



CCIM Institute

Equipping the world's best minds in commercial real estate

Online Portfolio

Short tutorial on how to use the online portfolio application, accessible at

<http://portfolio.ccim.com>

Getting started

You can access your Online Portfolio account from inside your Member Console area (<http://memberconsole.ccim.com>) or by going directly to <http://portfolio.ccim.com>

[CCIM HomePage](#)

[Member Console](#)

[Member Profile](#)

Welcome To CCIM's Member Console

About Me

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Resources

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Go to **My Account** web site area and start uploading your portfolio application

My Account

Overview & HowTos

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There are two ways to submit your portfolio online

Traditional

Streamlined

Check the requirements for each ...

The **Traditional** is for those Commercial Real Estate Professionals regardless of time in the **commercial real estate industry**.

Applicants must:

- Submit online application
- Submit activity data form for each activity
- Submit a summary of qualifying activities, transaction, projects or work products
- Provide copies of closing or settlement for each activity
- Provide a detailed explanation of role and responsibilities in your position
- Provide a recommendation from the local chapter representative (or authorized representative)
- Provide at least two proofs of material participation in each activity. Examples include:
 - Commission checks
 - Signature on settlement or closing documents
 - Copy of deed showing candidate as grantee or grantor
 - Signed listing agreement with candidates name
 - Notarized statement from client or supervisor

The **Streamlined** Portfolio is only available for Commercial Real Estate Professionals with five (5) or more years in the commercial real estate industry.

Applicants must:

- Submit Streamline online application
- Submit a professional resume of real estate experience (employment history)
- Submit a summary of your qualifying activities, transactions, projects or work products
- Submit a signed and notarized Affidavit from CFO, CPA or Managing Broker (Affidavits are returned to the candidate for uploading)
- Provide a detailed explanation of role and responsibilities in your position
- Provide three recommendation forms from a:
 - CCIM Designee (who does not work in the same firm or is related to you)
 - Client (someone whom you have worked for in a professional capacity)
 - Local chapter representative (or authorized representative)

...and select the one that is appropriate for your profile:

Select Traditional

Select Streamlined



1. **Set Agreement**

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Submit Agreement

Please note that in order to take part in this Online Resume of Qualifying Experience submission you **MUST** complete this form and return it to the CCIM Institute.

- Name:**
Company:
Address:
City:
State:
Zip/Postal Code:
Business Phone:
Business Email:

I will submit my application and take the CCR and Comp Exam in the following location:

Preference	Submission Deadlines	CCR and Comp Exam Date	Location
<input type="radio"/>	August 1, 2011	October 12, 2011	Phoenix, AZ

Select the application track that you will pursue (see [info on application tracks](#))

- Streamlined
- Streamlined Non-Transactional
- Traditional

- All of my required education coursework, including the Online Ethics Course will be completed 30 days prior to the CCR and Comp Exam and this registration is contingent upon approval of my Online Resume of Qualifying Experience and all recommendations.

Select the **Location & Exam Session** that you are planning to take part to..

Select the **Application Track** that you will pursue.

Confirm if this requirement is met.

Submit Agreement



Member: 08922714
Track: STREAMLINED
[Logout](#)

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8. [Additional Documents](#)
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Once your **Application track** and **Exam location** (see previous slide) are set, you can start uploading your various forms, required by your particular application track.

Submit Agreement

You previously submitted your agreement on **Monday, January 31, 2011**

Please note that in order to take part in this Online Resume of Qualifying Experience submission you **MUST** complete this form and return it to the CCIM Institute.

Name: Todd Sabin
Company: Cameron Real Estate Services, Inc.
Address: 1250 North Tamiami Trail Suite 101
City: Naples
State: FL
Zip/Postal Code: 34102
Business Phone: (239) 261-1111
Business Email: tsabin@cresfla.com

I will submit my application and take the CCR and Comp Exam in the following location:

Preference	Submission Deadlines	CCR and Comp Exam Date	Location
<input checked="" type="radio"/>	August 1, 2011	October 12, 2011	Phoenix, AZ

Select the application track that you will pursue (see [info on application tracks](#))

- Streamlined
- Streamlined Non-Transactional
- Traditional

All of my required education coursework, including the Online Ethics Course will be completed 30 days prior to the CCR and Comp Exam and this registration is contingent upon approval of my Online Resume of Qualifying Experience and all recommendations.



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Forms for the **Traditional Application track** can be downloaded from here

Traditional Application Track

Traditional

Download the application forms for this track:

- [Online Application Form](#) (pdf)
- [Summary of Qualifying Activities Form](#) (xls)
- [Activity Data Form](#) (pdf)

Recommendation Forms

- [Chapter Representative](#) (pdf)

Download [Portfolio Submission Form](#) (pdf)

Please note:

Roles and Responsibilities, Two proofs of your role, Closing or Settlement documentation and Supplemental Forms can be submitted/uploaded in any format and are not provided by CCIM.

PDF files must be downloaded and saved to your computer. Simply click the link to the PDF and go to **File > Save As**.

The **Summary of Qualifying Activities Form** must be in EXCEL FORMAT (trying to upload a PDF file will result in error).

Once the forms are completed, PDFs can be uploaded back to the Portfolio website. If you do not save the files to your computer, any information you enter may be lost when closing the PDF.



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Streamlined Application Track

Streamlined / Streamlined Non-Transactional

Download the application forms for this track:

- Select the appropriate form:
 - [A: Streamlined Application Form \(pdf\)](#)
 - [B: Streamlined Non-Transactional Application Form \(pdf\)](#)
- [Summary of Transactions Form \(xls\)](#)
- [Affidavit # 1 Form \(pdf\)](#)
- [Affidavit # 2 Form \(non-transactional\) \(pdf\)](#)

Recommendation Forms

- [CCIM Designee \(pdf\)](#)
- [Client \(pdf\)](#)
- [Chapter Representative \(pdf\)](#)

Please note:

The **Resume, Organizational Chart, Roles and Responsibilities** and **Supplemental** forms can be submitted/uploaded in any format and are not provided by CCIM.

PDF files must be downloaded and saved to your computer. Simply click the link to the PDF and go to **File > Save As**.

The **Summary of Transactions Form** must be in EXCEL FORMAT (trying to upload a PDF file will result in error).

Once the forms are completed, PDFs can be uploaded back to the Portfolio website. If you do not save the files to your computer, any information you enter may be lost when closing the PDF.

Forms for the **Streamline (including Non-Transactional) Application track** can be downloaded from here



Member: 08922714
Track: STREAMLINED
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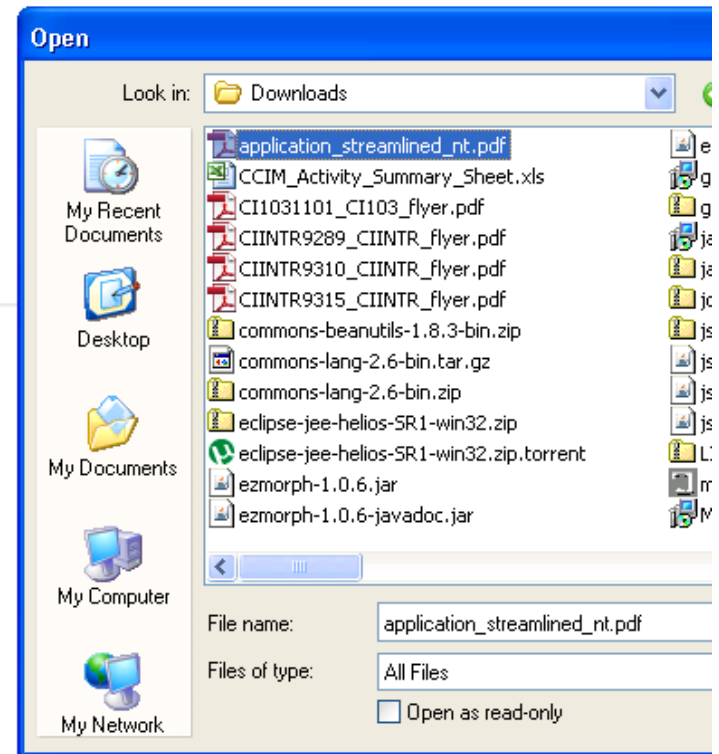
Application

Application File: No file chosen

You can download a blank Online Portfolio **Application Form** from [here](#)

Please note: PDF files must be downloaded and saved to your computer. Simply click the link to the PDF and go to **File > Save As**. Once the forms are completed, PDFs can be uploaded back to the Portfolio website. If you do not save the files to your computer, any information you enter may be lost when closing the PDF.

Select the appropriate form to upload and then click the upload button.





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Application

Application File: [view](#) | [delete](#) - Uploaded Thursday, July 28, 2011

You can download a blank Online Portfolio **Application Form** from [here](#)

Please note: PDF files must be downloaded and saved to your computer. Simply click the link to the PDF and go to **File > Save As**. Once the forms are completed, PDFs can be uploaded back to the Portfolio website. If you do not save the files to your computer, any information you enter may be lost when closing the PDF.

Next

You can then **view** or **delete** the uploaded document.



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[Logout](#)

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Submit Online Portfolio Application

CCIM Institute's Online Portfolio Submission offers you an alternative way to satisfy the experience requirement necessary to receive your CCIM Designation. The Portfolio Submission is done entirely online and emphasizes your qualifications rather than your use and documentation of CCIM skills.

The portfolio will be graded during the August 25th - 26th, 2011 time period.
Results of your submission will be sent via email within one week following the session.

Your application is incomplete and it cannot be submitted at this moment.

Portfolio Application	✓
Roles & Responsibilities	✗
Resume	✗
Qualifying Activities	✗
Transaction Affidavits	✗

Next

When all required documents are uploaded, click the Submit Portfolio link to go to send your whole portfolio for review.

Our system will analyze your documents and let you know if every required document is present and if you can submit your portfolio.



2011 Online Portfolio Submission Form

Part 1 of 2 — Personal Information

* = Required field.

Registration

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Address *	
<input type="text"/>	
City *	State
<input type="text"/>	<input type="text"/>
Country *	ZIP/Postal Code
<input type="text"/>	<input type="text"/>
E-mail *	Cell Phone *
<input type="text"/>	<input type="text"/>
Customer Number *	<input type="text"/>

Your application will be reviewed only after the **application fee** is paid.

The form can be found at: <https://registration.ccim.com/form/onlineportfolio>

Part 2 of 2 — Registration Fees

Exam Location

<input type="radio"/> Fall 2011 in Phoenix, AZ	Fee:	\$100
<input type="radio"/> Spring 2012 in Kansas City, MO		
<input type="radio"/> Fall 2012 in Las Vegas, NV		
<input type="radio"/> International Offering		
<input type="radio"/> Undecided		

Do you have a COUPON?

Total: \$100

Payment - You may pay by credit card or, if you are an international member, specify that you want to have a CCIM Institute representative contact you to arrange for a wire transfer.

Credit Card: Visa MasterCard American Express

Credit Card Number

Expiration Date (mm/yyyy)

Security Code

I want to pay by wire transfer, and have a CCIM Institute representative contact me directly!

Submit