter Admissions Chair if you have specific questions about your GFI Affidavit. Contact information is available at www.sior.com/ at *Membership > Chapters and Regions* or by calling the Manager of Admissions at (+1)202.449.8234.

Applicants must submit an affidavit from their managing broker, CFO, or CPA detailing their Gross Fee Income (GFI) for at least three of the last five 12-month periods that immediately precede the submission date of their application. Gross Fee Income is that portion of income the company received that is directly attributable to the work completed by the applicant. However, there is no Gross Fee Income requirement for Executive Specialist applicants, or for any applicants whose business addresses are outside Canada, Mexico or the USA.

The minimum Gross Fee Income requirements for each market within a chapters' jurisdiction can be obtained from the SIOR website, www.sior.com/ at *Membership > Requirements > SIOR Designation > Gross Fee Income (GFI) Requirements*. If a market is not listed, it defaults to a \$300,000 requirement.

Chapter: _____

Market: _____

The GFI Affidavit must be downloaded from the SIOR website, www.sior.com/ at *Membership > Application Information*. Sales Management Specialist applicants should download the Sales Manager GFI Affidavit from the SIOR website at www.sior.com/ at *Membership > Application Information*. Applicants for the Dual (Industrial & Office) Specialty should download the Dual Specialty Affidavit from the SIOR website at www.sior.com/ at *Membership > Application Information*.

Sales Management Specialist Applicants: Multiply the listed criteria by 10 and then multiply the resulting number by 75% to determine your minimum standard for Gross Fee Income and transactions. You must manage at least 10 agents to qualify for Sales Management Specialist. You must submit your GFI on the Sales Manager GFI Affidavit instead of the regular Gross Fee Income Affidavit.

Advisory Specialist Applicants: In addition to the GFI Affidavit, you must attach an abstract describing in detail three completed advisory assignments.

15. Professional Standards - Answer "yes" or "no" to each of the following questions. If you answer "yes" to any question(s), attach a statement on a separate page providing a detailed explanation of the circumstances.

Yes No Have you ever been directly involved as a respondent to an ethics complaint relating to a real estate transaction during the past ten years?

Yes No Have you ever been found or admitted to have violated a code of ethics relating to a real estate transaction during the past ten years?

Yes No Has your real estate license ever been suspended or revoked by any real estate licensing authority?

Yes No Have any charges ever been filed against you alleging a violation of a licensing law?

Yes No Have you ever been convicted of a crime, other than a minor traffic violation?

16. Applicant Acknowledgment of Code of Ethics and Standards of Professional Practice

The SIOR *Code of Ethics and Standards of Professional Practice* (“Code”) reflects SIOR’s mission to maintain and promote a professional designation of the highest level for commercial real estate providers. It sets forth rules governing professional conduct and calls for settlement of financial disputes through mediation or arbitration. The *Code* applies to all real estate related professional and business dealings, including participation in SIOR related activities at the international, national, regional or chapter level. All SIOR Active members are required to follow the *Code*. Applicants are required to complete SIOR Ethics Training before receiving the SIOR designation.

The *Code* is administered, interpreted, and enforced by SIOR. Anyone, including a non-member, who has reason to believe that a Member has violated the *Code* may notify SIOR. SIOR will process any complaint that it receives in accordance with the *Ethics, Mediation and Arbitration Procedures Manual*, which includes procedures, policies, and forms used in ethics enforcement and financial dispute resolution.

The *Code* consists of sixteen (16) Principles, each of which has Standards of Practice associated with it. These Standards discuss specific applications or limitations to the Principle. Broadly stated, the *Code* includes the following obligations:

1. Act in the best interest of your client.
2. Act in an honest and responsible manner to all parties at all times.
3. Honor your fiduciary duties of loyalty, obedience, disclosure, confidentiality, good faith, due care and accounting to all parties having a legally recognized professional or business relationship.
4. Be sensitive to all potential and actual conflicts of interest.
5. Do not engage in any activity that may be regarded as self-dealing without full disclosure and approval from all parties involved.
6. Put all agreements in writing and retain accurate records.
7. Do not discriminate against any person.
8. Obey the applicable law.
9. Respect other existing codes of professional conduct governing your specialty in real estate.
10. Be truthful in all representations and advertising.
11. Do not make any false or misleading statements about products or persons.
12. Disclose agency and non-agency professional relationships and respect prior existing rights.
13. Honor any agreements with regard to fees to other real estate professionals.
14. Do not interfere with the relationships or rights of other real estate professionals.
15. Cooperate in all professional standards proceedings and actions.
16. Resolve financial disputes through mediation and/or arbitration.

Acknowledgment of this summary does not substitute for your responsibility to read and adhere to the *Code* in its entirety. The *Code* is included in application materials and may also be accessed, along with the *Procedures Manual*, in the Resources section of the SIOR Web site at www.sior.com.

I have read and agree to be bound by the SIOR *Code of Ethics and Standards of Professional Practice*. Should my conduct be found to be in violation of the *Code*, I understand that I may be subject to disciplinary action, including possible suspension or termination of membership and loss of the SIOR designation.

Date: _____

Signature: _____

Any questions about interpretation or specific applications of the *Code* should be directed to the attention of the Professional Standards staff liaison at SIOR Headquarters, PH: 202.449.8200.

17. Application Fee Payment:

Application Fee is \$175 (US dollars). This is a nonrefundable fee.

A check, payable to SIOR, is enclosed.

Charge my credit card: American Express MasterCard Visa
Account Number _____ Security Code _____ Expiration Date _____
Name on Card _____ Signature _____

18. Certifications - Check the box next to each statement to affirm that you have or will take the stated action in conjunction with your application for membership in SIOR's and provide any requested information.

- I agree. I have read SIOR's Bylaws and will uphold them and all official SIOR regulations if approved for membership in SIOR.
- I agree. If my business address is located within the United States of America, I affirm that I am currently, or will become upon acceptance as a member of SIOR, a member in good standing of the National Association of REALTORS® (NAR).
 - I am currently an NAR member; status: REALTOR® REALTOR-Associate® Institute Affiliate
 - What is your 9-digit NAR ID (NRDS) number? _____ (Obtain from your REALTOR® association.)
 - To which commercial or local REALTOR® board do you belong? _____
 - I am not currently a member of NAR, and would like to gain Institute Affiliate status through SIOR.
- I agree. If admitted to membership, I will abide by all obligations approved by SIOR's Board of Directors to maintain my designation and membership in SIOR, including periodic attendance at SIOR national and chapter meetings and events.
- I agree. I have read the SIOR Code of Ethical Principles and Standards of Professional Practice and agree to abide by the Code and fulfill all obligations related to the Code if admitted to membership.
- I agree. I affirm that there are no outstanding judgments, lawsuits, bankruptcies, or receivership actions pending against me or my firm; and if any such situations do exist, I have attached a detailed description of their circumstances.
- I agree. Acceptance and processing of this application by SIOR does not constitute approval of membership in SIOR.
- I agree. I hereby irrevocably waive any claim or any right to bring an action at law or in equity arising hereafter against SIOR, its staff, officers, members, or other officials or agents acting for SIOR, acting in concert or individually, for any act or omission made in connection with the business of SIOR, including without limitation any acts taken in connection with or relative in any way to my application for membership in SIOR, consideration for any position or committee membership in SIOR, and in connection with or relative to any disciplinary or arbitration proceeding involving me in any way. To the extent of applicable law, such actions are deemed privileged and are not subject to claims of defamation.
- I agree. If admitted to membership in SIOR, I will pay my SIOR dues and fees in full when invoiced or suffer possible expulsion from SIOR. If my business address is within Canada or the USA, I agree to pay a one-time \$725 new member initiation fee. I understand that current annual Active member due are \$1280 for USA and Canadian members, and \$610 for all others -- and are subject to change. I further understand that I will be assessed pro-rated dues during my first calendar year of membership and annually thereafter.
- I agree. If admitted to membership in SIOR, I will join the SIOR chapter that has jurisdiction over my business address, if any, and pay dues assessed by that chapter or suffer possible expulsion from SIOR.
- I agree. I affirm that if admitted as a Sales Management Specialist or Executive Specialist, if I change firms or positions within my firm, I agree to inform SIOR and relinquish my membership.
- I agree. **I affirm that the information included in this application, Gross Fee Income affidavit, and any attachments, is true to the best of my knowledge. I understand that SIOR reserves the right to request further information supporting my application.**

18. **Signature** (required): _____ Date: _____

19. *Send application materials to:*

Sumner Crosby
SOCIETY OF INDUSTRIAL AND OFFICE REALTORS®
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Washington, DC 20005 USA
phone: 202.449.8234; fax: 202.664.1320; email: scrosby@sior.com