



# CCIM Institute Activity Data Form

**Include a copy of this page as the first page of every activity. Please type or computer-print.  
Title each Activity and use the same name on your Summary of Qualifying Activities.**

Activity #	
------------	--

CANDIDATE	
Today's Date:	
Name:	
Position in Company:	
Company:	
Business Address:	
City:	
State or Province:	
Zip or Mail Code:	
Country:	
Business Phone:	
Cell Phone:	
Fax:	
E-mail Address:	
Supervisor Name:	
Supervisor's Position in Company:	
Supervisor Business Phone:	
Supervisor E-mail Address:	

**Include a clear description of your day-to-day job responsibilities. A resume would also be helpful.  
These two items are particularly important for non-broker professions.**

SUBJECT PROPERTY						
Property Name:						
Property Address:						
City:	State or Province:	Zip or Mail Code:	Country:			
Year Built:	Occupancy at Sale:	Size:	# of Units:	Land Area		
New or Resale:	%	Square Feet		Acres		
<b>Type:</b>	<input type="checkbox"/> Office	<input type="checkbox"/> Retail	<input type="checkbox"/> Industrial	<input type="checkbox"/> Multifamily	<input type="checkbox"/> Hospitality	<input type="checkbox"/> Land
	<input type="checkbox"/> Project		<input type="checkbox"/> Residential Investment		<input type="checkbox"/> Other (describe):	

Activity						
Date Activity Completed:						
<b>Profession:</b>	<input type="checkbox"/> Sale/Purchase/Exchange	<input type="checkbox"/> Leasing Broker of Commercial Real Estate	<input type="checkbox"/> Developer of Commercial Real Estate	<input type="checkbox"/> Broker of Commercial Real Estate	<input type="checkbox"/> Consultant of Commercial Real Estate	<input type="checkbox"/> Residential Investor
	<input type="checkbox"/> Active Manager of Commercial Real Estate	<input type="checkbox"/> Active Advisor of Commercial Real Estate		<input type="checkbox"/> Corporate Officer of Commercial Real Estate	<input type="checkbox"/> Other (describe):	



## CCIM Institute Activity Data Form

<b>Buyer:</b>	<input type="checkbox"/> Insurance Company	<input type="checkbox"/> Pension Fund	<input type="checkbox"/> Bank	<input type="checkbox"/> REIT	<input type="checkbox"/> Credit Corporation	
	<input type="checkbox"/> LTD. Partnership	<input type="checkbox"/> Government	<input type="checkbox"/> Developer	<input type="checkbox"/> Owner-User	<input type="checkbox"/> Foreigner	
	<input type="checkbox"/> Private Investor	Other (describe):				
<b>Seller:</b>	<input type="checkbox"/> Insurance Company	<input type="checkbox"/> Pension Fund	<input type="checkbox"/> Bank	<input type="checkbox"/> REIT	<input type="checkbox"/> Credit Corporation	
	<input type="checkbox"/> LTD. Partnership	<input type="checkbox"/> Government	<input type="checkbox"/> Developer	<input type="checkbox"/> Owner-User	<input type="checkbox"/> Foreigner	
	<input type="checkbox"/> Private Investor	Other (describe):				
Mortgage Amount: \$			Interest Rate: %		Terms: Years	
<b>Capitalization Rates:</b>	Initial Cap Rate: %	IRR %				

For each property you MUST describe the property, analyze your role in great detail, reflect on what commercial and investment skills you used, or could have used, or in hindsight should have used and why. You are encouraged to attach supportive documentation that demonstrates your understanding and ability to use these skills. You need to convey a complete picture of the activity, with each step of the activity clearly and convincingly explained so that the graders can visualize the property and comprehend your reasoning from inception to completion. **In the event that adequate documentation of your involvement in a transaction or other elements are missing from your portfolio you may be contacted by a grader.**

In the description you must address each of the following:

Explain the activity from its inception to completion.

Explain your role in the activity and the perspective from which the case study was written.

Describe how you achieved or helped to achieve the principal's goal(s) and objective(s).

Discuss alternative courses of action that were available, how they were evaluated, and the basis on which the ultimate course of action was selected and other alternatives were rejected.

Describe the negotiation process and/or recommended course of action, including the decision criteria and decision points.

Detail the financing structure if applicable, including how it was selected and the benefits of choosing that form of financing.

***If you are submitting an activity in the 40 million dollar volume category you must submit a 3-5 page narrative and you may be required to submit additional information and/or documentation. Please be clear about every aspect of your activity and include details and back-up.***

***Use as much space as necessary to answer the questions below. There is no right amount of pages, include what is necessary and be clear and precise with your information.***

**Client's Goals & Objectives:** (Give a detailed description and use extra space as needed)

---



---



---

**List Your Specific Job Duties and Exact Role in this Activity** (Give a detailed description and use extra space as needed)

---



---



---



# CCIM Institute Activity Data Form

Your Job Title in this Activity: \_\_\_\_\_

Please give a detailed description and explain your use of CCIM skills in relation to this activity. This is the heart of your portfolio and it lets us know that you understand how and when to apply them. Provide examples and/or worksheet used. Explain why CCIM skills were important to your client and the success of this activity. If you completed this activity before you took the courses, please work through your project as if you had the knowledge. What CCIM Skills could you or should you have used at that time?

International candidates, please refer to the International Suggestions for your country:

---

---

---

VALUE of Activity \$ (Remember to provide documentation): Calculate rent to show total unless it is clearly stated.

Commission Received: Company: \$ Candidate: \$

If no commission received, explain how you are compensated and provide documentation.

---

---

---

OTHER PARTIES involved in Activity:  In Company?  Outside Broker or Other?  or Both?

*If you are a member of a partnership or team, be clear/explicit about how your role differed from theirs in this activity. What did you contribute to make it happen?*

Other Parties Name:

Other Parties Role in this Transaction:

Phone:

Email Address:

If more than one other agent, list all other agents involved and their roles:

**If you are the principal, give details and provide good documentation. Letters, etc. from those you work with outside your company are strong.**

**Principals in the Activity:**

Identify each principal by name, current address, and phone number (check appropriate category):

     Seller/      Landlord/      Other (describe):

Name:

Address:

Phone:

Email Address:

     Buyer/      Tenant/      Other (describe):

Name:

Address:

Phone:

Email Address:

*If this activity is not a "traditional transaction, please supply the key players and their relation to the project.*



# CCIM Institute Activity Data Form

**Proof of Activity** - Do not provide an entire lease or contract. Only the pages with pertinent information such as: price, term, property address, closing dates, signatures, etc. **Highlight all important information!** Calculate rent to show total unless it is clearly stated.

Signed Closing Statement     Signed Lease     Official Other Legal Documentation ( all documents must be signed, filed, notarized, etc.)     Other (describe):

---

---

**Proof of Candidate's Role (minimum of two):**  Copy of commission check

Signed/notarized statement     Signature as witness     Signature on listing agreement

Signature on selling agreement     Other (describe): \_\_\_\_\_

---

---

I do hereby affirm that I was *personally* involved in this activity and that I personally wrote and compiled this report. By my signature, I hereby grant permission to the CCIM Designation Committee or its appointed representatives to contact any or all of the parties in this transaction.

Signed \_\_\_\_\_

Date \_\_\_\_\_

PLEASE DO NOT WRITE IN THIS AREA – OFFICIAL USE ONLY

CCIM Grader: \_\_\_\_\_

Approved             \*Disapproved

Date: \_\_\_\_\_

\* Disapprovals required Vice Chairman signature: \_\_\_\_\_

***This activity data form is being used for all commercial professions. It is understood that not all questions work for everyone. Please adapt them to fit your case and answer as completely as possible.***