

# PORTFOLIO OF QUALIFYING EXPERIENCE HANDBOOK



**THE CCIM INSTITUTE**

*Advancing the Commercial Real Estate Profession*

# TABLE OF CONTENTS

Portfolio of Qualifying Experience Handbook .....	3
Understanding the Submission Process .....	4
Non-Qualifying Activities .....	5
Traditional Portfolio .....	6
Streamlined Portfolio .....	7
Streamlined Non-Transactional Portfolio .....	8
Required Contents .....	9
Questions About Qualifications .....	12
What Graders Look for in Portfolios .....	13
Confidentiality .....	14
Corporate Confidentiality .....	14
Qualifying Experience .....	15
Portfolio Submission .....	19
Frequently Asked Questions .....	20

Go to [portfolio.ccim.com](http://portfolio.ccim.com) to download the required forms and upload your documents.



# Portfolio of Qualifying Experience Handbook

The Portfolio of Qualifying Experience is a standardized means for candidates to verify the quality of their work as commercial investment professionals and to document having achieved at least the minimum level of experiences required to qualify for the CCIM Designation. Candidates must complete their first comprehensive exam attempt within two (2) years of portfolio approval. Failure to do so will void portfolio approval.

**Candidate members may begin compiling their portfolio any time after completing CI 101.**

Please note, Designation requirements on ccim.com will always supersede what is written and distributed in the Designation Handbook or portfolio workshop PowerPoint.

Professionals with these Designations can earn the CCIM Designation without the traditional elective credit and portfolio requirements as a [Fast Track Institute Candidate Member](#):

- AACI
- ALC
- CFA
- CLO
- CMB
- CPM
- CRF
- CRE
- FRI\*
- MAI/SRPA
- RICS (MRICS or FRICS)\*\*
- RPA
- SIOR

\*Proof of qualifying commercial real estate activities is required to apply with a FRI Designation.

\*\*Individuals who have held the RICS Designation for at least 10 years may be eligible for the [RICS Direct Track](#).

There are three (3) types of Portfolio of Qualifying Activities that may be submitted for review depending on your level of experience in the industry and/or the types of activities you are submitting:

## Traditional Portfolio

(minimum of two consecutive years of full-time experience required prior to the time of submission)

## Streamlined Portfolio

(minimum of five consecutive years of full-time experience required at the time of submission)

## Streamlined Non-Transactional

(minimum of five consecutive years of full-time experience in the same high-level role required at the time of submission)



# SUBMISSION PROCESS

## Understanding the Submission Process

### Volume Requirements

Candidates must document activities in one of the following ways:

1. Three (3) or more qualifying activities totaling \$30 million or more; OR
2. Exactly ten (10) qualifying activities totaling \$10 million or more; OR
3. Twenty (20) qualifying activities without regard to total dollar volume.

### Qualifying Activities Requirements

Qualifying activities are those that have taken place within five years of the portfolio's submission date and in which the candidate had substantial participation. (For example, portfolios submitted March 7, 2020, may not include activities completed prior to March 7, 2015).



# NON-QUALIFYING ACTIVITIES

## Non-Qualifying Activities

### Specifically Excluded From Qualification Are:

- Transactions in which the candidate did not have material participation.
- All apartment and residential leasing managers do not qualify for the Portfolio of Qualifying Experience.
- Mortgage financing on residential property of four (4) or less units.
- The sale, purchase, development, or exchange of any residential property of four (4) or less units.
- Apartment management and apartment leasing.
- Property management duties.
- Residential appraisals.
- Land sales of four (4) or less single-family, unimproved lots.
- The sale or purchase or exchange of personal residences.
- Construction/building, general contracting, construction management, space planning, or remodeling of commercial or investment real estate.
- Referral fees from any source including commercial real estate activity.
- Secondary or underlying loans of commercial real estate.
- Assumption loans.
- Leasing of individual offices, desk space, shared space within an executive office, shared office center, self-storage units, boat slips, or billboards.
- Auctioning of real estate – may qualify if certain functions were performed (see Exchange/Sales/Acquisition).
- Sale of business.
- Academic analysis/consulting/coursework.
- Broker opinion of value.
- Sale of commercial real estate notes.
- Investment Activities (REITs, stock funds, DST, limited partnerships, sales of fractional interest in real estate, etc.).
- Flipping houses.
- All residential investment leases, including apartment leases, condominiums, and student housing.
- Internships do not count toward years of experience.

# TRADITIONAL PORTFOLIO

## Traditional Portfolio

The traditional portfolio is available to all commercial real estate professionals who have a minimum of two consecutive years of full-time experience in commercial real estate at the time of submission. **If any of the qualifying activities involve lease renewals or extensions, financial analysis, or if candidate has less than five years of commercial experience, the Candidate must submit a Traditional Portfolio and include the additional documentation required by that category.** See the category section of the handbook for more details.

In the Traditional Portfolio format, the requirements and components for the portfolio remain the same. Traditional portfolios are submitted online and require all the following:

- Application (signed by candidate).
- Professional resume of real estate experience (i.e., employment history).
- Summary of your qualifying activities, transactions, projects, or work products.
- Activity Data Form for each activity (signed by candidate).
- Detailed explanation of role and responsibilities in your position.
- Copies of mutually executed closing/settlement statements and/or leases for each activity (i.e., evidence that transaction is complete).

- Verification of employment on company letterhead indicating candidate's full name, role with company, start/end dates, and name and position of signer. Letter should be notarized. If activities on the Summary of Qualifying Activities cover periods of employment with multiple firms, a letter is required from each of the firms.
- One signed letter of recommendation from a local chapter representative (on the required form).
- At **least two proofs** of material participation in addition to settlement documentation for each activity (see required contents). Examples include:
  - Commission checks with the candidate's name and reference to the transaction
  - Signature on settlement or closing documents
  - Copy of deed showing candidate as grantee or grantor
  - Signed listing agreement or letters of intent with candidate's name
  - Notarized statement from client or supervisor (only one per transaction)

### Identify the Parties to the Transaction

It is important for the candidate to identify parties to the transaction and the legal entities that they are a part of. For example, if an Exclusive Representation agreement names the client as "Mary Smith," but no mention of any legal entity and the closing documents name the buyer as Main Street LLC without Mary's name included, you must provide evidence that Mary Smith is a member of Main Street LLC.

# STREAMLINED PORTFOLIO

## Streamlined Portfolio

The streamlined portfolio is available to candidates who are **full-time commercial real estate professionals with five (5) or more consecutive full-time years of experience in commercial real estate from the date of application**. Streamlined portfolios require submission of all the following:

- Online signed application (signed by candidate).
- Professional resume of real estate experience (employment history).
- Activity Data Form for each activity (signed by candidate).
- Summary of your qualifying activities, transactions, projects or work product.
- Signed and notarized affidavit from the CFO, CPA, or Managing Broker from each firm the candidate was a member of during the previous five years. If the candidate is self-employed, the letter must be signed by an independent third-party such as a CPA. The affidavit attests to the candidate's full-time commercial real estate experience and that the signer has reviewed the Summary of Qualifying Activities and to the candidate's material participation in those activities. If the transactions submitted did not occur during time periods with these prior firms, then the affidavit from the prior firms must attest to candidate's full-time commercial real estate experience during that period. **International submissions shall obtain a witness signature in place of a notary.**
- Detailed explanation of role and responsibilities in your position.
- Three signed letters of recommendation (on the required forms), one from each of the following categories:
  - CCIM Designee (not of family or member of the same company)
  - Client
  - Local CCIM Chapter representative



# NON-TRANSACTIONAL PORTFOLIO

## Streamlined Non-Transactional Portfolio

The streamlined non-transactional portfolio is only available to those high-level, full-time commercial professionals at very large companies whose primary function is a substantial contribution to commercial real estate but does no longer includes brokering and/or facilitating actual transactions; thus, no dollar volume is applicable. **Five (5) or more consecutive years from the date of application in the same role/leadership responsibility is required to submit under this category.** This category includes:

- Bank and Trust Real Estate Asset Managers/Institutional Portfolio Managers
- Large and Institutional Corporate Real Estate Department (Leaders/Officers/Managers/CPA firms)
- Managing Brokerage Officers/Managers of Large Firms (supervising 20+ full-time commercial real estate agents)
- Large Public Private Venture Program Directors/Managers/Specialists

Non-transactional portfolios require submission of all the following:

- Streamlined online application (signed by Candidate).
- Professional resume of real estate experience (i.e., employment history).

- Affidavit which includes verification of at least five years in same role. **If the Candidate was with several firms during the five-year period, an affidavit is required from each of the firms. International submissions shall obtain a witness signature in place of a notary.**
- Provide a detailed explanation of role and responsibilities in your position.
- Provide a company organizational chart showing Candidate's high-level management position. If the Candidate was with several firms during the five-year period, an organizational chart is required from each of the firms.
- Three signed letters of recommendation (on the required forms), one from each of the following categories:
  - CCIM Designee (not of family or working relationship)
  - Client
  - Local CCIM Chapter representative



# REQUIRED CONTENTS

## Required Contents

Your experience and material involvement are to be described and documented in the Portfolio of Qualifying Experience. Required forms for the online submission must be downloaded, saved to your computer, and uploaded back to the portfolio website by visiting [portfolio.ccim.com](http://portfolio.ccim.com). The institute does not provide a template for the resume and overview of roles and responsibilities. Documents submitted via the portfolio website must be saved in PDF format.

### 1 Application (All Tracks)

All portfolio submissions must include an application. Each field on the form needs to be completed, and the application must include your signature.

### 2 Professional Resume (All Tracks)

A professional resume of employment history dating back far enough or confirming at least five (5) years in the commercial real estate industry is required. This document can be submitted in any format as long as there is enough detail to verify the experience.

### 3 Roles and Responsibilities (All Tracks)

This document should provide a summary of all day-to-day functions performed within your current position. It differs from the resume, which typically provides an outline of your career. Portfolio Reviewers rely on this document to clarify who you are and what you do as a real estate professional. This document can be submitted in any format.

### 4 Affidavit (Streamlined and Streamlined Non-Transactional)

The affidavit acts as proof of involvement for Streamlined and Streamlined Non-Transactional portfolios. An affidavit must be submitted for each company that you have worked for in the past five years. If you are the owner of the company, an independent CPA or independent accountant must verify ownership of business and volume of past commercial activities. An affidavit signed by one of Candidate's employees or an individual that reports to the Candidate (office manager, bookkeeper, etc.) will not be accepted. **International submissions shall obtain a witness signature in place of a notary.**

### 5 Proof of Material Participation (Traditional)

The CCIM Designation is awarded to individual members, not teams or partnerships. Though you may submit documentation of activities completed with other individuals, your submission must be in your own words and reflect your own individual experiences. Any form of copying may be deemed a violation of these rules. Type, volume, criteria, and substantiation required is dependent on the type of qualifying activity. A portfolio may contain a mixture of activities (such as five sales and five leases) in order to achieve the minimum requirements.

#### Definition of Material Participation

Material is defined as "being of real importance or of great consequence, substantial, relevant, pertinent, requiring serious consideration by reason of having a certain or probable bearing." Participation is defined as "the action or state of partaking of something in association with others such as a partnership or an enterprise on a formal basis with specified rights and obligations."

## REQUIRED CONTENTS

Each candidate must provide at least two documents of evidence of material participation in addition to settlement documentation for each activity.

Examples include: \*

- Copies of closing/settlement statements for each activity (evidence transaction is complete) with the Candidate's name on it.
- Your signature on the closing statement, contract, or lease declaring you as principal, witness agent, president, listing agent, selling agent, buyer/seller, or lessee/lessor.
- Evidence that shows the commission paid to you for your role (must indicate the property's address, especially in the case of a lease).
- Copy of the deed showing you as grantees or grantor.
- Signed listing agreement with your name on it.
- Report (market study, tour packages, etc.) prepared by you for your client with a recommended course of action, along with acknowledgement by the client of delivery of the report and discussion regarding the findings.
- Executed Letter of Intent (LOI) with the Candidate's name on it.
- Correspondence or emails documenting the transaction and reflecting your material involvement.

If you cannot supply one of the two minimum required proofs, a notarized letter\* may be submitted by one of the following who can substantiate your material participation in the activity:

- One of the parties to the transaction (landlord or tenant, buyer or seller).
- A principal of the firm employed at during the time of the transaction.
- The settlement attorney or title company used at closing.
- If you acted as a member of a team or in a supervisory capacity, additional documentation is required to prove your material participation. Explain your specific role in each transaction and your job responsibilities that were relevant to the completion of the transaction.

\* You may only provide one letter for each activity as a substitute for one of your two required proofs of material participation. You may only reference one activity per letter.

Each transaction letter must include:

- Detail of participation and activity (exactly what you did).
- Must be dated and on the writer's company letterhead (not plain paper).
- Contact information of the person who wrote the letter.
- The writer's relationship to the activity (landlord, tenant, buyer, seller, principal for firm, etc.)

\* Highlight your name on relevant supporting documents.

## REQUIRED CONTENTS

**6 Recommendations**

The letters of recommendation are essential components of the portfolio submission because they provide specific information related to a candidate's personal and professional characteristics or accomplishments. Up to three recommendations (on the required forms) may be required.

**CCIM Recommendation (Streamlined and Streamlined Non-Transactional)**

CCIMs providing recommendations must be active members of the institute (not a family member or someone with whom you have a working relationship). If you do not know a CCIM Designee, ask your chapter representative if he/she is willing to collaborate with another CCIM (a local chapter member) to conduct a panel interview as a means of obtaining both recommendations. CCIM recommendations are only required for streamlined submissions.

**Client Recommendation (Streamlined and Streamlined Non-Transactional)**

Provide a recommendation from your client or someone outside the company, such as an attorney, certified public accountant, title officer, or other professional who you conduct business with, who can vouch for your knowledge of the real estate business and your professionalism.

**Chapter Recommendation (All Tracks)**

The appointed chapter representative must complete the chapter recommendation letter. [Please refer to the list of approved representatives located within your online portfolio.](#)

To request chapter recommendation, candidates must notify the local chapter and schedule an in-person or phone interview with the appointed chapter representative. Candidates must be prepared to send the verification and recommendation form, a professional resume, and a summary of qualifying activities to the chapter representative prior to the interview. [Requests must be sent at least two weeks before the published portfolio deadline.](#) In-person meetings should be done in the Candidate's work environment.

Candidates should plan to discuss their past work history in commercial real estate at the interview. It may also be helpful for candidates to familiarize themselves with their local CCIM chapter's benefits and services.

Downloadable Forms	Online Streamlined	Online Traditional	Online Non-Transactional
Application	✓	✓	✓
Summary of Qualifying Activities	✓	✓	
Affidavit	✓		✓
Activity Data Form	✓	✓	
CCIM Recommendation	✓		✓
Client Recommendation	✓		✓
Chapter Recommendation	✓	✓	✓

# QUESTIONS

## Questions About Qualifications

If there is a question about whether your specialization qualifies for the Designation, refer to the overall principal:

“There must be substantial involvement with real property of a commercial and/or investment nature.”

As a standardized means of assessing that your experience qualifies for the Designation, please follow the guidelines indicated below. Provide as much documentation and explanation as you can. Your portfolio needs to clearly identify a character and level of activity consistent with experience requirements applied to all other candidates. The following factors will be taken under consideration:

- Years of experience or business activity.
- Nature of position or assignment and type of responsibility.
- Evidence of achievement in specialty (e.g., corporate review, advancement, professional Designations, advanced degrees, special recognition).
- Volume or quantity of work.
- Samples of actual work product of each activity.



# WHAT GRADERS LOOK FOR

## What Graders Look for in Portfolios

Graders are CCIM Designees who are proud to wear their pins and have gone through the rigorous process of preparing a portfolio. The graders look for a presentation that reflects the quality of work expected from a CCIM Designee.

If the graders determine that your portfolio does not adequately document your involvement in a transaction, they may request additional information. Typically, they'll ask for a three- to five-page narrative that describes your participation in the transaction. They may also request additional documentation to verify the activity in which you were involved.

If you have questions about preparing your portfolio, contact the Designation department at [Designation@ccim.com](mailto:Designation@ccim.com) or consult your local CCIM chapter for assistance.



# CONFIDENTIALITY

## Confidentiality

Contents of the portfolios are kept confidential by the institute. To guarantee the confidentiality of sensitive information and avoid conflicts of interest, graders do not review portfolios submitted from their own states or from candidates with whom they are familiar.

Portfolio graders are obligated to verify the candidate's material participation in an activity as required by CCIM Institute. An alternate activity must be chosen by the candidate when client confidentiality in an activity prohibits the disclosure of any or all the required documentation as listed in the portfolio handbook.

The candidate must provide sufficient facts and information for the grader to be able to read, understand, and grade the activity.

If there is attorney/client privilege preventing disclosure, candidates may be required to submit a different or alternate transaction.

### When Confidentiality Is an Issue

1. Go directly to the client/customer and discuss what you are trying to achieve and request the client's written permission for release. If permission is not granted, candidates must submit a different transaction.
2. Create a document for the client or customer to sign verifying that you were directly involved in the transaction and that the client has given permission to disclose particulars of the transaction. Always ask.
3. An engagement letter should include the client's name, property identification, fee, and type of work that was completed. The client must have their signature notarized.
4. Inform the client/customer that the Portfolio of Qualifying Experience is not used for marketing or public display and that it will be destroyed after it is reviewed by the CCIM grader.
5. Some clients/customers may ask for copies of what you are going to submit to CCIM prior to submission. Consider providing these to your clients so they understand your situation.

## Corporate Confidentiality

You must be able to provide adequate documentation to verify the activity and to demonstrate your participation. Contact the CCIM Designation department for further assistance.

Portfolio graders are obligated to verify the candidate's material participation in an activity as required by CCIM Institute, which should include:

- Property location.
- Dollar volume.
- Transfer.
- Property case study.

Senior portfolio graders review this information with sensitivity and confidentiality. Most likely this information can be provided in a letter from the chief financial officer that attests to the above information.

# QUALIFYING EXPERIENCE

## Qualifying Experience

### Commercial Real Estate Exchange/Acquisitions/Sales

- **Qualifying Activity:** Sale or transfer of title of commercial or investment real estate, as set forth herein, that involves a deed that transfers title to the property to a new entity.

Land, including but not limited to, properties such as a ranch, timber, or farm is an acceptable qualifying activity as long as the transaction is not considered solely as a business transaction (such as a dairy farm) and the underlying real estate is held for investment purposes, in compliance with IRS Code\* 1221 and/or 1231. The real estate is always the underlying factor in the transaction, not the existence of any business transaction. If the raw land is considered to be a speculative investment hold transaction, substantiation of such future growth or change in use should be provided. Documentation of the expected changes to the property should be included; examples of documentation would be an aerial photograph to show the path of growth, supporting demographics, etc. \*Visit [irs.gov](http://irs.gov) for code details

- **Volume:** Determined by value of property conveyed.
- **Substantiation:** A copy of the recorded and signed deed or fully executed closing statement signed by both Buyer and Seller, or in escrow states, by the escrow officer or other title company official, and the candidate.

**Auctions:** Activities that involve the use of auctions must be submitted under the traditional track. A detailed financial and market analysis (use of CCIM skills) must have been performed in the sale of the property and such documentation provided with the portfolio. "Caller and cashier" services do not qualify.

Only submit pages that include significant elements:

Legal description of the property  
**HIGHLIGHT YOUR SIGNATURE** and proof  
of all material participation.

## QUALIFYING EXPERIENCE

## Commercial Financial Analyst

Job responsibilities of someone with the financial analyst title vary greatly from company to company. Financial analysts whose job responsibilities include providing analysis and written recommendations based on this analysis to the ownership and/or transaction team pertaining to scenarios related to qualified commercial transactions involving the leasing and/or sale of commercial properties may qualify. This involves far more than just entering data into a financial software program. The candidate must show a higher level of understanding and interpretation other than simply inputting data and must also show a clear recommended course of action based on their analysis for an activity to qualify.

- **Qualifying Activity:** Completed and closed leasing transaction of commercial real estate (office, retail and industrial), with a lease term of one year or more, or the completed and closed sale or transfer of title of commercial or investment real estate, as set forth herein, that involved a deed.
- **Volume:** See requirements for commercial investment real estate lease and sale/purchase/exchange.
- **Substantiation:** See requirements for commercial investment real estate lease and sale/purchase/exchange. Additionally, provide an explanation of your specific role in each transaction, copies of the financial analysis and written recommendations, at least two proofs of acknowledgements of the recommendation from the team/owner being reported to and an explanation of how your recommendations were either followed or not followed in the actual transaction. The portfolio grader may request additional information to substantiate your role in the transaction.

## Commercial Investment Real Estate Leasing

- **Qualifying Activity:** Completed and closed leasing transactions of commercial real estate (office, retail, and industrial), with a lease term of one year or more. Effective Jan. 1, 2022, a minimum of 500 sf required for lease transactions.
- **Volume:** Determined by gross or base value (base rent) of the lease signed (exclusive of automatic renewals, options, separately billed taxes, insurance, operating expenses, etc.) Example: three-year lease at \$10,000 rental/year = \$30,000 volume. Volume must be calculated by candidate or candidate must provide a worksheet showing how the volume of the rental was calculated and highlight the rental figures in the lease.
- **Substantiation:** Fully executed copy of the lease. Only submit pages that include significant elements: legal description of the property, the agreed-upon lease rental amount, lease term, signatures (highlight your signature), and any other pertinent pages that document your role.
- Real estate lease renewals may ONLY qualify if the Candidate can demonstrate that the new lease renewal substantially changed the lease beyond the extension of time and rental amount, such as a major expansion, relocation, change in the type of lease form (e.g., full-service lease to triple net lease agreement), OR if the candidate can demonstrate that the renewal of the existing lease required a substantial amount of time and effort negotiating rental rates and other major market issues with either the tenant and/or the landlord and included the use of a detailed market analysis. In the case of the tenant, it must include showing the tenant alternate locations in the market. A copy of the market analysis must be submitted along with the trail of correspondence (letters, emails, tour lists, etc.) substantiating the amount of time and effort involved.
- Residential leases, including apartment leases, do not qualify as activities for the portfolio. Apartment and residential leasing managers do not qualify.
- The leasing of self-storage units, billboards, boat slips, and similar activities do not qualify

## QUALIFYING EXPERIENCE

## Commercial Mortgage Financing of Commercial Real Estate

Lender or mortgage broker candidates who are directly involved in the origination, brokerage, and/or underwriting of loans on completed commercial or investment real estate, as set forth herein, may qualify.

- **Qualifying Activity:** Closed first-position loans on qualifying commercial investment real estate property.
- **Volume:** Determined by value of financing.
- **Substantiation:** Copy of the signed loan documents, closing statements, and mortgage/deed of trust.
- Candidates who have applied for and received or acquired loans for their own benefit or for the benefit of an entity in which they are employed or involved do not qualify. Secondary or any underlying positions of commercial real estate and assumption loans do not qualify.

## Commercial Real Estate Appraiser

Candidates that are full-time commercial appraisers who are directly involved in appraisals of qualified commercial real estate may qualify.

- **Qualifying Activity:** Performance as a third-party fee appraiser relating to commercial property (excluding residential property or land of four (4) or less units) where a complete appraisal report was prepared and specific compensation was received. To qualify, all activities must be at arm's length without conflict of interest.
- **Volume:** Determined by the "as-is" appraised value of property.
- **Substantiation:** Copy of the full and complete appraisal report, proof of delivery of the report to the client, identify the client and an explanation of the purpose of the appraisal, and a copy of the payment made to you for services. Candidates must submit a Traditional portfolio.

## Commercial Real Estate Development

Candidates working as Developer (not General Contractor and/or construction manager) may qualify.

Note: Developers may also have Qualifying Activities in the acquisition of the developing site and subsequent leasing of the finished development.

- **Qualifying Activity:** Includes the development of any Qualifying Property -- office, retail, warehouse, industrial, medical, or residential (must be more than four units). The development project must be completed (built), not proposed. To qualify, completed developments must result in substantial change in character or the use of property that can be fully documented and analyzed.
- **Volume:** Determined by the substantiated market value of the completed development.
- **Substantiation:** The formal approval documents or permits and site/development plans as substantiated, evidence of actual closing(s), completed property transfers with a deed and/or third-party appraisal showing the present value of the completed development.

## QUALIFYING EXPERIENCE

## Commercial Real Estate Attorney

Attorneys must be licensed in the state or province in which they reside. Must demonstrate material involvement in the negotiation of transaction terms.

Activities limited to facilitating the closing process such as preparation of a closing addendum to the settlement statement or completion of a standard lease agreement template do not constitute material involvement and are not sufficient to meet this requirement. Candidates must submit a Traditional portfolio.

- **Qualifying Activity:** Any commercial real estate sale, lease, loan, or development transaction in which the attorney represents an appropriate party (buyer, seller, landlord, tenant, lender, developer). To qualify, the transaction must be a fully completed real estate transaction (closed sale/purchase, fully executed lease agreement, closed and funded loan, completed development, etc.).
- **Volume:** The final sales price of a sale, the gross lease amount of the initial lease term, the loan amount if a loan, or the market value of the completed development.
- **Substantiation:** The attorney must submit a signed and notarized letter from the client verifying the attorney's material involvement in the completed transaction in their capacity as legal counsel. The letter must describe the attorney's role and summarize the transaction issues specific to the role of an attorney. The attorney must also provide a narrative statement explaining how CCIM skills were applied in the transaction.

# PORTFOLIO SUBMISSION

## Portfolio Submission

You are strongly encouraged to start compiling your portfolio file once you complete CI 101. Don't wait until the end of the program and then have to recreate your work from memory. Every time you complete a qualifying activity, make copies of the documents that verify its completion and your material participation. In addition, make notes about your role so you'll have a running start on your activity data forms. If you have been accumulating materials all along, preparing the portfolio won't be so difficult.

### Timeline

Published portfolio deadlines refer to the last date that will allow for review and grading prior to the next Comprehensive Examination. Portfolio Review sessions are scheduled in advance of the Comprehensive Examinations to allow sufficient time for revisions and re-grading. Portfolios may be submitted at any time during your candidacy. Those who have completed all their education requirements and whose portfolios have been approved by the Comprehensive Examination deadline will be eligible for that exam. Portfolio submittal deadlines are also available in other institute publications, on [www.ccim.com](http://www.ccim.com), at chapter meetings, and through chapter newsletters.

### Grading Results

Results are e-mailed within one week of the grading session. Candidates are asked to refrain from calling for results unless they have not received them by e-mail within one week of the grading session.

### Disqualifications

Breach of portfolio rules/guidelines may result in disqualification of individual activities or the portfolio in its entirety. Duplicate portfolios/activities in the case of partnerships or teams will result in the disqualification of all related portfolios.

**Falsification of information will permanently disallow the entire portfolio.**

### Portfolio Revisions

Candidates have 30 days from notification to submit revisions of disapproved portfolios for re-grading. If revisions are approved and all other requirements are fulfilled, the candidate may submit the application for CCIM Designation and register for the Comprehensive Examination.

### Appeals Process

Applicants whose Portfolios of Qualifying Experience are disallowed may appeal that decision to a review board comprised of three members selected from each of the following committees: Executive, Designation, and Professional Standards. Members are appointed by the CCIM President.

### Portfolio Review

Portfolios are reviewed by the Designation department to determine whether they qualify for the grading session. If items are found lacking or the format does not conform to the requirements, you will be advised of a date by which revisions must be received to be eligible for grading.

### International Portfolios

All portfolios must be submitted in English. Supporting documentation that is submitted in a foreign language must highlight and translate the type of document, name of candidate, transaction amount, and names of parties involved into English and U.S. dollars on the document.

### Portfolio Workshops

For more information and individual assistance with the Portfolio of Qualifying Experience, candidates are encouraged to attend a CCIM Portfolio Workshop. Please check with your local CCIM chapter or CCIM Institute for dates and locations.

## Frequently Asked Questions

### How would commercial property managers qualify?

A property manager can qualify in two ways:

- If the person holds the CPM or RPA Designation, he or she can apply through the [Fast Track](#) program.
- If the commercial property manager (regardless of whether they hold the CPM and/or RPA Designation) can document significant material involvement in the commercial leasing of or the sale/purchase/exchange of a qualifying commercial property, he or she may qualify. The volume would be based on the gross amount of the commercial lease or value of the transferred commercial real estate. See the sections on “Commercial Investment Real Estate Leasing” and/or “Commercial Real Estate Exchange/Acquisitions/Sales” for more details.

### If a candidate is both the listing and selling agent in one deal, does it count as one or two?

The transaction is only one transaction, and the deal volume is counted as the sale price or gross lease amount.

### Can candidates from the same company use the same transaction if they both participated in it?

The candidates can use the same transaction; however, they must write in their own words what took place in the activity and demonstrate their specific involvement and how it was different than the other candidate's. Portfolios submitted from the same company are graded by the same grader to ensure that candidates are completing their own work.

## FREQUENTLY ASKED QUESTIONS

**If I reach the required dollar volume in less than five years in the industry, can I submit a Streamlined Portfolio?**

No, you must submit work experience confirming at least five (5) years in the commercial real estate industry.

**I am working on a development or consulting project, but the transaction has not closed yet. May I submit the transaction?**

Only completed activities may be submitted. In the case of a commercial real estate development, the project must be completed. In a consulting project, the report must be completed.

**I cannot retrieve the settlement documentation. May I bypass that requirement?**

All activities require some form of settlement documentation to show completion/closing of the transaction. For a Streamlined Portfolio, the resume of experience must include an affidavit with your transaction summary.

Go to [portfolio.ccim.com](http://portfolio.ccim.com) to download the required forms and upload your documents.





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