CCIM Institute
CCIM Portfolio Checklist

Date:
Candidate:
Phone:
Fax:

Specialization: __ Brokerage __ Development __ Mortgage Financing __ Consulting
__ Other (describe):

Format Requirements: __ One Volume/Single Binder __ 8 ½" x 11"
__ Tabs __ Reverse chronological order (most recent listed first) __ Portfolio Cover Sheet
__ Summary of Qualifying Activities __ Candidate's Signature Appears at the Bottom of Both Forms

Requirements for Each Qualifying Activity	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**	**21**	**22**	**23**	**24**	**25**	**26**	**27**	**28**	**29**	**30**
Year of Activity																														
Volume of Each Activity (list amounts)																														
Activity Data Form																														
Activity Completion date																														
Complete Property Address																														
Type of Activity Indicated																														
Candidate's % of Ownership of Commission																														
Total Purchase/Lease Amount																														
Participating Agent Name, Address, and Phone																														
Principal's Name, Address, and Phone																														
*Description of Property																														

*Analysis of Candidate's Role																														
*Skills used/ could have /should have																														
Settlement Documentation																														
Two (2) Proofs of Candidate's Role																														

When completing the Activity Data Form, use type size no larger than 12 point, describe the property, then analyze in detail your role and the CI skills you used or in hindsight could have used or should have used. You may also include APODs and Cash Flow Analyses. Since the grader was not present at the time, please explain in detail the flow of the activity and how you directed it. Prepare two (2) copies. Send the original to CCIM Institute and keep the other on file. The copy you send us will not be returned, so use your copy for revisions and for re-grading. If you have questions regarding your portfolio, contact the Designation Department at (312)321-4478.