

# THE VIRTUOSO

A Newsletter of North Carolina's Candidates' Club

Published by the **INSTITUTE OF GOVERNMENT**

NUMBER 5, DECEMBER 1986

JOSEPH E. HUNT, EDITOR

## BEAMER IS THE STATE'S NEWEST RES

Richard Beamer, Chief Appraiser for Randolph County, was confirmed by IAAO's Executive Board at its recent meeting in San Francisco as North Carolina's newest Residential Evaluation Specialist (RES). Beamer, who was among the first state assessment administrators to become active in the Candidates' Club, completed his requirements earlier this year. He became a candidate in the IAAO professional program on March 4, 1985.

Richard has been with the county for five years. He has been a regular member of IAAO since 1984 and has successfully completed IAAO courses 1, 2, 201, 301, 302, and 4. Other career-oriented courses to his credit include Fundamentals of Property Tax Collection, Fundamentals of Property Tax Listing and Assessing, and Fundamentals of Listing and Assessing Business Personal Property. Richard holds a degree from Cleveland Institute of Electronics in Broadcast Engineering.

**Congratulations, Richard!**

## 1987-88 CALENDAR

| Year | Month     | Days                | Dates | Classroom |
|------|-----------|---------------------|-------|-----------|
| 1987 | April     | Monday/<br>Tuesday  | 13-14 | III       |
| 1987 | September | Thursday/<br>Friday | 3-4   | III       |
| 1988 | February  | Monday/<br>Tuesday  | 22-23 | III       |
| 1988 | November  | Thursday/<br>Friday | 3-4   | III       |

17 300

## IAAO'S POSITION ON RECIPROCITY

In a report to the IAAO Executive Board, Robert Flanagan, CAE, Professional Admissions Committee Chairman, outlined the IAAO position on reciprocity with the professional programs of other assessing/appraisal organizations. The IAAO Professional Designation Program is healthy, compared with the professional programs of most other organizations. IAAO candidates and designees now number 1,100--over 13 per cent of total membership, which is an all-time high. This growth is happening at a time when other organizations are struggling to maintain membership levels. Consequently, IAAO is not seeking new reciprocity agreements, though the organization is willing to entertain proposals for advancing the IAAO Professional Designation Program and attracting more members to the program.

IAAO now maintains only a few reciprocal agreements concerning the Professional Designation Program. One of these agreements has been abandoned by the American Institute of Real Estate Appraisers (AIREA), leaving the arrangement unilateral to IAAO. These agreements are as follows:

1. Bona fide reciprocal agreements with the Society of Real Estate Appraisers (SREA) and the Appraisal Institute of Canada (AIC) for demonstration appraisal reports that are required for professional designations. IAAO accepts reports from these organizations, and they accept its reports.
2. Until recently IAAO had a similar reciprocal arrangement with the

American Institute of Real Estate Appraisers (AIREA): The AIREA terminated its agreements with all organizations (actually, IAAO and SREA) for reciprocal credit on demonstration appraisal reports, apparently because of an unsuccessful merger attempt between the AIREA and the SREA and a restructuring of the overall requirements. IAAO accepts, without grading, demonstration appraisal reports accepted by the AIREA. It has not considered whether it will continue to do so.

IAAO's nonreciprocal agreements with other international appraisal organizations include:

1. The American Society of Appraisers (ASA) has incorporated several IAAO education courses into its designation requirements.
2. The Professional Designation Program accepts AIREA and SREA courses without review as substitute courses for IAAO designation credit.
3. The Professional Designation Program accepts education courses from all other appraisal organizations for its recertification program.

IAAO has no agreement, reciprocal or otherwise, with any state or provincial assessor organization on either education courses or designation credits.

IAAO is concerned about its relationship with the approximately sixty state and provincial assessor organizations, particularly those that have local education and designation programs. These organizations present formidable competition to the IAAO education and professional designation programs. To prevent a gap from developing between IAAO programs and state programs, the officers, board members, staff, and committee members of IAAO have been doing missionary work with states and provinces to encourage conformity with IAAO's education and professional programs. This effort to promote conformity must continue if the

splintering of professional certification that now exists in the nongovernmental appraisal industry is to be avoided in the governmental field.

North Carolina is a good example of how the IAAO Professional Program can function as an integral part of a state certification, education, and designation program. The 1983 General Assembly (in Chapter 813) specifically designated IAAO courses as a part of North Carolina's requirements for Assessor and Ad Valorem Tax Appraiser certification. The Institute of Government offers five IAAO courses a year as part of its assessment education curriculum, and the North Carolina Association of Assessing Officers' professional designation program is structured around these courses. In addition, the North Carolina Candidates' Club was founded to promote the attainment of IAAO's professional designations by North Carolina assessment personnel. As a result, the question of reciprocity with IAAO is moot in North Carolina, because the two programs--state and national--are efficiently congruous by design.

---

#### CANDIDATES' CLUBS DISCUSSED AT IAAO CONFERENCE

Candidates' Clubs and the IAAO Professional Designation Program was the topic at the Idea Exchange Round Table held during the recent IAAO conference in San Francisco. The session was well attended by members from many parts of North America who were interested in the Candidates' Club program. Robert Flanagan pledged the support of IAAO and the Professional Admissions Committee for developing candidates' clubs as a part of the IAAO Professional Designation Program.

The Round Table started with formal presentations by representatives from existing candidates' clubs and continued with open discussion. The following presentations were made:

**The Tennessee Experience**

Gary T. Harris, CAE  
 Assessment Analyst  
 Tennessee Public Service Commission  
 Nashville, Tennessee

**The North Carolina Experience**

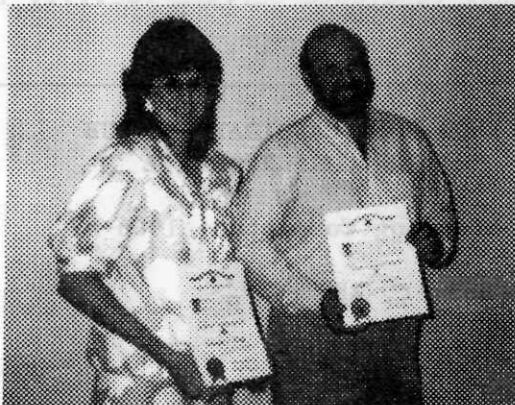
Joseph E. Hunt, CAE  
 Assistant Director  
 Institute of Government  
 UNC at Chapel Hill  
 Chapel Hill, North Carolina

**The Virginia Experience**

Thomas H. Lawler, Jr., CAE  
 Assessor  
 City of Lynchburg  
 Lynchburg, Virginia

Linda Basnight, President of the North Carolina Association of Assessing Officers (NCAAO), told the group how the NCAAO has supported the development of the North Carolina club. Discussion included questions and comments about procedures for starting a club. IAAO was asked to prepare a list of qualified speakers for candidates' club programs and to develop an intensive report-writing lock-in course similar to the one sponsored by the Society of Real Estate Appraisers, in which the students actually work on a demonstration appraisal.

---

**MECKLENBURG COUNTY'S NEWEST DESIGNEES  
 RECEIVE CERTIFICATES**


Deborah King, RES, and Ralph Neely Jr., CAE, receive certificates at the May meeting of the North Carolina Candidates' Club.

**REPORT-WRITING SEMINAR HIGHLIGHTS  
 NOVEMBER CLUB MEETING**

Using their recently approved demonstration appraisal reports as examples, Richard Beamer; RES, Debbe King, RES; and Ralph Neely, CAE, covered the details of writing such a report. Lane Helms, CAE, demonstrated the requirements of the income approach to residential property appraisal. This method of instruction proved highly effective, being based on actual demonstration reports. "This was the most informative meeting to date, and I've attended them all," said Ralph Warlick. "It helped to focus on one point of the report at a time; usually speakers cover too much material." Rose Robinson said, "I now have a better idea of how to handle time adjustments." Everyone seemed pleased with the program.

Don Liner, Institute of Government expert on finance and taxation, spoke to the club about the philosophy of House Bill 1314, introduced in the 1985 General Assembly to abolish the property tax. That proposal received statewide attention last year. He spoke from his findings as principal author of An Analysis of House Bill 1314: A Bill to Repeal the Property Tax in North Carolina, published by the Institute of Government. "House Bill 1314 in its original form is now dead. But the recent repeal of tax on household personal property was a direct result of HB 1314, and we will likely see more bills aimed at dismantling the property tax," Liner warned. Don thoroughly covered all aspects of state and local taxation and explained how these taxes fund local services and distribute cost to the taxpayer; the issue of equity in assessments he left to us.

Bill Tester organized a club mixer that was held in the Institute's third-floor lounge on Monday evening. After a long afternoon of study on appraisal report writing, everyone relaxed with good talk, beverages, and snacks. It was a grand time for all.

### FUTURE CLUB MEETING DATES SET

Meeting dates through 1988 have been selected by the Candidates' Club steering committee. All meetings will be held in Classroom III at the Institute of Government in Chapel Hill. As usual, all meetings will convene at 1:00 p.m. and adjourn the following day at noon. Spring meetings will focus on guest speakers, and fall meetings will focus on report-writing workshops and other candidate requirements. Future meeting dates are as follows:

| Year | Month     | Days                | Dates | Classroom |
|------|-----------|---------------------|-------|-----------|
| 1987 | April     | Monday/<br>Tuesday  | 13-14 | III       |
| 1987 | September | Thursday/<br>Friday | 3-4   | III       |
| 1988 | February  | Monday/<br>Tuesday  | 22-23 | III       |
| 1988 | November  | Thursday/<br>Friday | 3-4   | III       |

### THE AMERICAN INSTITUTE ACCOMMODATES GOVERNMENTAL APPRAISERS

Good news for those property tax appraisers who are working toward the MAI or RM designations appeared in the October issue of The Appraiser, published by the American Institute of Real Estate Appraisers. Some candidates and applicants to the Institute who work in government positions have expressed concern that they cannot obtain credit for their experience because their work is confidential, and therefore they cannot produce appraisal files for review by the chapter admissions committee. This problem has been overcome by appointment of a local member of the AIREA to review personally the work in question, thereby eliminating the need to send appraisal samples for admissions committee review and examination. If you are in such a

position, please notify the National Admissions Committee and your local chapter. Steps will be taken to arrange for review and evaluation of your experience.

Another matter of concern for some candidates in the Institute's program is the new requirement that all candidates for the RM or MAI designation have an undergraduate college degree from a degree-granting educational institution approved by the National Admissions Committee before they may be awarded either designation. This provision goes into effect for all applicants after January 1, 1987. If you are not now a candidate but your application is received on or before January 1, 1987, you may still apply for college equivalency under the present equivalency regulations.

For the comparative shoppers, a partial list of candidate fees charged by the American Institute of Real Estate Appraisers is listed below:

|  |       |
|--|-------|
| Application for candidacy.....                           | \$ 60 |
| Application for reinstatement<br>to candidacy.....       | 60    |
| Request for college equivalency....                      | 50    |
| Application to take required or<br>elective exams.....   | 80    |
| Application for the comprehensive<br>examination.....    | 100   |
| Grading fee for a demonstration<br>appraisal report..... | 90    |
| National candidate service fee.....                      | 125   |

### KNOW YOUR CANDIDATES' CLUB STEERING COMMITTEE

#### Steering Committee, 1986-87

Richard Beamer, RES  
145 Worth Street  
Asheboro, NC 27203

Margaret Claxton  
Route 1, Box 113-B  
Whittier, NC 28789

Debbe Z. King, RES  
6245 Gold Wagon Lane  
Charlotte, NC 28212

William H. Tester  
Room 115, County Courthouse  
Boone, NC 28607

Porter Stokes  
P.O. Box 7123  
Greenville, NC 27835

J. D. Brickhouse  
Route 1, Box 94  
Columbia, NC 27925

Lane Helms, CAE  
16336 Thompson Road  
Charlotte, NC 28212

Joseph E. Hunt, CAE  
455 Fair Oaks Circle  
Chapel Hill, NC 27514

Deborah Z. King, RES  
6245 Gold Wagon Lane  
Charlotte, NC 28214

David J. McCall, CAE  
5804 Simpson Road  
Charlotte, NC 28216

Ralph R. Neely, Jr., CAE  
15408 Shopton Rd., West  
Charlotte, NC 28210

Harry Schultz, CAE  
6125 Deliah Lane  
Charlotte, NC 28215

John C. Wallace, CAE  
P.O. Box 463  
Nags Head, NC 27959

Brice Wellman, CAE  
325 Largo Drive  
Greensboro, NC 27406

---

**KNOW YOUR NORTH CAROLINA  
DESIGNATED PROFESSIONALS**

Richard A. Beamer, RES  
145 Worth Street  
Asheboro, NC 27203

Robert L. Bonti, CAE  
4301 Maypole Court  
Charlotte, NC 28205

Sidney H. Covington, CAE  
4815 Pandora Court  
Charlotte, NC 28212

**KNOW YOUR CANDIDATES CLUB MEMBERS**

**NORTH CAROLINA CANDIDATES CLUB ROSTER**

**CANDIDATES CLUB—1986 MEMBERSHIP ROSTER**

| <u>Name</u>       | <u>Address</u>                    | <u>County/Company</u> | <u>Phone</u>   |
|-------------------|-----------------------------------|-----------------------|----------------|
| Ronald Antry      | 405 Middle St.<br>New Bern 28560  | Craven                | (919) 638-5104 |
| Nita Barton       | 12 East Main St.<br>Brevard 28712 | Transylvania          | (704) 844-3200 |
| Richard A. Beamer | 145 Worth St.<br>Asheboro 27203   | Randolph              | (919) 629-2131 |
| Randy Beeman      | P.O. Box 776<br>Bayboro 28515     | Pamlico               | (919) 745-4125 |

|                      |   |                                 |                |
|----------------------|---|---------------------------------|----------------|
| Jim Bethune          | 320 Chestnut St.<br>Wilmington 28401                  | New Hanover                     | (919) 763-2462 |
| Francis M. Blomme    | 117 Dick St.<br>P.O. Drawer 449<br>Fayetteville 28302 | Cumberland                      | (919) 483-8131 |
| Albert E. Boone      | Nash County Courthouse<br>Room 101<br>Nashville 27856 | Nash                            | (919) 459-4141 |
| J. D. Brickhouse     | P.O. Box 449<br>Columbia 27925                        | Tyrrell                         | (919) 796-1371 |
| Margaret Claxton     | Rt. 1, Box 113-B<br>Whittier 28789                    | Jackson                         | (704) 586-4055 |
| Joseph L. Cunningham | Rt. 4, Box 338-A<br>Forest City 28043                 | Rutherford                      | (704) 287-2211 |
| Cecil L. Dills       | Courthouse--c/o Tax Supv.<br>Sylva 28779              | Jackson                         | (704) 586-4055 |
| Bill Doolittle       | P.O. Box 68<br>Wentworth 27375                        | Rockingham                      | (919) 349-2922 |
| Douglas G. Elliott   | Rt. 5, Box 22A<br>Rutherfordton 28139                 | Rutherford                      | (704) 287-9713 |
| Martin Eudy          | 212 W. Main St.<br>Gastonia 28053                     | Gaston                          | (704) 866-3222 |
| Perry M. Grant       | P.O. Box 385<br>Elizabethtown 28337                   | Bladen                          | (919) 862-2188 |
| Edward S. Helms, Sr. | P.O. Box 30817<br>Charlotte 28230                     | Crescent Land<br>& Timber Corp. | (704) 373-8156 |
| Deborah Hill         | 145 Worth St.<br>Asheboro 27203                       | Randolph                        | (919) 629-2131 |
| Donna Hinson         | 201 S. Second St.<br>Albemarle 28001                  | Stanly                          | (704) 983-1873 |
| Jeffry Holland       | P.O. Box 68<br>Wentworth 27375                        | Rockingham                      | (919) 349-2922 |
| Don Irvin            | 3900 Jim Johnson Rd.<br>Concord 28025                 | Coldwell Banker<br>Bost Realty  | (704) 786-7181 |
| Kevin R. Jones       | 117 Dick St.<br>P.O. Drawer 449<br>Fayetteville 28302 | Cumberland                      | (919) 483-8131 |
| Deborah Z. King      | 6245 Gold Wagon Ln.<br>Charlotte 28212                | Mecklenburg                     | (704) 336-2813 |
| Charles A. Long      | 705 7th St.<br>North Wilkesboro                       | Tax Mgmt. Assoc.                | (919) 541-1974 |
| Shirley R. Lyda      | P.O. Box 7104<br>Asheville 28807                      | Buncombe                        | (704) 255-5780 |
| Randall W. Moose     | P.O. Box 389<br>Newton 28658                          | Catawba                         | (704) 464-7886 |
| Charles Ken Murray   | Nash County Courthouse<br>Room 101<br>Nashville 27856 | Nash                            | (919) 459-4141 |

|                      |   |                             |                |
|----------------------|---|-----------------------------|----------------|
| Eddie Parris         | 145 Worth St.<br>Asheboro 27203                       | Randolph                    | (919) 629-2131 |
| Stephen B. Pate      | P.O. Box 3427<br>Greensboro                           | Guilford                    | (919) 373-4857 |
| Jimmy A. Peay        | 117 Dick St.<br>P.O. Drawer 449<br>Fayetteville 28302 | Cumberland                  | (919) 483-8131 |
| Katherine L. Penland | P.O. Box 7104<br>Asheville 28807                      | Buncombe                    | (704) 255-5780 |
| Mary Jean Presnell   | Rt. 1, Box 315-A<br>Clyde 28721                       | Haywood                     | (704) 627-3795 |
| David Reid           | 12 East Main St.<br>Brevard 28712                     | Transylvania                | (704) 883-8153 |
| Rose Robinson        | 39 Tallman St.<br>Jacksonville 28540                  | Onslow                      | (919) 455-9700 |
| William A. Rodda     | 117 Dick St.<br>P.O. Drawer 449<br>Fayetteville 28302 | Cumberland                  | (919) 483-8131 |
| Terry L. Rowland     | P.O. Box 707<br>Concord 28025                         | Cabarrus                    | (704) 786-6177 |
| S. Jerry Smith, III  | P.O. Box 3427<br>Greensboro                           | Guilford                    | (919) 373-3330 |
| B. Porter Stokes     | P.O. Box 7123<br>Greenville 27835                     | F. Bruce Sauter<br>& Assoc. | (919) 758-7000 |
| Johnnie F. Stott     | P.O. Box 368<br>Smithfield 27577                      | Johnston                    | (919) 934-3195 |
| Bill Stroupe         | P.O. Box 1578<br>Gastonia 28053                       | Gaston                      | (704) 866-3222 |
| William H. Tester    | Watauga County Courthouse<br>Room 115<br>Boone 28607  | Watauga                     | (704) 264-1300 |
| Ralph D. Warlick     | Rt. 11, Box 1448<br>Hickory 28601                     | Mercer Simmons<br>MAI       | (704) 735-5368 |
| Tim Westbrook        | P.O. Box 987<br>Sanford 27330                         | INFOCEL                     | (919) 848-0001 |
| Joe L. Whitley       | 5012 Lakemont Dr.<br>Raleigh 27609                    | Wake                        | (919) 781-2272 |
| Jack A. Williford    | P.O. Box 530<br>Windsor 27983                         | Bertie                      | (919) 794-2137 |
| L. A. Jake Wolfe     | P.O. Box 466<br>Wilson 27893                          | S.C.N.                      | (919) 291-4417 |

## The North Carolina Candidates Club

## CONSTITUTION OF THE NORTH CAROLINA CANDIDATES CLUB

## ARTICLE I

Name and Objectives

Section 1. The name of this organization shall be the North Carolina Candidates Club.

Section 2. The objective of this club shall be to promote the International Association of Assessing Officers Professional Designation program in order to improve the standards of assessment procedure and practice throughout North Carolina.

## ARTICLE II

Membership and Dues

Section 1. Regular Members. Governmental (State and Local) employees who are actively involved in Property Tax Assessment in North Carolina. Annual dues payable on or before the first annual meeting shall be \$10.00 per year.

Section 2. Subscribing Members. Persons not eligible as regular members who subscribe to the objectives of the club. Annual dues payable on or before the first annual meeting shall be \$20.00.

Section 3. Honorary Members. CAE's who have attained their designation through the North Carolina Candidates Club or who have attained the CAE designation in the past who are residents of North Carolina.

Section 4. Voting Rights. Voting rights are reserved for regular members and subscribing members who are in good standing.

Section 5. Ethics. Every member of the club agrees to conduct himself or herself in a manner that shall reflect credit upon the profession of assessing; to protect that profession from any form of activity found to be unjust, unethical or detrimental to the public or to the profession; and to give strict adherence to the Code of Ethics which has been adopted by the North Carolina Association of Assessing Officers and the International Association of Assessing Officers.

Section 6. Dues. Members in good standing shall be those who have made timely payment of dues. Timely payment being dues paid on or before the first annual meeting.



## ARTICLE III

Steering Committee

Section 1. Selection. At the first annual meeting, two (2) persons who are members in good standing, shall be elected for a three (3) year term from the regular and subscribing members. Total membership shall be six (6).

Section 2. Moderator. The steering committee shall elect a moderator for the purpose of: a) calling steering committee meetings, (b) conduct the business for the steering committee, (c) report to the membership, (d) preside at regular club meetings.

Section 3. Secretary/Treasurer. The steering committee shall elect a Secretary/Treasurer to: a) serve as club secretary at all club meetings and steering committee meetings, b) to handle all correspondence for club, c) to handle all funds for club, d) to preside in absence of moderator at club meetings and steering committee meetings.

## ARTICLE IV

Meetings

Section 1. Meetings. The club shall hold two (2) annual meetings at the Institute of Government in Chapel Hill. Meetings shall be devoted to discussion of matters of interest pertaining to achieving a professional designation through the International Association of Assessing Officers Professional Admissions Program.

## ARTICLE V

Amendments

Section 1. Amendments. This Constitution may be amended by a majority vote of regular and subscribing members in good standing, present and voting at the annual meetings.

## ARTICLE VI

Fiscal Year

Section 1. Fiscal Year. the fiscal year of the club shall be from January 1 to December 31.

# JOIN the International Association of Assessing Officers

Since 1934, the International Association of Assessing Officers (IAAO) has sought to improve the standards of assessment practice and to convey to the taxpaying public the nature and importance of the work performed by assessing officers.

In brief, IAAO offers the following services (and more) to its members:

- timely periodicals and special publications
- an extensive library and information service
- continuing education
- a professional designation program
- conferences and symposiums
- special interest sections and subscription services
- research and technical assistance

IAAO regular membership is available to officers, officials, or employees of a governmental authority or jurisdiction whose duties are related to property

tax administration and assessment. Additional membership categories are available for other government employees, fee appraisers, attorneys, students, educators, and other interested individuals so no one need be excluded from participation in the programs and benefits of IAAO.

A first-year introductory dues rate of \$50 is available to individuals who have never previously been IAAO members.

Assessment administration and the property tax are rapidly gaining political and economic importance and becoming major issues in many states and provinces throughout the world. Stay informed with IAAO!

For further information write to IAAO Membership Secretary, 1313 East 60th Street, Chicago, IL 60637-9990, or call 312/947-2041.

.....  
International Association of Assessing Officers

Name \_\_\_\_\_

Title \_\_\_\_\_ Jurisdiction/Firm \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_ / \_\_\_\_\_

City \_\_\_\_\_ State/Province/Country \_\_\_\_\_ Zip \_\_\_\_\_

I hereby apply for membership in the International Association of Assessing Officers and certify that I have not been convicted of a felony, or of another crime reflecting upon my ability or willingness to comply with the requirements of the IAAO Code of Ethics and Standards of Professional Conduct. If accepted for membership, I will abide by the IAAO Constitution, pay the established dues, and comply with the Code of Ethics and Standards of Professional Conduct.

Date \_\_\_\_\_ Signature \_\_\_\_\_

Make checks payable to IAAO in U.S. funds. Dues are payable in advance.

Complete this application and return with payment to: IAAO, P.O. Box 94573, Chicago, IL 60690-4573

A total of 250 copies of this public document were printed by the Institute of Government, The University of North Carolina at Chapel Hill, at a cost of \$70.00, or \$.30 per copy. These figures include only the direct costs of reproduction. They do not include preparation, handling, or distribution costs.