PORTFOLIO
of Qualifying Experience
Quick Reference Guide

CCIM

Who needs to submit a portfolio?

Candidates must submit a portfolio to earn the CCIM designation unless they are approved for the Fast Track Program. To see if you qualify for the Fast Track Program, visit **www.ccim.com/membership/fast-track**.

When do I submit my portfolio?

Active candidates are eligible to submit a portfolio any time after passing CI 101. University Fast Track members are eligible to submit a portfolio after passing CI 103 or CI 104 depending on the specific program.

Submitted portfolios are reviewed twice a year, typically in February and August. Review the designation calendar at **www.ccim.com/designation/calendar** for submission deadlines and corresponding Comprehensive Exam information.

Where and how do I submit my portfolio?

All portfolios are submitted online:

> Upload documents at **portfolio.ccim.com** in PDF format (Email, Dropbox and/or zipfile are not permitted).
> Follow the step-by-step instructions within the online portal.
> Submit the portfolio for review and remit the submission fee.

How do I know the status of my submission?

You will receive an email approximately four weeks after the submission deadline with one of the following messages:

> **Approved:** Your submission is approved.
> **Incomplete:** Your submission is missing minor documents or details (e.g. a signature on your application or a recommendation), but your submission is otherwise acceptable. You have 30 days to supply the missing information to **designation@ccim.com** for your submission to be approved.
> **Disapproved:** our submission does not meet the criteria. Contact the reviewer indicated in your email notice directly with requested documents or questions. You have 30 days to supply these materials to the reviewer.

What are the current volume requirements?

> Three or more activities totaling a minimum of $30 million, or
> Exactly 10 activities totaling a minimum of $10 million, or
> 20 activities with no dollar volume requirement.

Qualifying activities are those that have taken place within five years of the portfolio's submittal date and in which the candidate has had substantial participation.

What do I include in my portfolio?

The type of portfolio you submit will depend on your specialization, role, and years of experience in commercial real estate. To see what roles and activities qualify, please review the Portfolio Handbook found at **www.ccim.com/portfolio.**

All submissions include:

Application

Resumé

Roles & Responsibilities

Chapter Recommendation

The remaining documents will vary depending on the type of portfolio you are submitting.

Traditional

Submit a traditional portfolio if you

> have **at least two years but fewer than five years** of full-time experience in commercial real estate, OR
> will be using a **lease renewal or extension, or financial analysis** as one or more of your qualifying activities.

Verification of Employment

Activity Data Form
1 per activity

Proof of Participation*

Proof of Participation*
2 per activity

Settlement Documentation
1 per activity

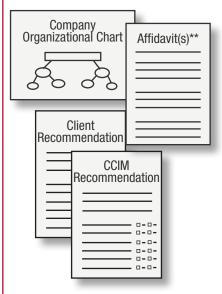Summary of Qualifying Activities (.xls)

Streamlined

Submit a streamlined portfolio if you

> have **at least five years** of full-time experience in commercial real estate, AND
> will **not** be using a **lease renewal or extension, or financial analysis,** as one or more of your qualifying activities.

Summary of Qualifying Activities (.xls)

Affidavit(s)**

Client Recommendation

CCIM Recommendation

Non-Transactional

Submit a non-transactional portfolio if you

> are in a **high-level professional role** that does not involve brokering transactions, AND
> have been in this role for **at least five years.**

Company Organizational Chart

Affidavit(s)**

Client Recommendation

CCIM Recommendation

* Proof of Participation: At least two proofs of material participation in addition to settlement documentation for each activity.
** Affidavit: Candidate shall obtain a signature / notary.

All forms are available for download on the portfolio portal at **portfolio.ccim.com.** Your résumé and company organizational chart may be uploaded in any format.

Still have questions?

Visit **www.ccim.com/portfolio** to view the Portfolio Handbook, which provides specifics about qualifying activities and professional roles.

For additional guidance email **designation@ccim.com** or call **+1 (800) 621-7027 ext. 4517.**