



## **S.E.C. Policies and Protocols**

The Society of Exchange Counselors enjoys a sixty-year history of traditions and success strategies designed to maximize your effectiveness and productivity at an S.E.C. marketing meeting. The following policies and protocols serve to communicate our traditions and strategies to help our members and their guests achieve success.

### **Success Strategies:**

- 1) Set goals for your attendance at an S.E.C. marketing meeting. Come to the meeting prepared to meet your and your client's objectives.
- 2) Use of the electronic S.E.C. Preliminary Proposal form is recommended as a communication tool for use between and among attendee's and their respective clients.
- 3) The Society highly recommends that each attendee fully counsel their respective clients, partners or fellow owners, as to their objectives and motivations. Success at an S.E.C. marketing meeting is enhanced when your preparation, property research, and client counseling is thorough.
- 4) Prior to presenting a property from the meeting podium in a formal, moderated presentation, guests may participate in a pre-moderating session with the selected moderator. We ask that you be prepared to discuss your property, the owner, and their objectives, the challenges associated with the property, and other information when you step to the podium.
- 5) Color photos of the property must accompany any moderated presentation. Full backup information packages should also be available. The S.E.C. online property information packages should be complete and accurate.
- 6) S.E.C. education programs are available to guests. The S.E.C. encourages all guests to continually upgrade their creative real estate education with approved and recommended SEC curriculum. Please make participation in S.E.C. education programs a priority of your meeting objectives.
- 7) All guests are assigned an S.E.C. Member to act as a Mentor during the meeting. Please direct any questions or concerns that you may have to your assigned Mentor.
- 8) Your active participation and success at an S.E.C. marketing meeting is our mutual objective. Here are a few helpful hints and some terminology:
  - If you or your client might have interest in a property being presented, you are "Interested" and should discuss your interest with the presenter or request additional information.

- If you have counseled with your client and know that the property or opportunity being presented fits his or her objectives and parameters, you are a "Taker" and should write a Preliminary Proposal to the presenter sharing how you envision a transaction being discussed with your clients, partners, or yourself.

### **Property Information Packages:**

- 1) The online property information data sheet must be completed in its entirety. Incomplete or inaccurate data may result in the removal of all information from the marketing book and the S.E.C. web site.
- 2) If you need assistance with data input, please refer to the Help Center page of the S.E.C. web site or contact the S.E.C. Office.
- 3) Property information packages will automatically be placed in the database of the S.E.C. web site. In the event that you do not wish your property to appear on the S.E.C. web site after the meeting, you must indicate that by entering the appropriate answer at the bottom of the input form.
- 4) Property information packages are automatically removed from the web page at the termination of the listing, or upon transfer of ownership. The S.E.C. periodically removes information packages at its discretion.
- 5) Personal Property listings will not be accepted.

### **Society Traditions:**

- 1) On Sunday, Monday, and Tuesday evenings during a meeting, the Society hosts a social gathering that allows for the interaction of our guests, their spouses and friends, with the S.E.C. Family. Casual business attire is appropriate for these gatherings.
- 2) Monday meeting attire is formal business (jacket and tie for the gentlemen). Tuesday and Wednesday meeting attire is business casual.
- 3) A first time Guest Breakfast, and a Repeat Guest Breakfast are scheduled on Monday morning. Each guest is requested to attend their respective meeting at 7:30 a.m. Information about guest meetings will be available at the registration desk.
- 4) There are occasions when the S.E.C. seeks input from guests to clarify or identify ways to enhance the S.E.C. meeting experience. In the event you are asked, please be honest and candid. We welcome your input.
- 5) The spouses and friends of our guests are enthusiastically encouraged to join us at S.E.C. social gatherings. Monday and Tuesday mornings a continental breakfast is provided for spouses and friends. The spouse/friend fee also includes a special luncheon, and attendance at the evening gatherings.

## **S.E.C. Meeting Policies:**

All attendees at an S.E.C. Marketing Meeting must hold an active, valid real estate license.

S.E.C. meeting guests are required to register for S.E.C. marketing meetings and education programs online at the S.E.C. web site: [www.secounselors.com](http://www.secounselors.com).

S.E.C. meeting invitations are sent via email only. When you receive an invitation, please contact the S.E.C. office for your personal Guest ID and instructions regarding how to access to the Guest Meeting Registration section of the S.E.C. web site.

The online S.E.C. "Meeting Registration Agreement" must be submitted electronically to the Society prior to attendance at the marketing meeting.

All property information submitted to the S.E.C. for inclusion in the S.E.C. website and the S.E.C. meeting marketing book, or for presentation in a moderated presentation at an S.E.C. marketing meeting must be subject to a written Exclusive Listing or constitute a Partnership or Ownership interest by a meeting attendee.

Use of cellphones inside the marketing room is prohibited.

There shall be no handouts or other distributions inside the marketing room. Any property briefs, brochures, or other information may be placed on the designated tables in the Breakout Room.

The S.E.C. meeting website, PDF files and all of its contents and all other materials associated with the S.E.C. marketing meeting are the exclusive property of the Society of Exchange Counselors for its sole and proprietary use and may not be copied, disseminated or otherwise utilized for any purpose without the express written consent of the Society.

Use of the S.E.C. designation is a privilege of S.E.C. Membership. Any unauthorized use of the S.E.C. name or logo is prohibited.

## **S.E.C. Invitational Meetings:**

Attendance at a Society of Exchange Counselors marketing meeting is by invitation only. Attendance at one S.E.C. marketing meeting does not constitute an automatic invitation to additional future meetings.

Guest invitations are issued on a meeting-by-meeting basis and are continually evaluated by the Society's Board of Governors and may be continued or withdrawn at any time.

A meeting invitation may be withheld or rejected at any time without notification at the sole discretion of the Society.

**Should you have any questions, we invite you to contact the S.E.C. Office: [sec@secounselors.com](mailto:sec@secounselors.com)**