

PORTFOLIO OF QUALIFYING EXPERIENCE

Quick Reference Guide



*The Commercial
Real Estate Experts*

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.

What are the current volume requirements?

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.

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

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.

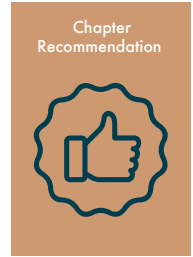
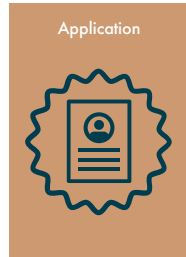
THE CCIM INSTITUTE

Advancing the Commercial Real Estate Profession

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:



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

Traditional

Submit a traditional portfolio if you

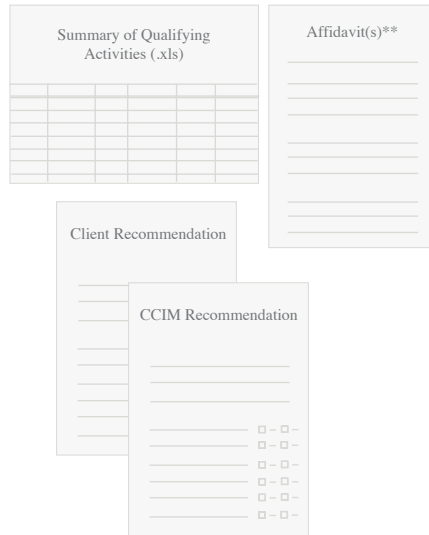
- have at least two years but fewer than five years of full-time experience in commercial real estate, OR
- will be using a lease renewal or extension, financial analysis, or a residential investment property as one or more of your qualifying activities.



Streamlined

Submit a streamlined portfolio if you

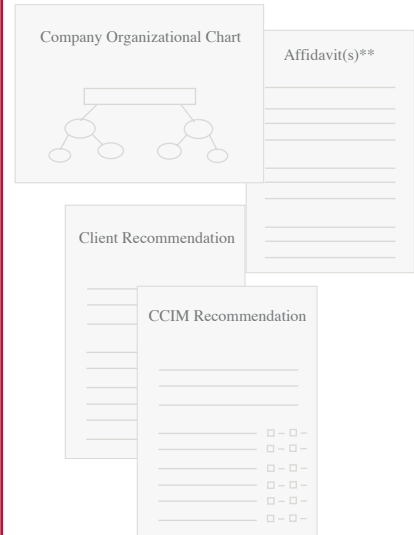
- have at least five years of full-time experience in commercial real estate, AND
- will not be using a lease renewal or extension, financial analysis, or a residential investment property as one or more of your qualifying activities.



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.



* Proof of Participation: At least two proofs of material participation in addition to settlement documentation for each activity.

** Affidavit: Signed and notarized from the CFO, CPA, or Managing Broker from each firm the Candidate was a member of during the previous five years.

All forms are available for download on the portfolio portal at portfolio.ccim.com. Your resume 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.