

REGISTRATION FORM – SRES® TWO-DAY COURSE

CONTACT INFORMATION:

Name _____

Firm name _____

Address _____

City _____ State _____ Zip _____

Phone (W) (____) _____ (H) (____) _____

**e-mail address _____

WRA member # _____

**A confirmation for this course will be sent by e-mail. You can also go to "myWRA" at www.wra.org to verify course registration.

REGISTRATION FEES:

(Early Bird pricing applies two weeks prior to the start of the course)

SRES®	Early	Regular	ATD
<input type="checkbox"/> February 19-20, 2009 WICPA Brookfield	\$375	\$385	\$405
<input type="checkbox"/> August 20-21, 2009 WRA Madison	\$375	\$385	\$405

COURSE LOCATIONS:

Wisconsin Institute of Certified Public Accountants
235 North Executive Drive, Suite 200, Brookfield, WI 53005

Wisconsin REALTORS® Association
4801 Forest Run Road, Madison, WI 53704

Class time: 8:30 – 4:30 p.m.

Check in time: 8 a.m.

HOTELS:

Best Western Midway
1005 South Moorland Road
Brookfield, WI 53005
262-786-9540

Hampton Inn – East
4820 Hayes Road, Madison, WI 53704
608-244-9400 – Room Rate: \$89
(mention being a WRA student)

Special Services: Check here if you require special services to attend. Attach a written description of needs.

PAYMENT:

Enclosed is my check made payable to the WRA.

Charge my VISA/MasterCard (circle card type)

Card # _____ Exp. date _____

Register by Mail: WISCONSIN REALTORS® ASSOCIATION
4801 Forest Run Road, Suite 201 | Madison, WI 53704-7337

Register by Phone: 800.279.1972 | 608.241.2047

Register by Fax: 608.241.5168 | **Online Registration:** www.wra.org/SRESinfo

CANCELLATION POLICY: The WRA reserves the right to cancel this course if not filled. Cancellations must be made in writing prior to the start of the course and will be refunded, minus a \$25 administrative fee. Registrations cannot be transferred from person to person.



WISCONSIN REALTORS® ASSOCIATION

designation course

SRES

Two-Day SRES® Course

February 19-20, 2009 | Brookfield

August 20-21, 2009 | Madison

Also qualifies as an ABR® elective

SRES

register today!

www.wra.org/SRESinfo

4801 Forest Run Road, Suite 201 | Madison, WI 53704-7337

WRA Wisconsin
REALTORS®
Association

Seniors Real Estate Specialist (SRES®)

Why an SRES® Designation?

In Wisconsin, 8 percent of home buyers are age 65 or older, which is ahead of the national average. Many baby boomers are nearing retirement age and will have significant buying power for years to come. By earning your SRES® designation, you will have the knowledge and expertise to counsel clients, age 55-plus, through major financial and lifestyle transitions involved in relocating, refinancing, or selling the family home.

SRES® Designation Program

To earn the SRES® designation you must complete the following.

1. Successful completion of the two-day SRES® Designation Course, including an 80 percent passing grade on the exam.
2. Maintain active membership in the National Association of REALTORS®.
3. Maintain active membership in the SRES® Council (Senior Real Estate Council). The first year membership in the SRES® Council is included in the course fee. However, every year thereafter will require payment of annual dues of \$99.

BONUS ENROLLMENT ADVANTAGE: The SRES® course counts as one elective course toward the ABR designation and as an elective course toward the RSPS certification.

Course Overview

This two-day training program offers you the unique opportunity to learn and build key skills in counseling seniors through selling their family homes, buying rental properties, or moving to senior communities.

You will learn how to:

- Identify the power of generational demographics
- Develop and maintain relationship marketing skills
- Counsel rather than sell to seniors
- Use team-building skills with other seniors professionals
- Understand the implications of tax laws, probate and estate planning
- Create a point of difference from the competition
- Identify key differences in housing options, from age-restricted communities to age-in-place design to assisted living.
- Understand the various financing strategies and tax implications for seniors
- Offer clients relevant information on current trends in senior real estate transactions.



Instructor

Barb McGill, ABR, CRB, CRS, GRI, and SRES

Since 1977, Barb McGill has been active in Wisconsin real estate and is currently vice president of corporate training for First Weber Group REALTORS®, Brookfield, Wisconsin.

Barb has earned numerous professional designations. She has conducted training programs throughout Wisconsin and for a national real estate organization in several states.

She is approved as a national instructor for the National Association of REALTORS® Real Estate Buyer's Agent Council and the Senior Real Estate Council. She was selected as the Wisconsin REALTORS® Association's Instructor of the Year in 2002 and 2006.

Barb is a director for the Greater Milwaukee Association of REALTORS®. She is a member of the Wisconsin License Law Task Force, and every year since 2005 she has been appointed by Governor Doyle to the Wisconsin Council on Real Estate Curriculum and Examinations.



register today!

www.wra.org/SRESinfo

Course Outline

The 50+ Market

- Distinguishing characteristics and trends of the 50+ market.
- Stereotypes versus valid generalities about 50+ real estate clients.

50+ Communities and Properties

- Issues and factors that go into community and property selection.
- How to evaluate your area for 55+ market attractiveness
- Vocabulary of housing options for the 50+ market.
- Application of federal laws for Housing for Older Persons Act (HOPA).

Gaining the Market

- Business building outreach methods for communicating and gaining 50+ market share.

Counseling Buyers and Sellers

- Methods for counseling the 50+ buyer and sellers.
- Avoiding inappropriate involvement in family matters.
- Developing sensitivities to 50+ issues and priorities

Providing Services for 50+ Clients and Customers

- Services that win and sustain client and customer relationships
- Assembling a team of experts to help you serve 50+ clients

Financial and Tax Matters

- Uses, benefits, procedures, and issues involved in reverse mortgages.
- Uses of pensions, 401k accounts, and IRAs in real estate transactions.
- How Medicare, Medicaid, and Social Security impact 50+ real estate decisions.
- Mortgage finance and loan schemes and scams that victimize 50+ borrowers.

Planning Ahead for Life Transitions

- Identify key life stages, viewpoints, and transitions in relation to housing choices.
- Recognize how a home can be adapted for safety, comfort, and aging in place.

Building a Resource Bank

- Housing options, programs, resources, and services for 50+ clients