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training today's professionals for tomorrow's business

[DynamicDirections.com](http://DynamicDirections.com)  
[Info@DynamicDirections.com](mailto:Info@DynamicDirections.com)

# WHO WE ARE



training today's professionals for tomorrow's business

- **We are a diverse faculty of international and national association management industry consultants, real estate event speakers, advanced skill trainers and noteworthy subject matter experts.**
- **We deliver timely and relevant quality programs for real estate professionals, boards, leadership, association executives and staff members in an engaging and entertaining way.**
- **We are very easy to work with and always prepared.**
- **We are committed to the success of your program and will consistently deliver superior results and raving fans.**

[DynamicDirections.com](https://www.DynamicDirections.com) | [info@DynamicDirections.com](mailto:info@DynamicDirections.com)

# WHAT WE DO



**Association Management Consulting Solutions for Advocacy, MLS, Diversity, Professional Standards Administration, Global Alliances, Policy Governance, Staffing and Operational Assessments, Finance and Budgeting Integrity, Facilities Management Assessments and Professional Development Staff Training and Coaching**

**Coaching, Consulting and Interim Support for CEOs, Officers, Leadership Team, Finance Team, Ed Directors, Government Affair Directors, MLS Boards, Marketing and Communication Teams**

**Association and MLS Leadership Training, Strategic and Departmental Business Planning, Leadership Academy Retreats and Implementation Consulting, Special Training and Planning Programs for Smaller Boards**

**In-Person, Virtual and Hybrid Advanced Career Development, for Broker/Owners, Managers and Team Leaders; Convention and Member Event Programs, Skill Training, Webinars, Workshops**

**Pre-Licensing Training, New Agent Skill Training and Onboarding Programs, CE Courses, State Licensure Broker Compliance Workshops**

# OUR FACULTY OF CONSULTANTS AND SPEAKERS BY AREA

**Association Management Consultants**

**Strategic Planners for Associations and MLSs  
Strategic Planners for Advocacy, Financial  
Management, Governance Policy and Structure,  
Professional Development, Communications and  
Facility Management**

**Association and MLS Leadership Training, Meeting  
Management and Leadership Academy**



# ASSOCIATION MANAGEMENT CONSULTANTS



Adorna Carroll



Rick Harris



Christine Todd



Robert Morris



Nancy Lane



Jim Harrison



Linda St. Peter



Bill Malkasian



Karen Becker



Christie Bevington



Matt Difanis



Shannon Buss



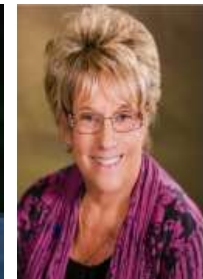
Kimberly Allard



Tamara Suminski



Zola Szerencses



Lynn Madison

## Leadership, Advocacy, MLS, HR, Professional Standards, Finance, Facilities Operation, Commercial, Professional Development and Staff Coaching, Consulting and Training Team

- Workshops for CEOs, Staff, Trainers, Leaders, Members
- Executive Team Coaching/Consulting
- Leadership Training, Harassment Training
- Leadership Academy Program Consulting/Training
- Meeting Management Training
- Leadership Topic Workshop Series
- Budget and Finance Coaching/Consulting
- Succession Planning
- Building State/Local Advocacy Programs
- Evaluating Technology Tools/Platforms for Synergy
- Data Solutions and Multi-Market MLS Collaboration
- Diversity-Inclusion Training for Boards and /or Staff
- Pro Standards, Mediation & Administration Training
- Finance and Budgeting Consulting
- AE/CEO Exit Strategy Planning and Consulting
- Developing a Government Affairs Staff
- Building Use and Rent vs Buy Analysis
- Contemporary Business Issues Impacting Brokerages
- Strategic, Business and Scenario Planning
- Ed Director Consulting/Coaching
- Building a profitable Prof Development Program
- MLS Mergers, Acquisitions, Consolidations
- Board Mergers, Acquisitions, Consolidations
- Team Building and Conflict Resolution
- CEO Contract Negotiation Consulting
- Staff/Structure Assessment Consulting
- Facility Management Consulting
- Advocacy Funding/Budget Assessment Process
- Inter-department Collaboration
- AE/Staff Conference Programs, Seminars
- Convention Programs and Member Events
- Instructor Development Training
- Developing Global Business and Outreach
- Reserves, Restricted, Dedicated Funds Analysis
- Workforce Analysis and Interim Assoc Management
- Social Media – Best Practices and Conduct Policies

## STRATEGIC PLANNING for ASSOCIATIONS



Christine Todd



Shannon Buss



Adorna O. Carroll



Rick Harris



Lynn Madison



Tamara Suminski

### MLS STRATEGIC PLANNING

### ADVOCACY

### INTERNAT'L

### FINANCE//FACILITIES



Rick Harris



Jim Harrison



Bill Malkasian



Zola Szerencses



Nancy Lane



Linda St Peter

## ASSOCIATION MANAGEMENT CONSULTING and HR



Adorna Carroll



Rick Harris



Christine Todd



Karen Becker



Christie Bevington

### PROFESSIONAL DEVEL

### PROFESSIOANL STANDARDS

### DEI



Jamie Bowman



Matthew Rathbun



Christie Bevington



Karen Becker



Matt Difanis



Robert Morris

## ASSOCIATION AND MLS LEADERSHIP TRAINING and LEADERSHIP ACADEMY



Adorna O. Carroll



Rick Harris



Christine Todd



Jim Harrison



Shannon Buss



Kimberly Allard



Tamara Suminski



Robert Morris



Lynn Madison



Linda St Peter



Zola Szerencses



Matt Difanis

Leadership Puzzle, Ethical Leadership, Authentic Leadership, Leadership for International Associations; Leadership and Social Media, Leadership Academy Programs; Harassment Training for Volunteers

## LEADERSHIP TRAINING AND STRATEGIC PLANNING FOR SMALLER BOARDS

The Leadership Puzzle has been delivered by Adorna Carroll for over 20 years to associations all over North America. This course has helped volunteers elevate the understanding of their legal duties, BOD responsibilities, how to partner with staff, understand why bylaws and governing documents are important, know how to get things done, reduce micromanagement, stay in their lane, avoid conflicts of interest, understand issues of harassment and increase meeting management skills.

Our team of highly credentialed trainers with proven leadership experience will deliver this exceptional course in a specific virtual format for your local board at a greatly reduced price scaled according to your size. After Leadership Training, if you also want a Strategic Plan, members of this team can also facilitate a low- or high-level plan for your association that satisfies NAR Core Standards. Once done, your board will be able to create a budget that can financially plan to achieve their goals and objectives. Contact Adorna Carroll for small board special pricing – [Info@DynamicDirections.com](mailto:Info@DynamicDirections.com)



Patrice Willetts



Maurice Taylor



Melanie Gamble



Chris Duff



Gail Athas

# ADVANCED CAREER DEVELOPMENT TRAINERS AND EVENT SPEAKERS



**Adorna O. Carroll**



**Rick Harris**



**Shannon Buss**



**Matt Difanis**



**Kimberly Allard**



**Lynn Madison**



**Robert Morris**



**Zola Szerencses**



**Tamara Suminski**



**Matthew Rathbun**



**Linda St. Peter**



**Maurice Taylor**



**Melanie Gamble**



**Chris Duff**



**Deb Killian**



**Patrice Willetts**



**John LeTourneau**



**MJ Agostini**



**Michelle Behrendt**



**Jamie Bowman**



**Gail Athas**



**Amy Lavoie**



**Kelly Harvey**



**Rhonda Lentini**

- Convention Keynote and Member Events
- Private Company Programs and Events
- Broker, Owner, Manager, and Team Training
- Advanced Business Management Courses
- Advanced Designation/Certification Courses
- Commercial and Auction Courses
- CE Courses – Original Commercial Electives
- CE Courses – Original Residential Electives
- Webinars and Virtual Skill Workshops
- New Agent Training – The Right Start
- RE Assistant Training Courses
- GRI and Skill Development Programs
- RE Financing Courses



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[Info@DynamicDirections.com](mailto:Info@DynamicDirections.com)



# EMAIL CONTACT LIST FOR OUR FACULTY OF CONSULTANTS AND SPEAKERS



## CONSULTANTS AND TRAINERS BY DEPARTMENT



**Adorna O. Carroll, DSA**  
ABR, AHWD, CRB, C-RETS, SRS, RENE, PSA, ePRO, SFR, GRI  
Adorna@Adorna.com

Association Strategic Planning; Leadership Training, HR Training for Leadership; Executive Team and BOD Coaching Skill Training, CEO Retreat Speaker; Convention/Event Speaker



**Rick Harris**  
ABR, AHWD, CIPS, CRS, SRS, GRI  
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MLS and Association Strategic Planning; Leadership Training, HR Training for Leadership; Executive Team Coaching and Mediations; Professional Standards Training; CEO Retreat Speaker; Convention and Event Speaker



**Christine M. Todd**  
CAE, RCE, Magel Award Recipient  
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Association Strategic Planning; Leadership Training; CEO Coaching; Contract and Exit Strategy Consultant; Consulting for Harassment, Discrimination for Staff, and Staffing issues CEO Retreat Speaker



**Bill Malkasian**  
CAE, Magel Award Recipient  
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Building and Implementing a Strategic Advocacy program; GAD Coaching; AE Retreat Program Speaker; GAD Retreat Program Speaker



**Nancy Lane**  
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Budget/Finance Review/Analysis; Treasurer, CEO and LT Finance Coaching; Contract Negotiations; CEO Retreat Speaker; Building Buy, Rent or Build Analysis; Creating Commercial Overlay board; Mediator



**Jim Harrison**  
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MLS Business Strategies and Technology Solutions; BOD Structure and Operations Analysis; Contract Negotiations; Policy Development; Mergers, Acquisitions and Consolidations; Broker-Agent Services and Technology Tools; Data Sharing Initiatives; HR Training for Staff



**Karen Becker**  
Former Local Association and MLS CEO  
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MLS/Assn Contract Negotiations; Merger Guidance; Consulting for Harassment, Discrimination for Staff, and Staffing issues; Operational Structure and Staffing Analysis; Interim CEO; CEO Coaching and Exit strategies; CEO Replacement Guidance



**Matt Difanis**  
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Professional Standards Training; Ethical Leadership Training; Mediation Training; Professional Standards Administration Training; CEO Retreat Speaker; DEI Consultant



**Christie Bevington**  
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Interim Ed Director support; Coaching Ed Directors-Event Planners; Profitable Ed Program Consulting; Creating effective education/instructor policies; Contract Negotiations; CEO Interim Staffing, Exit strategies and CEO Replacement Guidance



**Robert Morris**  
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Association Strategic Planning; Leadership Training, Executive Team and BOD Coaching Skill Training, CEO Retreat Speaker; Convention and Event Speaker; DEI Consultant

All Programs and Services are Individually Quoted to Your Program and Project Specifications

## CONSULTANTS AND TRAINERS BY DEPARTMENT

**Linda St. Peter**

AHWD, CCIM

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Facilities Operations Management Consultant; Budgeting for Renovations, Repairs and Replacement of hard/soft capitol assets; Leadership Academy trainer; Commercial trainer and conference speaker

**Zola Szerencses**

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Global Outreach Consultant ; Global Assn Business Plan Facilitator; Leadership Trainer – Domestic and International; Agent Coaching; International Advanced Skill Trainer; Conference Speaker

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**Maurice Taylor**

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Leadership Trainer; Convention Speaker; RPAC Fundraising Coach/Consultant Leadership Trainer; Military Relocation Specialist; DEI Trainer; Advanced Skill Trainer

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**Mathew Rathbun**

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Convention Speaker; Course Creator; Instructor Training; Technology Training; Advanced Skill Trainer; Business Brokerage Coach/Consultant for Ed Directors

**All Programs and Services are Individually Quoted to Your Program and Project Specifications**

## CONSULTANTS AND TRAINERS BY DEPARTMENT



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Assistants; Advanced Skill Trainer**



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**Leadership Trainer; Convention Speaker;  
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DEI Trainer; Advanced Skill Trainer**



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RENE

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**CT License Law Specialist; Residential Skill  
Trainer for CE, Workshops and Webinars;  
Conference Speaker**

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promo@gatebiz.com

TRAINING TODAY'S REAL ESTATE PROFESSIONALS

FOR TOMORROWS BUSINESS



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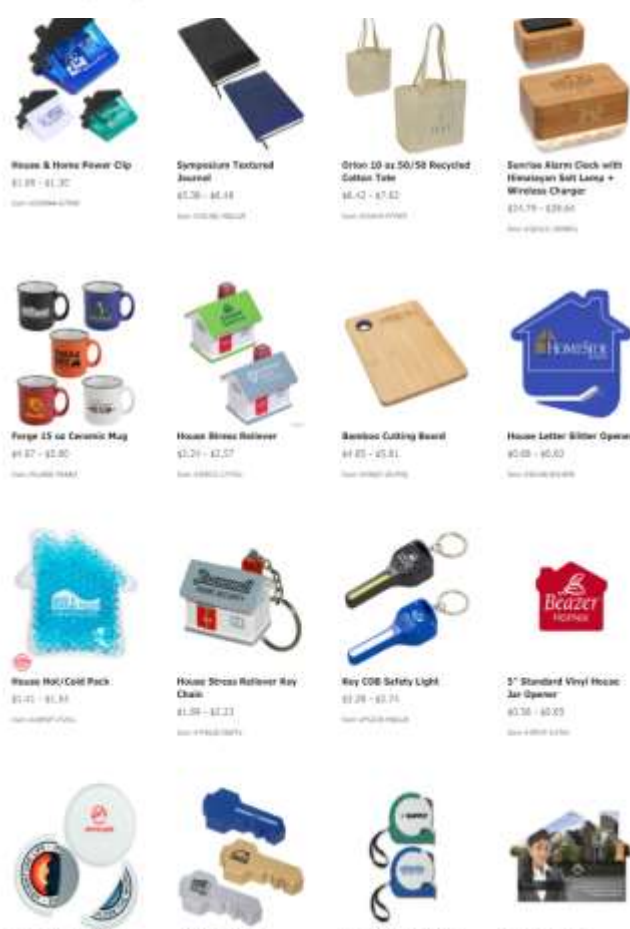
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- Member Events
- Association Promo Items
- Client Closing Gifts
- RE Specific Promo Items

**Association Apparel; Awards; Bags;  
Drinkware; Gifts, Headgear; Health;  
Office, Tech; Writing and other items for  
all price points!**

<https://www.promoplace.com/dynamic-directions>



# DELIVERY OPTIONS FOR VIRTUAL DESIGNATION, CERTIFICATION AND CERTIFICATE COURSES



# COURSE DELIVERY OPTIONS

## Option #1: YOU HIRE US – IN PERSON OR VIRTUALLY

WE provide the trainers to teach a private course for your association. You pay us for our trainer and absorb the cost of all course delivery expenses and course royalty fees.

## Option #2: WE PAY YOU TO SEND YOUR STUDENTS TO US

WE pay you a per student referral fee and your association receives non-dues revenue.

WE absorb all course delivery costs. We handle all student registrations, we pay the trainer, we pay any course royalty fees, we pay your association for students you send and we pay all admin expenses.

### All YOU DO:

1. Let us know you want to partner on a non-exclusive basis
2. Promote any or all of our virtual courses on our registration page: <https://dynamicdirections.com/course-schedule>

**Yes, It's Just That SIMPLE!**



# THE TRIFECTA

The **ESSENTIAL CREDENTIALS** for All REALTORS® - New or Seasoned



## DESIGNATION

### 2-Day Core Course

Learn more about the designation requirements at [REBINstitute.com](https://REBINstitute.com)



## DESIGNATION

### 2-Day Core Course

Learn more about the designation requirements at [REBAC.net](https://REBAC.net)



## CERTIFICATION

### 2-Day Core Course

Learn more about the certification requirements at [REBINstitute.com](https://REBINstitute.com)

Pricing Options for REBAC & REBI providers – Per Day Instructor Fee for Live or Virtual Classroom

We can also offer in our Virtual Classroom and rebate you a flat fee per registrant.



# BUSINESS MANAGEMENT SERIES

The first and only team certification recognized by the  
National Association of REALTORS®



**CRETS**  
Certified Real Estate  
**TEAM SPECIALIST**

**Four 1-Day Elective Courses**  
(Any 3 required for certification)

- **Designing & Sustaining Successful Teams**
- **Team Leadership for Maximum Performance**
- **Position Your Team for Profit**
- **HR Solutions for Teams**

Learn more about the certification requirements at  
[REBINstitute.com](https://REBINstitute.com)

**The best real estate business management courses in the industry!**

## **1-Day Elective Courses**

(Any 3 required for designation)

- **How to Start a RE Company**
- **Recruiting for Success**
- **Show Me the Money! – Compensation Planning**
- **Building a Business Plan that Gets Results**
- **Performance Leadership – Coach, Manage & Mentor**
- **Creating a Profitable Real Estate Company**
- **The Firm Rules – Company Policies to Mitigate Risk**
- **HR Essentials for Today's Real Estate Company**
- **Exit Strategies for Real Estate Brokerage Owners**
- **Managing a Multi-Generational Business**



**CRB**  
CERTIFIED REAL ESTATE  
BROKERAGE MANAGER

Learn more about the designation requirements at [REBINstitute.com](https://REBINstitute.com)

Pricing Options for REBAC & REBI providers – Per Day Instructor Fee for Live or Virtual Classroom

We can also offer in our Virtual Classroom and rebate you a flat fee per registrant.

# NEW AGENT TRAINING

**An Exceptional Onboarding Solution for Owner/Brokers, Managers, Team Leaders and Newly Licensed Agents that want a solid foundation to generate business and minimize risk!**



**Three-Part Series: 1-Day Courses**

- Part 1: “Building Your Business & Demonstrating Your Value”
- Part 2: “Converting Buyers & Building Your Buyer-Side Business”
- Part 3: “Neutralizing Seller Concerns & Building Your Listing-Side Business”

## Options

- Your organization delivers the courses and pays trainer a flat per day fee
- We deliver the program; you send your students to us, and we pay you a per student referral fee .

## Delivery

- Traditional classroom.
- Virtual classroom - Live Instructor-Led (e.g., Zoom)  
Can be delivered on days, nights and weekends

# REAL ESTATE PROFESSIONAL ASSISTANT



**New!**

**Certificate Program**

## **Real Estate Professional Assistant Course**

Have you heard about our new course for assistants? The Real Estate Professional Assistant Certificate course\* is designed to sharpen current professional assistant's skills or jumpstart an aspiring assistant's career. As a result, the assistant will become an irreplaceable part of the agent's business plan or team, and help manage risk.

*\*The Real Estate Professional Assistant Certificate course was developed by REBI in partnership with the National Association of REALTORS® / Center for REALTOR® Development.*

### **Topics Covered** (click to expand/contract)

- Understanding the institution of real estate.
- Tasks performed by professional assistants.
- Creating a career as a professional assistant.
- Providing exceptional customer service.
- Managing the transaction.
- Time management.
- Marketing, branding and creative components for the agent.
- How successful agents or teams work with buyers and sellers and how an assistant can equip the agent or team to grow their business and serve their clients with a high level of professionalism.
- Real estate technologies and build a tool kit to support the agent's or team's business.
- Contemporary and proven marketing techniques, tools and assets to run a successful marketing and branding plan on behalf of the agent or team.
- Creation of engaging and meaningful resources to assist the agent or team with the preparation and execution of a Client Interview.



# ADVANCED CAREER DEVELOPMENT COURSES

The Dynamic Directions faculty delivers a variety of designation and certification courses.



## 2- Day Course

Learn more about the designation requirement at [Green.realtor](https://www.Green.realtor)



## Variety of Courses

Learn more about the designation requirement at [NAR.realtor](https://www.NAR.realtor)



## 2-Day Course

Learn more about the designation requirement at [SRES.realtor](https://www.SRES.realtor)



## PRICING STRATEGY ADVISOR

### 1-Day Course

Learn more about the certification requirement at [PricingStrategyAdvisor.org](https://www.PricingStrategyAdvisor.org)



### 1-Day Course

Learn more about the certification requirement at [MilitaryRelocationPro.org](https://www.MilitaryRelocationPro.org)



### 1-Day Course

Learn more about the certification requirement at [RealtorSFR.org](https://www.RealtorSFR.org)



### 1-Day Course

Learn more about the certification requirement at [NAR.realtor](https://www.NAR.realtor)



## Real Estate Investing: Build Wealth Representing Investors and Becoming One Yourself

### 1-Day Course – ARB elective

Learn more about the designation requirement at [Training4RE.com](https://www.Training4RE.com)



### 1-Day Course

Learn more about the certification requirement at [NAR.realtor](https://www.NAR.realtor)

# ORIGINAL PROGRAMS – Brokers, Managers, Teams

## CONVENTION, MEMBER EVENTS, WEBINARS and WORKSHOPS

- What Keeps Brokers Up At Night Series – MLS/DOJ; Issues of Compensation; Issues Affecting Your Business, Future Trends, Onboarding Systems for New Agents; Issues of Recruiting and Retention
- What Keeps Team Leaders and Their Broker/Managers Up at Night
- Getting Your Business in Gear – Company Business & Goal Setting
- Empowering Your Team
- To Team or Not to Team
- Starting a Brokerage – What you need to know
- Company Policies to Mitigate Risk
- Conveying Your Value
- Systems for Superior Service
- Systems for Onboarding New Agents
- Raising the Professional Bar in Your Company
- Protecting Your Professional Company Image
- Practical Policies Necessary to Protect Your Brokerage
- Diversity and inclusion for Brokerages - RM
- How to Lose Your Brokerage
- Managing and Coaching New and Seasoned Agents – PW



**CLASSROOM  
DELIVERY**



**VIRTUAL  
DELIVERY**

# ORIGINAL COURSES and PROGRAMS

## CE, CONVENTION, MEMBER EVENTS, WEBINARS and WORKSHOPS

- Appraised Property – Fact or Fiction - RL
- Advanced Buyer Agency – Contractual Representation
- Buyer Counseling Session
- Seller Counseling Session
- General Agency Courses
- Destination Buyer/Seller – Your GPS
- Why Deals Fall Apart
- Fair Housing – Myths and Realities
- HUD Inspection and Appraisal Process
- Issues and Opportunities for Securing Your Compensation
- Getting in Gear
- Shift Happens – Issues and Future Trends
- Systems & Time Management
- Generating Business and Conveying Your Value
- Going Green without Going Crazy
- Lead Generation and Geo Farming - ZS
- Building a Business with International Clients – ZS
- Creating and Maintaining Loyalty with International Clients – ZS
- Raising the Professional Bar
- Representing Senior Clients – Your Critical Role
- Representing Sellers in a Changing Environment
- Rentals – Rules of the Road - RL
- Its Rented, now what? - RL
- Listings – the good, the bad and the ugly
- Field Issues of Fair Housing
- Diversity and Inclusion – Bridging the Gap
- Navigate Transaction Minefield – PW
- Time and Life Management – MJ
- Systems for Building Your Business – MJ
- Systems for Superior Service
- Tech Tools and Tips for a Successful Business
- Valuation and Marketing of Vintage and Historic Property - MJ



**CLASSROOM  
DELIVERY**



**VIRTUAL  
DELIVERY**

# ORIGINAL COURSES and PROGRAMS

## CE, CONVENTION, MEMBER EVENTS, WEBINARS and WORKSHOPS

- Own Your Story - TS
- Relationships Matter: From URL to IRL - TS
- Art of Personality: Knowing Yours/Understanding Theirs - TS
- Lead Generation: Marketing Strategies for Success - TS
- You Shoulda' Put a Ring on Them (Buyer Agreements) - TS
- Winning with Buyers: Creating Loyalty, Winning Offers & Boosting Referrals - TS
- Working with Sellers: Top 10 Things You Should Do - TS
- Life by Design: Create Your Life Strategy - TS
- Art of Negotiation: Tips, Tactics, Techniques & Tools - TS
- Business Planning for Success - TS
- Be Safe: Prepared, Protected, Professional & Profitable - TS
- Helping Clients in Today's Market - TS
- Preparing to Win with Buyers & Sellers - TS
- Video: Get Ready for Your Close Up – TS
- Goals Make Good Things Happen - RM
- Manage My Time and Control My Life! - RM
- Get More Done in Less Time for Better Customer Service! - RM
- The Difference Between Ordinary and Extraordinary - RM
- Have You Asked Them? – Embracing Diversity and Inclusion – RM
- Money for Sale – The Perils of Wire Fraud and Money Laundering - DK
- Back to the Future – What the Mortgage Crisis Taught Us! - DK
- The Underwriter Wants What? - DK
- The Rate is What? – What Every Agent & Buyer Needs to Know About Risk-Based Pricing - DK
- Taking a loan transaction from application through closing - DK
- Calculating Income for Self-Employed Borrowers - DK
- Real Estate Settlement Procedures Act (RESPA) - DK,
- Truth in Lending (TILA), Fair Housing, Anti-Money Laundering, Equal Credit Opportunity Act (ECOA) - DK,
- Cybersecurity, Gramm-Leach-Bliley Act (GLB) - DK
- Privacy Laws, Home Mortgage Disclosure Act (HMDA) - DK
- Predatory Lending and Mortgage Fraud - DK



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# ORIGINAL COMMERCIAL PROGRAMS

## CE, CONVENTION, MEMBER EVENTS, WEBINARS and WORKSHOPS

- Intro to Commercial Real Estate – LS; MJ
- Property Maid or Property Manager? - LS
- The 4 x 4 Rule for Investor Clients - LS
- How to Create a Commercial Niche and Make Money Doing I - LS
- Basics of Personal Investing - LS
- Capital Improvements and Expenditures Assessments for Commercial Properties - LS
- Commercial Investment Real Estate Fundamentals - LS
- Assessing Buying/Selling Commercial Properties – LS; MJ
- Industrial Leasing and Sales - LS
- Office and Retail Leasing and Sales - LS
- Auctioning Property – Going, Going, Gone! - MJ
- Intro to Auction – MJ
- Opportunities & Pitfalls in Commercial Real Estate - JL
- Best Practice in Marketing Commercial Real Estate - JL
- Best Practices in Leading Commercial Real Estate - JL
- Being Supplied Answers Beats Trying Guesses – JL
- Why Should I Hire You? – Commercial Listing - JL
- Cracking Down Your Market with Data - JL
- Bulletproof Your Business for a Changing Market - JL
- CORE – Commercial 5 Day Boot Camp -JL



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# QUESTIONS?



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