

Firm name change request

| |
|---|
| Previous Firm Name |
| New name |
| <p>Attach the following documents</p> <p><input type="checkbox"/> Amendment to articles of incorporation or other documentation confirming name change</p> <p><input type="checkbox"/> Certificate of insurance in the firm's new name confirming that all insurance requirements are being met</p> |
| <p>Answer "yes" or "no" to the following questions. Specific questions require an explanation based on response.</p> <p>Has there been any change in the services offered to clients or the types of properties managed by the firm? (If yes, attach an explanation)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does the firm continue to have all insurance coverages required for membership in the AMO program? (If no, attach an explanation)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Was the change made in accordance with all federal, state, and local laws? (If no, attach an explanation)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Did the change result in the formation of a new corporate entity? (If yes, please attach an explanation and provide documentation—e.g., articles of incorporation)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Has there been any change of a substantial nature in the procedures the firm uses to manage the property? (If yes, attach an explanation)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> |
| Name of Executive CPM[®] |
| Signature |
| Date |

Firm ownership change

| | | | | | |
|---|--------------------------|---|-----------------------|------------------|---|
| AMO[®] firm name | | | | | |
| Percent of ownership that changed | | | | | |
| Reason for ownership change | | | | | |
| <input type="checkbox"/> A devise <input type="checkbox"/> An interfamily sale <input type="checkbox"/> An employee participation in a buyout. For each employee involved, provide the individual's name, position in the company, percentage of ownership, and tenure with the firm. <input type="checkbox"/> The purchase of the AMO firm by another firm. Provide a history of the acquiring firm, how long it has been in business. Include documentation attesting to how long the acquiring firm has been in business (e.g., articles of incorporation.) | | | | | |
| Please attach: | | | | | |
| <input type="checkbox"/> A detailed explanation of the cause or causes of the ownership change <input type="checkbox"/> Any other explanations or documentation as may be required based on answers given above or below | | | | | |
| Yes | No | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Has there been any change of a substantial nature in the procedures the firm uses to manage property? <i>(If yes, attach an explanation)</i> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Has there been any change in the services offered to clients or the types of properties managed by the firm? <i>(If yes, attach an explanation)</i> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the firm continue to have all insurance coverages required for membership in the AMO program? <i>(If no, attach an explanation)</i> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Was the change made in accordance with all federal, state, and local laws? <i>(If no, attach an explanation)</i> | | | |
| Ownership and officers | | | | | |
| Name | Position | % of ownership | % of new ownership | Tenure with firm | Is this person a CPM? |
| | | | | | <input type="checkbox"/> Y <input type="checkbox"/> N |
| | | | | | <input type="checkbox"/> Y <input type="checkbox"/> N |
| | | | | | <input type="checkbox"/> Y <input type="checkbox"/> N |
| | | | | | <input type="checkbox"/> Y <input type="checkbox"/> N |
| | | | | | <input type="checkbox"/> Y <input type="checkbox"/> N |
| | | Total must equal 100% | Total must equal 100% | | |
| Name of Executive CPM[®] | | | | | |
| Signature | | | | | |
| Date | | | | | |

Executive CPM[®] change request

A firm may request an Executive CPM change at any time. The firm has six months to submit this application designating a replacement. The individual must be in an executive position with authority/responsibility over the firm's real estate management services, policies, and procedures for 180 days prior to approval. The firm has one year from the date of the former Executive CPM's departure to meet the educational requirements outlined below. Failure to comply can result in the loss of your AMO accreditation.

| | | |
|---|---|------------------------|
| AMO firm name: | | |
| Executive CPM currently listed | | |
| <input type="checkbox"/> CPM departed firm (mm/yyyy) | | |
| <input type="checkbox"/> CPM remains with firm but had a change in position (mm/yyyy) | | |
| Name of new Executive CPM | | |
| Position/title of new Executive CPM | | |
| New Executive CPM has been with firm since | | |
| Please attach: | | |
| <input type="checkbox"/> A company organization chart that identifies the position held by the new Executive CPM | | |
| <p>Executive CPM authority; responsibility</p> <p>The Executive CPM must have authority and/or responsibility for (check to confirm)</p> <p><input type="checkbox"/> Delivery of the firm's real estate management services.</p> <p><input type="checkbox"/> Developing the firm's real estate management policies and procedures.</p> | <p>Executive CPM Functions</p> <p>The Executive CPM must have authority and/or responsibility for at least four of the six areas below. (check all that apply):</p> <p><input type="checkbox"/> Hiring and firing real estate managers.</p> <p><input type="checkbox"/> Establishing the firm's goals and objectives.</p> <p><input type="checkbox"/> Determining the services offered by the firm.</p> <p><input type="checkbox"/> Negotiating management agreements with clients.</p> <p><input type="checkbox"/> Binding management agreements with clients.</p> <p><input type="checkbox"/> Training and supervising real estate managers.</p> | |
| Executive CPM required education | | |
| Education requirement 1: Successfully completed one of the following: | | |
| <input type="checkbox"/> | BDM603: Leading a Successful Property Management Company - offered online and in the classroom | Completion date |
| <input type="checkbox"/> | BDM601: Growth Strategies for Real Estate Management Companies and HRS603: Today's Leadership Challenges- offered from 1997-2016 (Both courses are required) | |
| <input type="checkbox"/> | 701: Managing the Management Company - offered prior to 1997 | |
| Education Requirement 2: successfully completed one of the following: | | Completion date |
| <input type="checkbox"/> | ETH800: Ethics for the Real Estate Manager – classroom only (If this course was completed to become a CPM, it does not have to be taken) | |
| <input type="checkbox"/> | ETH001: Real Estate Management Ethics Online | |